



The **AWARDS** *Handbook*

A manual to implement the Sustainable Life Development (SLD) approach

October 2007

The AWARDS project was supported by the European Commission under the European Social Fund - Article 6 Innovative Measures (Agreement N° VS/2005/0315)



**EUROPEAN UNION
European Social Fund
Article 6 Innovative Measures**

The European Charter of “*Sustainable Life Development*”

Murcia, Spain

October 19th 2007

We, the participants in the final Conference of the AWARDS project inaugurate a new approach to merge Sustainable Development, Gender and Age management strategies.

This new approach, called *Sustainable Life Development* (SLD), was elaborated and tested by the AWARDS project (*Ageing Women workers Aimed at Renewing Development towards a Sustainable Life*) supported by the European Social Fund – Article 6.

The new approach chooses the quality of life to ensure a better future to the present and new generations by reconciling social progress, environmental preservation and economic growth.

According to the new approach, “*Sustainable Life is the human behaviour based on the capabilities to access to resources, integrating their economic, environmental and socio-cultural functions to meet simultaneously the needs of different persons, generations and territories*”.

The new approach correlates territorial Action Plans, entrepreneurial Pilot Initiatives and Local Scenario Workshops to:

1. foster equity, social justice and solidarity between generations and communities while improving gender and age management, flexicurity (flexibility and security) and multicultural cohesion
2. integrate the environmental dimension in all aspects of human behaviour to reutilise, recycle and reduce the consumption of natural resources while improving the quality of life in cities, towns, villages and workplaces
3. promote innovation and competition while reducing regional and local unbalances
4. involve all the concerned stakeholders in decision making while valuing democracy, subsidiarity and diversity
5. raise public awareness in all life fields while increasing education, training, research, good practises and technological advance

Now it is time to move from episodic and sectoral actions to long term and integrated strategies. Thus, we commit ourselves to mainstreaming, disseminating and updating the new approach, its methods and tools in order to promote, support and monitor other projects throughout the European Union.

Acknowledgements

This handbook connects theoretical issues and operational procedures to implement the Sustainable Life Development (SLD) approach.

A provisional version of this manual was elaborated in January 2006 and was utilised by nearly 40 researchers and 80 stakeholders to perform all the phases of the AWARDS project.

Ongoing results from the field work and precious comments from all partners were useful to improve the provisional version arriving at this manual that was approved during the Final Conference held in Murcia (Spain) the 19th of October 2007.

The manual is however open to the public debate for further improvement as an instrument aimed at promoting new SLD (Sustainable Life Development) projects.

The manual is the result of a collective work carried out by the AWARDS partners with a particular contribution from:

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PREFACE

The AWARDS project aims

The acronym AWARDS means Ageing Women workers Aimed at Renewing Development towards a Sustainable life.

The AWARDS project was performed between 2005 and 2007 to:

- address the dichotomy between Sustainable Development, gender and age management strategies
- elaborate an inter-disciplinary approach capable of coping with the issues of ageing women workers
- substantiate the approach with methods and user-friendly tools adaptable to different local contexts
- involve public sectors, the civil society (social partners included), companies, ageing women workers, practitioners and researchers in a coherent planning system

The AWARDS project was conceived to deal with a series of problems, namely:

- a low degree of women participation in the labour market and employment rate
- risk of social exclusion and poverty (e.g. single women with children)
- a negative correlation between precarious work environment and health
- lack of supportive systems, flexible work organisation and rules devoted to ageing women workers
- lack of integration between labour flexibility and social security policies aimed at increasing employment stability of women workers
- lack of integration between local plans for employment, training, social and health services
- lack of adequate social services and plans aimed at reconciling work and life times, especially devoted to women, families and ageing people
- lack of support to promote women enterprise creation
- lack of participation of women in decision-making both at territorial and company levels
- weak links between research and development especially referred to technological, organisational, economic, social and environmental innovation
- weak exchange and dissemination of good practices concerning different approaches and solutions to the above-quoted problems
- lack of a clear and overarching perspective towards a sustainable life development

Innovative courses of actions have been identified by the AWARDS project within paths that converge in the following main objectives:

- to improve the employability of ageing women workers
- to develop appropriate vocational guidance and training systems
- to create a supportive environment at a local context level
- to integrate the above-mentioned objectives into structural social, cultural, employment and health policies orientated towards sustainable development

The value added by the AWARDS project

A substantial literature and a wide body of experiences exist in the field of demographic change, age and gender management. The AWARDS project took stock of both this literature and these experiences within a compact scenario constituted by:

- five relevant European Union strategies (e.g. Employment, Social Inclusion, Corporate Social Responsibility, Sustainable Development and Governance)
- worldwide relevant policy perspectives (e.g. the Rio, Beijing, Johannesburg, Human Development and Millennium programmes and Declarations)

The AWARDS project has gone beyond the state-of-the-art because it:

- is contributing to move from a generic “quality of life” approach to an integrated and multidisciplinary “Sustainable Life Development” (SLD) approach
- has experimented with this approach and utilised lessons stemming from the grass roots

The SLD approach is supported by methods and user friendly tools for:

- analysing local contexts in order to determine territorially suitable strategies
- analysing work organisations, behaviours and human resources’ strategies in order to determine innovative actions that are appropriate at a company dimension
- correlating both the territorial and entrepreneurial strategies in an overarching vision on future development (in a 15 years’ distance) shared by the relevant local stakeholders to ensure a continuity of actions at local level while disseminating the SLD approach throughout the European Union

In few words, the added value of the AWARDS project consists in the SLD approach, methods, tools and lessons that have a transnational scope.

The aims of this handbook

This manual aims at disseminating a quite complete, coherent and consistent platform that promotes change in styles of life, production and consumption towards sustainable development paths.

These paths include and pursue theories and practices of age and gender management in employment and social inclusion policies.

The manual in fact provides:

- a theoretical framework to improve knowledge
- an operational framework to identify ways in which the present policies, activities and services could be improved
- a stable connection between theory and practice to nourish open learning processes towards a Sustainable Life Development

Who should use this handbook?

This manual is addressed to a wide range of stakeholders including civil society organisations, policy makers, practitioners and researchers.

Specific groups of stakeholders are formed to support the fieldwork and to contribute to the elaboration of innovative plans and initiatives in territorial and entrepreneurial systems. These stakeholders can foster significant changes in local contexts and companies. They should not only read and understand this manual but:

- suggest any possible and useful improvement
- act as linguistic and learning mediators capable of transferring concepts, criteria, methods and techniques to other persons and organisations using the most appropriate languages and communication instruments

The structure of this handbook

The manual consists of ten Chapters connected by ten introductory sentences that anticipate the contents on which the SLD approach relies upon:

- the improvement of the human beings capacity to access to resources (economic, environmental and socio-cultural) while respecting fair opportunities and responsibilities between generations, persons and territories (*C1. Sustainable life*)
- the understanding of “system” as a whole of interrelationships between people, resources and courses of actions existing in a specific context (*C2. System*)
- the improvement of “governance” as an overarching process in which interrelationships within and between nested systems (e.g. a territory, a local community and a company) allow human beings to cope with and solve problems innovating styles of life, production and consumption (*C3. Governance*)
- the mainstreaming of “equal opportunities” as a system of proactive measures in all fields (particularly economic, social, cultural and family life), also to integrate gender and age management, employment and social inclusion policies, flexibility and security with a specific attention to the most vulnerable persons and social groups (*C4. Equal Opportunities*)
- the exchange of knowledge from current practices and the identification of ingredients that can be utilised to stimulate and strengthen creativity and innovation while valuing diversity (*C5. Connecting Theory and Practice*)
- the integration of different interests and relationships within and between policy fields as well as territorial and entrepreneurial systems (*C6. Stakeholder Analysis*)
- the improvement of the local stakeholders capacity to define innovative “flexicurity” strategies for age and gender management through fluid interrelationships and integration between different policy fields in a territorial system (*C7. Action Plans*)
- the improvement of the local stakeholders capacity to define innovative arrangements for age and gender management in entrepreneurial systems through fluid interrelationships and integration between work, family and social times (*C8. Pilot Initiatives*)
- the improvement of the local stakeholders capacity to think strategically (long term perspective) and to act immediately through an overarching picture of future development that allows hypotheses of innovative actions to be simplified, verified and integrated at business and territorial levels (*C9. Local Scenario Workshop*)
- the support to local stakeholders in evaluation and decision making processes (*C10. On-line SLD system*)

The first four Chapters have a theoretical aim providing explanation on arguments and thoughts that substantiate the SLD approach.

The fifth Chapter introduces methods to search for practices that support the approach.

The following four Chapters have a more operational nature describing how to carry out basic analyses (e.g. on stakeholders, local contexts and workplaces), how to elaborate strategies (e.g. action plans and pilot initiatives) and how to correlate them (e.g. scenario workshops).

The final Chapter illustrates the structure of the on-line (Internet-based) SLD system that supports evaluations and decisions.

How to use this handbook

The manual is itself a system, since it favours interrelationships between theoretical concepts and practical methods.

Even though the Chapters are presented in a specific order, they can be read according to the individual ways of thinking and needs of each user.

She/he can firstly have an overall picture of the manual reading the introductory page and the final summary section of each Chapter.

Then a personalised path can be determined connecting various concepts and operational suggestions.

For instance looking at the concepts that define a system (Chapter 2), the reader could wish to understand how to deal with a territorial or an entrepreneurial system. Through the summary sections, the reader can easily identify what are the more appropriate Chapters that meet her/his needs (in this case, for instance, Chapter 7 and Chapter 8).

Moreover the first four theoretical Chapters provide, in their summary sections, key definitions and key questions concerning the issues and topics taken into consideration.

Then the reader can easily understand theoretical aspects while skipping a more in depth analysis of their theoretical background to move towards the Chapters that have a more practical nature.

Vice versa while reading the more operational Chapters, the user could become interested in a thorough analysis of the concepts on which the operational aspects rely upon. She/he finds useful references to go directly to the Chapters where these concepts are presented in detail.

CHAPTER 1: SUSTAINABLE LIFE

Introduction

The Sustainable Life Development (SLD) approach aims at improving the capacity of human beings to access to resources (economic, environmental and socio-cultural) while respecting fair opportunities and responsibilities between generations, persons and territories.

This Chapter opens the debate on the Sustainable Life Development (SLD) approach that guides the elaboration of plans on age and gender management based on the integration of courses of action aimed inter alia at:

- improving the employability of ageing women workers
- developing appropriate vocational guidance and training systems
- harmonising social inclusion, employment, health, socio-cultural and other associated policies
- co-ordinating measures at both public policy (e.g. community services, social security) and the enterprise (e.g. workplace, work organisation) levels
- creating a supportive environment at a territorial and entrepreneurial context
- involving governments, social partners, other stakeholders and the workers themselves into every initiative

The following paragraphs present basic explanations on the main properties of:

- Life
- Sustainability
- Sustainable Development
- Corporate Social Responsibility (CSR)

Life

Life is considered to be a characteristic of humans, plants, animals and what generally is named “matter” in a whole system (the Earth, our Planet), as well as in distant places (other planets, the Universe, the multi-universes and so on).

“What is Life” is the object of age-old debates: a philosophical challenge of the human beings. Science gives broad or restricted definitions according to the available but evolving knowledge of the nature (e.g. biology, physics, chemistry) and the human behaviour (e.g. sociology, psychology, anthropology).

A converging perspective appears from different disciplines to define life as:

- complex and original ways of organising the existence, that is the state of being in complete reliance upon the physical universe (Morin E., 1980 – sociologist and philosopher)
- property of a system as a whole (e.g. ecosystems, planets) rather than of individual organisms or species (Morowitz H., 1992 – biophysicist)
- metabolic processes that nourish (“breath of life”) components and their relationships in complex networks, patterns and systems (Capra F., 2003 – physicist and systems theorist)
- a vast network of constant intimate and subtle relationships that connect its elements and make it possible their evolution; mind and consciousness evolve within the biosphere (the Earth) and the latter within the universe; human beings are not isolated individuals but elements embedded into the wider reality of the cosmos (Laszlo E., 2000 – evolutionary systems philosopher)

Summing up, life is both a force and a process: it is the vital energy (“breath”) made by natural and hidden connections between different systems of smaller and wider dimensions; it is the dynamic process that combines differently networked patterns in which individual systems (components or parts) organise themselves through close relationships within and between wider systems.

Humanity is an important component of life but not the only one: “We distanced ourselves from the natural universe around us and came to regard ourselves as separate from it. Since then, from a position outside nature, we have measured it and studied it, exploited it and harnessed it. We have treated nature as an object in relation to ourselves, by bringing to bear upon it the objective processes of science and the manipulative processes of technology ... We have treated other species as things, to be captured, observed, vivisected, used and destroyed to suit human purposes. This perception of nature as something apart from ourselves has had a tremendous impact on what we have thought of as work, and on the kinds of work people have done and have valued during the industrial age” (Robertson J., 1985).

The human choices, behaviours and styles of life express how human beings organise their relationships within and between the systems, affecting the whole natural environment, given that:

- “nature *is* society and society is also *nature*” (Beck U., 1992)
- life is within the Earth history and human beings exist within that history (Morin E., 1993)
- “Understanding life means understanding its inherent change processes” (Capra F., 2003)

To understand life, a clear distinction should be made between the concepts of:

- growth, that is an increase in size measured in quantitative terms
- development, that is an improvement in living conditions and quality of life
- evolution, that is a wholistic (cosmic) process where a never-ending complexity of dynamic systems determines changes, events and phenomena through an open exchange of matter, information and energy (e.g. the formation of stars from atoms and the formation of complex societies from anthropoid apes)

To go along with these distinctive concepts, further definitions are necessary concerning:

- complexity and complication; complexity is the natural state of a system, the property and quality to connect widely and densely parts embedded in multiple levels of actions and entanglement even though they are perceived by the available human knowledge as containing a certain degree of uncertainty and a certain combination of order and disorder (Morin E., 2005); complexity should not to be confused with complication, which denotes a situation or event that is not easy to understand, and to deal with
- “living conditions” and “quality of life”; even though there is a close correlation between them, “living conditions generally refers to the circumstances of people’s everyday life, whereas quality of life is a broader concept, referring to the overall wellbeing of people living in a society” (EF, 2003)

That of “quality of life” is a value-based concept, socio-culturally determined in different contexts through dense networks of interrelationships between persons, households, communities, institutions, policies and so on. Quality of life refers to “the overall wellbeing of those living in a society” reflecting “not only living conditions and control over resources across the full spectrum of life domains, but also the ways in which people respond and feel about their lives in those domains” (EF, 2003).

A central element in improving quality of life “is now seen to be enabling people, as far as possible, to attain their own goals, within the constraints imposed by economic sustainability and respect for the rights and needs of others” (EF, 2003). This definition focuses the attention on a wide diversity of expectations and outcomes that are conditioned, facilitated and constrained by the resources and contexts. More than prescribing a specific set of rules, quality of life “can serve as an overarching frame” encompassing many “other concepts that apply at the level of the individual, family, community and society”, such as opportunities, disadvantage and exclusion, social inclusion, socio-economic security, social cohesion, social capital, social quality, human development, ‘liveability’, empowerment and enhancement of the capacity of people to participate in the life of their society (EF, 2003).

Amartya Sen introduced the concepts of “functioning” more directly related to living conditions and “capability” more related to the quality of life. As Sen explained: “A functioning is an achievement, whereas a capability is the ability to achieve” (Sen A., 1987).

More specifically, Sen defined functionings as different aspects of living conditions in terms of the “various things a person may value doing or being” (Sen A., 1987), like “basket of goods” from which a person should be able to choose in leading a life, for instance, being adequately nourished and in good health, having self-respect and being socially integrated.

Functionings regard the living conditions that are “the circumstances of people’s everyday lives” in terms of, for example, employment, education, health, housing, transport and commuting, family life, crime, safety, disparities associated with age, gender, ethnicity and region, family situation, local neighbourhood good health, migration, the work environment or amenities in the home (EF, 2003).

The focus is on the access to resources through which a person can control and consciously direct her/his living conditions (individual well-being) within a general standard of living that is reflected, for instance, in consumption patterns.

The characteristics of the contexts in which resources are used affect of course the scope for individuals to direct their own lives.

Resources are necessary to life and they have the property “to rise again”, from the Latin word “resurgere” (to come back to life). The value of a given set of resources is not only of an economic nature (e.g. money, possessions) but socio-culturally determined in terms of knowledge, skills, health, mental and physical energy, social relationships, and so on.

Following the Senian approach, “quality of life” depends on “capability”, which is a “notion of freedom, in the positive sense: what real opportunities you have regarding the life you may lead” (Sen A., 1987).

Capability “represents the various combinations of functionings that a person can achieve. Capability is, thus, a set of vectors, reflecting the person’s freedom to lead one type of life or another ... to choose from possible livings” (Sen A., 1992).

Therefore, human beings have the ability to convert resources into functions (“capability”) taking into account the amount of information they have to consider the diversity of individual situations in terms of “personal heterogeneities, environmental diversities, variations in social climate, differences in relational perspectives, distribution within the family” (Sen A., 1999).

The Sen’s work improved the conceptual framework to face the current development challenges inspiring new approaches at a world level. For instance, the United Nation Development Programme (UNDP) affirms that Human Development:

- “is about creating an environment in which people can develop their full potential and lead productive, creative lives in accord with their needs and interests.(...) Fundamental to enlarging choices is building human capabilities – the range of things people do or be in life. The most basic capabilities for human development are to lead long and healthy lives, to be knowledgeable, to have access to the resources needed for a decent standard of living and to be able to participate in the life of the community. Without these, many choices are simply not available, and many opportunities in life remain inaccessible” (UNDP, 2001)
- “is about people, about expanding their choices to lead lives they value (...) Fundamental to enlarging human choices is building human capabilities: the range of things that people can do or be.” (UNDP, 2002)

This point of view shifts “the focus of development economics from national accounting to people centred policies” (Haq M., 1995).

Sustainability

“People do not die for lack of incomes. They die for lack of access to resources. (...) For centuries, principles of sustenance have given human societies the material basis of survival by deriving livelihoods directly from nature through self-provisioning mechanisms. Limits in nature have been respected and have guided the limits of human consumption” (Vandana Shiva, 2005).

“Resources move from the poor to the rich, and pollution moves from the rich to the poor” (Vandana Shiva, 2000).

“Peace and security are an indispensable precondition to sustainability and overcoming poverty. War and violent conflict afflict devastating damage to the environment (...) destroying and undermining the resources on which even larger numbers of people depend for their livelihoods” (Maurice Strong, Lecture at York University, Toronto, September 28th, 2001).

Sustenance (means of living, livelihood, action of sustaining life) and to sustain are words derived from the Latin “sub” (below) + “tenere” (to hold) meaning to hold up (support, keep up, nourish, survive, endure) from below.

Taking into considerations the concepts analysed in the previous paragraph, “sustainability” is the capacity (ability) to sustain life from the bottom of the constant intimate and hidden relationships that connect all kind of system in the Earth and the Universe.

Human mind is embedded in these relationships (Bateson G., 1979) as well as consciousness is subtly and instantaneously linked both to the human and the other systems also by means of non conventional forms of energy like *prana*, *kundalini* and *chi* (Laszlo E., 2000).

These hidden connections (Capra F., 2003) and the unity of knowledge (Teilhard de Chardin P.,1955) without limits in space (e.g. western and eastern philosophies), time (e.g. old and new cultures) and matter (e.g. different scientific disciplines) make it clear that sustainability is “the capacity (ability) of reconciling humanity and nature”.

“This we know. The Earth does not belong to man; man belongs to the Earth. This we know. All things are connected. Whatever befalls the Earth, befalls the sons of the Earth. Man did not weave the web of life. He is merely a strand in it. Whatever he does to the web, he does to himself” (from Chief Seattle’s oration of 1852).

“We didn’t inherit the Earth from our parents; we borrowed it from our children” (Kenyan old proverb).

“Humanity is part of a vast evolving universe. Earth, our home, is alive with a unique community of life. The forces of nature make existence a demanding and uncertain adventure, but Earth has provided the conditions essential to life’s evolution. The resilience of the community of life and the well-being of humanity depend upon preserving a healthy biosphere with all its ecological systems, a rich variety of plants and animals, fertile soils, pure waters, and clean air. The global environment with its finite resources is a common concern of all peoples. The protection of Earth’s vitality, diversity, and beauty is a sacred trust” (The Earth Charter, 2000).

Especially during the last four decades, significant changes improved the human consciousness and mind awareness for the human beings to be sustainable and to sustain life. A two-century civilisation started from the Western cultures with "an instrumental orientation towards the domination of physical nature" (O’Neill J., 1995) has been progressively questioned by a new process of civilisation with a multidimensional orientation towards sustainability (as reconciliation between humanity and nature) through the integration between cultures, philosophies and scientific disciplines (Morin E., 1993).

“The dominant patterns of production and consumption are causing environmental devastation, the depletion of resources, and a massive extinction of species. Communities are being undermined. The benefits of development are not shared equitably and the gap between rich and poor is widening. Injustice, poverty, ignorance, and violent conflict are widespread and the cause of great suffering. An unprecedented rise in human population has overburdened ecological and social systems. The foundations of global security are threatened. These trends are perilous—but not inevitable” (The Earth Charter, 2000).

“The choice is ours: form a global partnership to care for Earth and one another or risk the destruction of ourselves and the diversity of life. Fundamental changes are needed in our values, institutions, and ways of living. We must realize that when basic needs have been met, human development is primarily about being more, not having more. We have the knowledge and technology to provide for all and to reduce our impacts on the environment. The emergence of a global civil society is creating new opportunities to build a democratic and humane world. Our environmental, economic, political, social, and spiritual challenges are interconnected, and together we can forge inclusive solutions” (The Earth Charter, 2000).

According to various students, different visions of development have emerged during the last decades. For example, main values and tendencies between two opposing visions can be identified (Robertson J., 1985), the former called “He”, the latter “She”.

HE = business as usual super industrial development	SHE = changing the direction of development towards sustainability
<ul style="list-style-type: none"> ▪ Quantitative values and goals ▪ Economic growth ▪ Organisational values and goals ▪ Money values ▪ Contractual relationships ▪ Intellectual; rational detached ▪ Masculine priorities ▪ Specialisation / helplessness ▪ Technocracy / dependency ▪ Centralising ▪ Urban ▪ European ▪ Anthropocentric 	<ul style="list-style-type: none"> ▪ Qualitative values and goals ▪ Human development ▪ Personal and inter-personal values and goals ▪ Real needs and aspirations ▪ Mutual exchange relationships ▪ Intuitive, experiential, empathetic ▪ Feminine priorities ▪ All-round competence ▪ Self-reliance ▪ Local ▪ Country-wide ▪ Planetary ▪ Ecological

There was an intense mobilisation of experts, key politicians, governments, social communities and non-governmental organisations (NGOs), which have contributed to the rise of the topic of sustainability at the top of the agenda concerning worldwide priorities (Strong M., 2001).

“We stand at a critical moment in Earth's history, a time when humanity must choose its future. As the world becomes increasingly interdependent and fragile, the future at once holds great peril and great promise. To move forward we must recognize that in the midst of a magnificent diversity of cultures and life forms we are one human family and one Earth community with a common destiny. We must join together to bring forth a sustainable global society founded on respect for nature, universal human rights, economic justice, and a culture of peace. Towards this end, it is imperative that we, the peoples of Earth, declare our responsibility to one another, to the greater community of life, and to future generations” (The Earth Charter, 2000).

That of sustainability is a regulative idea (like Freedom, Solidarity, Justice and Democracy), based on a broad vision concerning its subjects (humans and nature), the scale (from individuals to the globe) and its normative implications (conditions for survival), that has to be interpreted and applied concretely in every situation depending on the actors, on their perception of the new values, on their culture, on the degree in which these values are shared among and within the international, national, regional and local social communities (Schleicher – Tappeser R. et al., 1998).

The need for an Universal Declaration on Sustainability and Sustainable Development was firstly met by the 1992 Rio Earth Summit and in 1994 Maurice Strong (the secretary general of the Earth Summit and chairman of the Earth Council) and Mikhail Gorbachev (president of Green Cross International) launched a new Earth Charter initiative with support from the Dutch government, forming an Earth Charter Commission in 1997. According to this Commission (www.earthcharter.org/), “The Earth Charter is the product of a decade long, worldwide, cross-cultural conversation about common goals and shared values (...), the most open and participatory consultation process ever conducted in connection with an international document. Thousands of individuals and hundreds of organizations from all regions of the world, different cultures, and diverse sectors of society have participated. The Charter has been shaped by both experts and representatives of grassroots communities. It is a people's treaty that sets forth an important expression of the hopes and aspirations of the emerging global civil society”.

The Earth Charter Principles (2000)

I. RESPECT AND CARE FOR THE COMMUNITY OF LIFE

1. *Respect Earth and life in all its diversity*
2. *Care for the community of life with understanding, compassion, and love*
3. *Build democratic societies that are just, participatory, sustainable, and peaceful*
4. *Secure Earth's bounty and beauty for present and future generations*

II. ECOLOGICAL INTEGRITY

5. *Protect and restore the integrity of Earth's ecological systems, with special concern for biological diversity and the natural processes that sustain life*
6. *Prevent harm as the best method of environmental protection and, when knowledge is limited, apply a precautionary approach*
7. *Adopt patterns of production, consumption, and reproduction that safeguard Earth's regenerative capacities, human rights, and community well-being*
8. *Advance the study of ecological sustainability and promote the open exchange and wide application of the knowledge acquired*

III. SOCIAL AND ECONOMIC JUSTICE

9. *Eradicate poverty as an ethical, social, and environmental imperative*
10. *Ensure that economic activities and institutions at all levels promote human development in an equitable and sustainable manner*
11. *Affirm gender equality and equity as prerequisites to sustainable development and ensure universal access to education, health care, and economic opportunity*
12. *Uphold the right of all, without discrimination, to a natural and social environment supportive of human dignity, bodily health, and spiritual well-being, with special attention to the rights of indigenous peoples and minoritie.*

IV. DEMOCRACY, NONVIOLENCE, AND PEACE

13. *Strengthen democratic institutions at all levels, and provide transparency and accountability in governance, inclusive participation in decision making, and access to justice*
14. *Integrate into formal education and life-long learning the knowledge, values, and skills needed for a sustainable way of life*
15. *Treat all living beings with respect and consideration*
16. *Promote a culture of tolerance, non-violence, and peace*

To sum up, sustainability is simultaneously a scientific, cultural and political topic. On this topic, concepts and principles have been elaborated by a large crew of scientists, see for instance: Pantaleoni M, 1913; Pigou A. C, 1920; Daly H. E., 1973, 1974; World Bank, 1986; Pearce D. et al., 1990; Serageldin I., 1993; WWF, 1993; Jacobs M., 1991; Turner R. K. et al., 1994; Adriaanse A., 1995; Tiwari D. N., 1995. From the above contributions, a set of criteria for sustainability emerges which can be summed up as follows:

- the environment must be maintained as a natural capital which has three main function as a source of natural resources, as a sink for waste and environmental pollutants, as a provider of conditions to maintain life
- renewable resources must be utilised at rates less than or equal to their natural or managed rates of regeneration
- non-renewable (exhaustible) resources must be utilised at rates at which renewable substitutes can be created through technological progress
- generation of wastes and their discharges to the environment must be at rates less than or equal to those of a clearly monitored and demonstrated assimilative capacity of the environment without impairing it
- life-support services of the environment (e.g. genetic diversity and climate regulation) must be maintained
- society must be aware of all the biological implications existing in the economic activity
- environmental and social costs must be internalised to give a new qualitative and quantitative re-addressing to the performance of making profit and to foster innovation
- taxation and subsidies must be used to increase social responsibility and environmental commitment of citizens, since they are simultaneously suppliers, producers, consumers and policy makers
- accessibility (capability to access) to rights, goods, services and places must be guarantee to all human beings applying principles of equity, active citizenships, participation, responsibility, integration of cultural identities and institutional reliability, that is the basic functioning of human systems)

Sustainable Development

The theme of sustainability appeared in the 1968 Biosphere Conference (organized by UNESCO in Paris) as the capacity to nourish (then to sustain) human development (both economic and social) reconciling conservation and use of natural resources through an integrated management of land, water and biodiversity.

From that time on, the human knowledge of sustainability has increased hugely arriving at defining principles, contents and courses of action related to sustainable development. Worldwide declarations, documents and protocols constitute the milestones of a relevant even though tortuous and conflicting path. It is worth mentioning:

- the UN Conference on the Human Environment (Stockholm 1972) that initiated a series of international environmental treaties and conferences
- the UN World Commission on Environment and Development (chaired by Ms Brundtland, 1983) that elaborated the universally accepted definition of sustainable development included in the famous book *Our Common Future* (1987)
- the UN Earth Summit (Rio 1992) that approved the universal Declaration on Environment and Development, the related Agenda 21, the Climate Change and Biodiversity Conventions

- the UN World Summit on the Millennium (New York, 2000) that approved the Declaration on the main goals to be achieved in a fifteen years' perspective
- the UN World Summit on Sustainable Development (Johannesburg, 2002) that capitalised on the courses of action implemented in ten years of experiences after the Rio Summit (Rio+10)
- the Climate Change Convention, elaborated in Kyoto in 1997 (so called the Kyoto Protocol) and enforced in 2005

“Human beings are at the centre of concerns for sustainable development. They are entitled to a healthy and productive life in harmony with nature” (...) “Peace, development and environmental protection are interdependent and indivisible” (Principles 1 and 25 of the 1992 Rio Declaration).

Sustainable development is (Brundtland Commission, WCED, 1987):

- *a development that meets the needs of the present without compromising the ability of future generations to meet their own needs*
- *a process in which the exploitation of resources, the direction of investments, the orientation of technological development and institutional change are all in harmony, and enhance both current and future potential to meet human needs and aspirations*

These definitions imply that:

- human beings increase their awareness, consciousness and capacity to take strategically wise decisions and to perform adequate courses of actions to utilise, maintain and passing the available resources on to future generations
- all generations wisely govern this heritage, preserving, replacing and substituting resources in order to reduce progressively the environmental deficits in such a way that these will not be a burden and threat to posterity
- human beings increase their capacity (capabilities) of integrating the economic, environmental and socio-cultural dimensions of development to overcome poverty, using the life resources (functioning) to meet simultaneously the needs of social equity (between individuals), inter-local equity (between different local communities) and inter-temporal equity (between different generations)

Attention is especially focussed on the capabilities of the human beings to:

- recognise first of all the value of the basic resources of the Planet life (the environment and biodiversity)
- recognise individual and collective diversities (e.g. cultures and styles of life) to integrate global and local commitments, dimensions and perspectives for mainstreaming fair (sustainable) production, trade and consumption in all policy fields
- remove restrictions and obstacles to what a person can do and be in life (e.g. illiteracy, unemployment, poverty, social exclusion, ill health, lack of civil and political freedoms, lack in trust, dignity, solidarity and mutual respect)
- enforce civil and political rights, human and worker's rights and democracy
- pursue and put in value the gender equality integrating labour, employment and socio-cultural policies

“Investing in people” is the motto of the European Social Fund as a mission that joins a very wide range of programmes and instruments.

The need to create such a huge capacity became a priority since the time of the Rio Declaration and Agenda 21 (1992) arriving at the 2000 UN “Millennium Declaration” that defined 8 goals to be achieved in a fifteen years’ perspective (2015): eradicate extreme poverty and hunger; achieve universal primary education; promote gender equality and empower women; reduce child mortality; improve maternal health; combat HIV/AIDS, malaria and other diseases; ensure environmental sustainability; develop a global partnership for development.

This commitment is clearly echoed also in the European Strategy for Sustainable Development (CEC, 2001).

A Sustainable Europe for a Better World: A European Strategy for Sustainable Development (CEC, 2001, Gothenburg)

The strategy identifies six priorities that include long-term outcomes, measures and means:

- Combat poverty and social exclusion
- Deal with the economic and social implications of an ageing society
- Limit climate changes and increase the use of clean energy
- Address threats to public health
- Manage natural resources more responsibly
- Improve the transport system and land-use management

The European Union has, in fact since the Amsterdam Treaty of 1997, required that all policies and programmes funded by the EU be conceived and implemented in accordance with the principles of Sustainable Development.

Several acts have confirmed this strategic orientation, the most relevant being the Charter of Fundamental Rights of the European Union (Nice, 2000) and the EU Draft Treaty establishing a Constitution for Europe.

Draft Treaty establishing a Constitution for Europe Article 3: The Union’s objectives

1. The Union’s aim is to promote peace, its values and the well-being of its peoples
2. The Union shall offer its citizens an area of freedom, security and justice without internal frontiers, and a single market where competition is free and undistorted
3. The Union shall work for the sustainable development of Europe based on balanced economic growth, a social market economy, highly competitive and aiming at full employment and social progress, and with a high level of protection and improvement of the quality of the environment. It shall promote scientific and technological advance. It shall combat social exclusion and discrimination, and shall promote social justice and protection, equality between women and men, solidarity between generations and protection of children’s rights. It shall promote economic, social and territorial cohesion, and solidarity among Member States. The Union shall respect its rich cultural and linguistic diversity, and shall ensure that Europe’s cultural heritage is safeguarded and enhanced

4. In its relations with the wider world, the Union shall uphold and promote its values and interests. It shall contribute to peace, security, the sustainable development of the earth, solidarity and mutual respect among peoples, free and fair trade, eradication of poverty and protection of human rights and in particular children's rights, as well as to strict observance and development of international law, including respect for the principles of the United Nations Charter
5. These objectives shall be pursued by appropriate means, depending on the extent to which the relevant competences are attributed to the Union in the Constitution

Reviewing the Sustainable Development Strategy, the EU Commission further elaborated “a Platform for Action” (CEC, 2005) following the Declaration on Guiding Principles for Sustainable Development launched by the EU Council of June 2005.

EU Council June 2005: Declaration on Guiding Principles for Sustainable Development

Sustainable development is a key objective set out in the Treaty, for all European Community policies. It aims at the continuous improvement of the quality of life on earth of both current and future generations. It is about safeguarding the earth's capacity to support life in all its diversity. It is based on the principles of democracy and the rule of law and respect for fundamental rights including freedom and equal opportunities for all. It brings about solidarity within and between generations. It seeks to promote a dynamic economy with full employment and a high level of education, health protection, social and territorial cohesion and environmental protection in a peaceful and secure world, respecting cultural diversity.

To achieve these aims in Europe and globally, the European Union and its Member States are committed to pursue and respect, on their own and with partners, the following objectives and principles:

Key objectives

Environmental Protection

Safeguard the earth's capacity to support life in all its diversity, respect the limits of the planet's natural resources and ensure a high level of protection and improvement of the quality of the environment. Prevent and reduce environmental pollution and promote sustainable production and consumption to break the link between economic growth and environmental degradation.

Social Equity and Cohesion

Promote a democratic, socially inclusive, cohesive, healthy, safe and just society with respect for fundamental rights and cultural diversity that creates equal opportunities and combats discrimination in all its forms.

Economic Prosperity

Promote a prosperous, innovative, knowledge-rich, competitive and eco-efficient economy which provides high living standards and full and high-quality employment throughout the European Union.

Meeting Our International Responsibilities

Encourage the establishment and defend the stability of democratic institutions across the world, based on peace, security and freedom. Actively promote sustainable development worldwide and ensure that the European Union' internal and external policies are consistent with global sustainable development and its international commitments.

Policy guiding principles

Promotion and Protection of Fundamental Rights

Place human beings at the centre of the European Union's policies, by promoting fundamental rights, by combating all forms of discrimination and contributing to the reduction of poverty and the elimination of social exclusion worldwide.

Solidarity within and between Generations

Address the needs of current generations without compromising the ability of future generations to meet their needs in the European Union and elsewhere.

Open and Democratic Society

Guarantee citizens' rights of access to information and ensure access to justice. Develop adequate consultation and participatory channels for all interested parties and associations.

Involvement of Citizens

Enhance the participation of citizens in decision-making. Promote education and public awareness of sustainable development. Inform citizens about their impact on the environment and their options for making more sustainable choices.

Involvement of Businesses and Social Partners

Enhance the social dialogue, corporate social responsibility and private-public partnerships to foster cooperation and common responsibilities to achieve sustainable production and consumption.

Policy Coherence and Governance

Promote coherence between all European Union policies and coherence between local, regional, national and global actions in order to enhance their contribution to sustainable development.

Policy Integration

Promote integration of economic, social and environmental considerations so that they are coherent and mutually reinforce each other by making full use of instruments for better regulation, such as balanced impact assessment and stakeholder consultations.

Use Best Available Knowledge

Ensure that policies are developed, assessed and implemented on the basis of the best available knowledge and that they are economically sound and cost-effective.

Precautionary Principle

Where there is scientific uncertainty, implement evaluation procedures and take appropriate preventive action in order to avoid damage to human health or to the environment.

Make Polluters Pay

Ensure that prices reflect the real costs to society of production and consumption activities and that polluters pay for the damage they cause to human health and the environment.

Corporate Social Responsibility (CSR)

Corporate Social Responsibility (CSR) is intrinsically linked, and constitutes a business contribution, to Sustainable Development.

According to the European Green Paper (CEC, 2001a) and the related strategy paper CEC, 2002), CSR is defined as a concept whereby:

- companies integrate social and environmental concerns and impacts in their business operations and in their interaction with their stakeholders on a voluntary basis
- the business behaves over and above legal requirements, voluntarily adopted because businesses deem it to be in their long-term interest

CSR is not an optional "add-on" to business core activities, but regards the way in which businesses are managed.

European Roadmap for Businesses Towards a Sustainable and Competitive Enterprise (www.csreurope.org)

This European Roadmap for Businesses is an initiative led by CSR Europe together with its National Partner Organisations in one same commitment. In our view, there cannot be a trade off between profits and people. Economic growth is vital to build a competitive, sustainable and inclusive Europe holding its rank worldwide. Sustainable competitiveness demands the simultaneous improvement of economic, environmental and social performance in the short and the long term. This transforms the scope of corporate responsibility, accountability and performance. Engaging with stakeholders - internal and external - becomes essential. This extension of business responsibility has a direct impact on strategy, organisation and management. It is therefore vital that new skills be developed. The process requires and generates innovation in every compartment of business activity. This innovation is key to competitiveness (...) translating into practice international and European principles, standards and conventions e.g. Universal Declaration of Human Rights, EU Charter of Fundamental Rights, ILO Declaration on Fundamental Principles and Rights at Work, OECD Guidelines (...)

Our Goals

1. Innovation and entrepreneurship
2. Skills and competence building
3. Equal opportunities and diversity
4. Health and safety
5. Environmental protection

Strategies to achieve these goals

6. Corporate responsibility in the mainstream of business
7. Stakeholder engagement
8. Leadership and governance
9. Communication and transparency
10. Business-to-business co-operation and alliances

Summary

This Chapter initiates the elaboration of an operational framework for the Sustainable Life Development (SLD) approach, presenting concepts that constitute its foundation. The concepts considered in this Chapter concern the “What” and “Why” of the SLD approach.

Both the definitions of these specific concepts and the answers to two key questions are summarised here below.

Key definitions

Life is both 1) the vital energy (“breath”) made by natural and hidden connections between different systems, and 2) the dynamic process that combines differently networked patterns in which individual systems organise themselves through close relationships within and between wider systems.

Sustainability is the capacity (ability) of reconciling humanity and nature.

Sustainable Development is a development that meets the needs of the present without compromising the ability of future generations to meet their own needs.

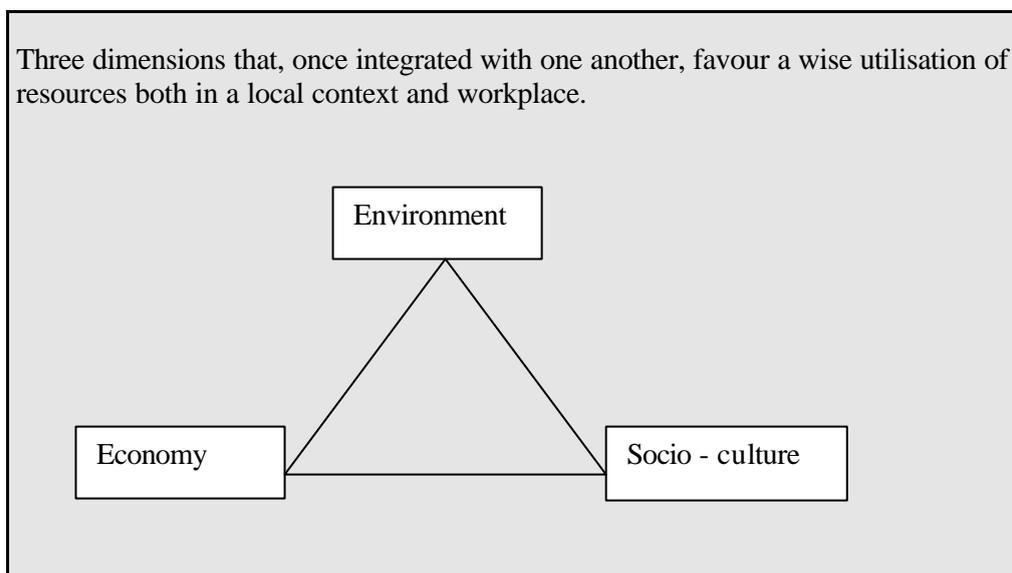
Corporate Social Responsibility (CSR) is the entrepreneurial behaviour that, voluntarily adopted over and above legal requirements, integrates social and environmental concerns and impacts in business operations and in the interaction with the relevant stakeholders.

Sustainable Life is the human behaviour based on the capabilities to access to resources integrating their economic, environmental and socio-cultural functions to meet simultaneously the needs of different persons, generations and territories.

Key questions

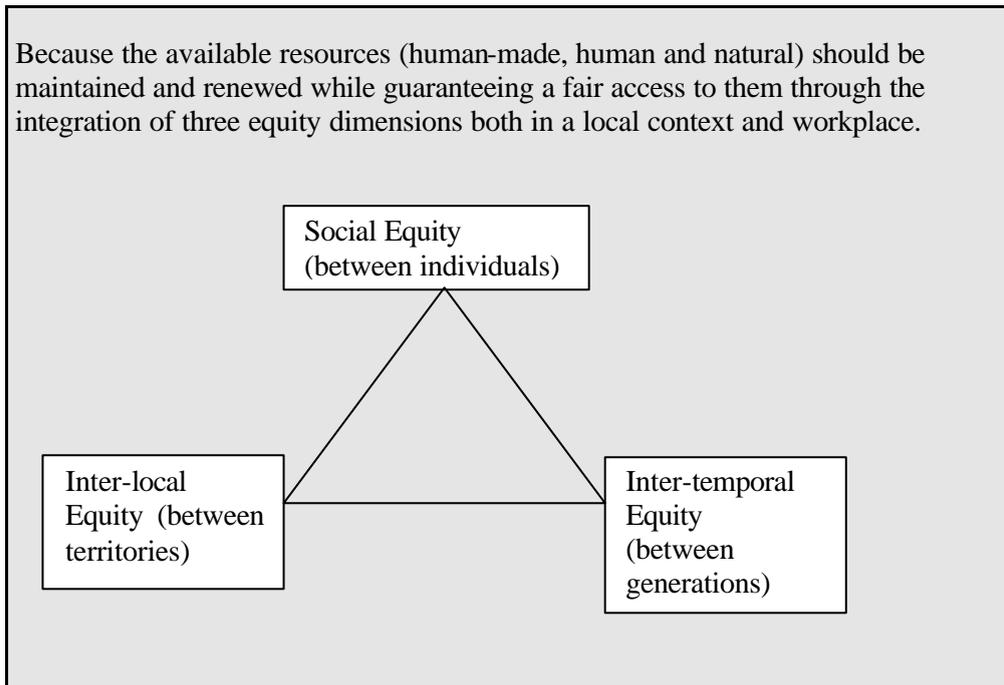
The first key question for a SLD project is:

What development dimensions have to be taken into consideration to elaborate plans that nourish sustainable life styles?



The second key question for a SLD project is:

Why human beings need to develop sustainable styles of life?



The answers to the “What” and “Why” of the Sustainable Life Development (SLD) approach address the courses of action to be performed at territorial and corporate levels

- towards the “reconciliation between humanity and nature” through the integration of three development dimensions
- while eradicating barriers, discriminations and disparities associated with age, gender, ethnicity, region, socio-economic and cultural situations through the integration of three equity dimensions.

Other questions (namely “How”, “When” and “Who”) will be debated in the following Chapters to complete the theoretical and operational framework for a SLD (Sustainable Life Development) project utilising concepts and elements of the holistic *SQM - Sustainable Quality Management*® system founded by Ruggero Schleicher Tappeser and Filippo Strati in 1999.

**The democratic judge (Bertold Brecht,
Poems 1941 – 1947)**

In Los Angeles, before the judge who examines people trying to become citizens of the United States came an Italian restaurant keeper. After grave preparations hindered, though, by his ignorance of the new language in the test he replied to the question: What is the 8th Amendment? falteringly: 1492. Since the law demands that applicants know the language he was refused.

Returning after three months spent on further studies yet hindered still by ignorance of the new language he was confronted this time with the question: Who was the victorious general in the Civil War? His answer was: 1492. (Given amiably, in a loud voice).

Sent away again and returning a third time, he answered a third question: For how long a term are our Presidents elected? Once more with: 1492.

Now the judge, who liked the man, realized that he could not learn the new language, asked him how he earned his living and was told: by hard work.

And so at his fourth appearance, the judge gave him the question: When was America discovered? And on the strength of his correctly answering 1492, he was granted his citizenship.

CHAPTER 2: SYSTEM

Introduction

The Sustainable Life Development (SLD) approach adopts the definition of “system” as a whole of interrelationships between people, resources and courses of actions existing in a specific context.

All the SLD operational phases are influenced by the above-mentioned definition given that:

- a territorial system is the field of the Local Context Analysis (LCA) aimed at formulating comprehensive territorial “Action Plans”
- entrepreneurial systems are the subjects of the Workplace Analysis (WA) aimed at formulating business “Pilot Initiatives”

Interactions within and between those systems are of a paramount importance to closely merge Pilot Initiatives and Action Plans through the integration of different policy fields.

A SLD project requires openness of and collaboration between a series of systems, for instance services, agencies, communities and individuals. Currently each of them constitutes often a separate system, but each of them is unavoidably animated by hidden or manifested dynamics of change.

There is necessity to utilise these dynamics of change to improve the participation of the above-mentioned systems in connecting strategies, different policy fields, Action Plans (territorial dimension) and Pilot Initiatives (corporate dimension).

The following paragraphs present basic explanations on the main properties of:

- System
- Entrepreneurial and territorial systems
- Knowledge system
- Participatory system
- Holistic system
- System dynamics

System

A system can be conceived as the globally organised unity of interrelationships between elements, actions or individuals (Morin E., 1977).

This definition is currently both comprehensive and innovative while it changes the way of thinking and seeing the system: from its components to its interrelationships.

The quality of a systems depends upon the quality of its internal and external links and is determined by its dynamics as a recursive combination of parts that are at the same time parts of a shared system and individual systems. The system co-evolves and self-organises itself at the extent that the relationships allow a common life.

An easy example to understand the functioning of a system is the case of labour market, where supply and demand sides are constituted by people who operate in different organisations (companies, families, social communities, associations and groups of interest, employment services, development agencies, etc.).

While being consequently very difficult, it is also useless to divide what is naturally unite into separated paths, for instance a path devoted to economic resources and another path looking at human resources. The former is in fact managed according to orientations, decisions and actions performed by the latter.

As Pascal B. (1670) wrote, the part is in the whole and the whole is in the part, therefore only holistic thinking can allow humanity to understand and manage relationships within itself (human beings) and with the other components of a wider system (nature):

- "Since everything, then, is cause and effect, dependent and supporting, mediate and immediate, and all is held together by a natural though imperceptible chain which binds together things most distant and most different, I hold it equally impossible to know the parts without knowing the whole and to know the whole without knowing the parts in detail."
- "If man made himself the first object of study, he would see how incapable he is of going further. How can a part know the whole? But he may perhaps aspire to know at least the parts to which he bears some proportion. But the parts of the world are all so related and linked to one another that I believe it impossible to know one without the other and without the whole."
- "Man, for instance, is related to all he knows. He needs a place wherein to abide, time through which to live, motion in order to live, elements to compose him, warmth and food to nourish him, air to breathe. He sees light; he feels bodies; in short, he is in a dependent alliance with everything. To know man, then, it is necessary to know how it happens that he needs air to live, and, to know the air, we must know how it is thus related to the life of man, etc. Flame cannot exist without air; therefore, to understand the one, we must understand the other."

Every local context expresses its own relationships' networks. They allow the territorial social potentials to grow in terms of explicit capacities (capabilities) according to the density, intensity and fluidity of the exchange flows (information, knowledge, values, culture, approaches, methods and so on) between people and organisations.

Both individuals and organisations constitute systems that are not separated one from the other but deeply embedded (nested) by their interrelationships and by the quality of social interaction that animate them: even though conflicting, each component (being an individual, a family, a company and other types of organisation) influences the others.

In other words a system co-evolves according to the self-organising ability expressed by its components (that is other systems) and vice versa.

A system expresses a dialogical continuity of interrelationships and exchange between the components (e.g. closeness and openness; inflows and outflows dynamics), which characterises the constant and mutual influences between levels and dimensions (larger and smaller, higher and lower). At the same time, as energy, matter and information pass across the different levels of the system, its natural dynamics is to remain open ended (Prigogine I. and Stengers I., 1984; Ulanowicz R. E., 1986).

Subsidiarity

Subsidiarity saw its origin from military language. Subsidiarity comes from the Latin concept of *subsidium*, which indicated the reserves (the supporting troops). The support (*subsidium*) to the front lines is temporary. If reserves substitute definitely the front lines, it means that the risk to lose the battle is high and then the security of a country is endangered.

Nowadays the meaning of subsidiarity influences the governance dynamics, both in corporate organisational behaviour and in the overall society. Subsidiarity is understood as an institutional and social process orientated to some basic principles that connect vertical and horizontal directions:

- the capacity of individuals and/or smaller social groups to take care of themselves should not be hampered
- higher or bigger organisations can intervene only when and where the lower or smaller scales do not have this capability; this is the "vertical" direction of subsidiarity that favours devolution of policy making to lower levels and smaller dimensions
- all levels of society should improve the relationships between the private, social and public sides; this is the "horizontal" direction of subsidiarity that gives to individuals and their communities the responsibility to organise and manage public functions by themselves
- the subsidiary role of higher or bigger organisations must be temporary in nature; their basic commitment must be to allow individuals and/or minority groups to develop self-management, self-administration and self-governance, by means of empowerment and capacity-building
- organisational systems should provide and assure flexibility and adaptability, in both vertical and horizontal directions, in order to give cohesion between their members; this means adopting a style of "multi-level governance", where vertical relationships between higher and lower levels, larger and smaller dimensions, are conceived and managed in a horizontal way, respecting authoritative roles according to a value added scale

The subsidiarity principles improve the human capacity to connect different decision making levels (higher and lower), spatial dimensions (bigger and smaller), time extents (shorter and longer terms) and components (institutional, socio-cultural, economic and environmental).

The subsidiarity principles require a shift from centralised structures to federalism, democracy, co-operation, networking, partnership and participation, while asking for holistic and synergetic methods which assume the importance of diversity and unity, limits and well-being (Welford R., 1995; Handy C., 1994).

However, not all the systems created by the human beings arrive at a positive utilisation of the innate "*holonic* properties", that is the capacity to be simultaneously a nest and to be nested within another system (Kiuchi T. and Shireman B., 2002).

Holon means "a whole that is also a part" (Koestler A., 1967), merging the Greek terms "holos" (whole) and "on" (entity).

Holonic properties clearly distinguish between:

- complex nesting or overlapping systems capable of being self-governed, resilient and adaptable in efficiently co-evolving ways (*Holarchy*)
- organisations based on a flow of functional decisions taken along a vertical "top - down" line of command and control (*Hierarchy*)

Entrepreneurial system

"No business is an island. You cannot manage a business, let alone a networked business, on its own. You must manage the ecosystem, in which your business inhabits.(...) Businesses can no longer work in a singular, linear way. Once you have learned a new language, it is impossible to unlearn it. The new language is (...) about working in a holistic and organic way" (Power T. and Jerjian G., 2001)

Holonic companies are those where (McHugh P., Merli G. and Wheeler W. A., 1995):

- intensive networking activities exist among the members (each of them as a whole), the company (the member as a part and the business as a whole), other companies (each of them as a whole), and the larger social community (the business as a part, the community as a whole)
- each component (holon) contains characteristics of the entire network leaving in a dynamic equilibrium because of permanent interactions with the internal and external environment
- each part of the network creates its own web with other parts in other networks
- evolutionary capacity develops along the network (as a whole) as a complex loop between different webs (each of them as a part) in multiple and multidirectional trajectories not limited by one-way causation
- together the parts determine the dynamics of the network while changes within the network determine the dynamics of each web
- self-regulating capacity is nurtured by self-learning processes, open access to and exchange of knowledge and information within and across the network boundaries

Studies, theories and schools (especially in sociology and psychology) have revealed how different cultures characterise the past, the present and the future of entrepreneurial systems. Different beliefs distinguish for instance between the narrow-minded view of a system devoted to profit maximisation and the open-minded vision of a system useful for "Right Livelihood (...) optimal pattern of consumption, producing a high degree of human satisfaction by means of a relatively low rate of consumption" (Schumacher E. F., 1973).

A company is more and more seen as

- a living being (De Geus A., 1997) characterised by adaptiveness (learning), identity (persona), inside and outside relationships with people and institutions (ecology), capacity to develop over time (evolution)
- a day-by-day learning system (Garrat B., 1994) where place is given to flexible, informal, lean, non-hierarchical, shamrock and federal organisations (Handy C., 1993, 1994), to networking and innovation, to a synergistic use of endogenous (local) and exogenous (global) resources, to the capitalisation of different experiences and knowledge (Senge P. et al., 1994, 1999)

Glocacity is the” capability to act locally with a global perspective, and to be effective globally with both global and local perspectives”(OECD, 1996)

- a value system that can move its orientation from the product to the market, the customer satisfaction and prosumerism, a term derived from the fusion of producer and consumer to indicate how they interact in a vital way along the entire life cycle of resource’s supply, transformation and utilisation (Toffler A., 1981)
- a participatory system where stakeholders’ involvement (Wheeler D. and Sillanpää M., 1997) has become the useful source to foster the total chain of value-adding, while moving towards local development, environmental management, social responsibility and sustainable development.

“Sustainability has to be seen as within the intrinsic business concepts like profit and loss, debt and equity, capital and cost (...) shifting perspective from the profit motive (...) it may be necessary to sacrifice considerable short-term gains in order to secure long-term benefits (...) organisations that serve the needs of the greater society in which they exist are more likely to prosper” (Welford R., 1995).

“The emphasis on the environment will shift from mere protection of the environment to recovery of what has deteriorated. Sustainable development will become the rule for business expansion, and global attention will be given to the future (...) Organisations that shifts from polluting to recovery technologies will gain significant competitive advantage” (Pasmore W. A., 1994).

The entrepreneurial system is animated by continuous recombination and interlinks between companies that co-operate, compete, conflict and ally themselves with one another at the same time (Capra F., 2003, Lemoine W. and Dagnaes L., 2003):

- economic world has shifted from being a cluster of national economies to being more linked in an interdependent network of marketplaces that overcome the limits of geographical boundaries
- multinational corporations influence the global economy, from financial to production and consumption phases, both directly or indirectly (through networks and associations)
- large corporation are structured in decentralised networks of “dependently” autonomous small units
- a series of small and medium sized enterprises are actually under control and domination of large corporations (e.g. subcontracting, market areas, financial and technological dependency)
- businesses are moving towards networks based and digital economy (the advance of information and communication technology) utilising, for instance, electronic commerce
- a series of small and medium sized enterprises create their own networking relationships with large and / or other small and medium sized enterprises to cope with market niches and financial ventures
- companies form collaborative mechanisms with suppliers, buyers, other producers (competitors and allies) and consumers
- civil society organisations (environmental, socio-cultural, human rights, peace, feminist movements, etc.) increase their role as company’ stakeholders through networks that transcend local and national boundaries

Territorial system

“A dynamic system that is defined as composite unity is a network of productions of components that (a) through their interactions recursively regenerate the network of productions that produced them, and (b) realize this network as a unity in the space in which they exist by constituting and specifying its boundaries as surfaces of cleavage from the background through their preferential interactions within the network, is an autopoietic system” (Maturana H., 1980)

The property to be “autopoietic” means to have a *self-producing, self-organising and co-evolving capacity*. In fact the term “autopoiesis” merges the Greek word poiesis (creation or production) and auto (self), in order to express "what takes place in the dynamics of the autonomy proper to living systems" (Maturana H. and Varela F., 1980).

The concept of autopoiesis was extended to social systems (Luhmann N., 1995), denoting the capacity to be autonomous, self-propelled and self-contained by means of principles, codes and practices co-evolved within internal webs and external linkages. As it is for natural systems, social communities have fuzzy boundaries absorbing new energy and force from outside.

“Luhmann’s project is essentially to develop the concept of autopoiesis as Maturana and Varela used it and employ it in new sets of terminologies adapted to the study of social systems. It is clearly not an attempt at drawing an analogy between organic and social systems, but rather a way of trying to come to grips with the complexity and the evolution of social systems” (Hernes T. and Bakken T., 2003).

The term “complexity” derives from the Latin “complecti” (to embrace, to include, to cover, to entwine) and “complexus” (embrace, aggregation of parts).

“Thus, the idea of nonlinearity – a network of intertwined strands – lies at the very root of the meaning of ‘complexity’ (...) the focus is now shifting from the structures to the processes of their emergence (...) According to the systemic understanding of life, living systems continually create, or re-create, themselves by transforming or replacing their components. They undergo continual structural changes while preserving their web-like patterns of organisation.” (Capra F., 2003).

According to the above-mentioned considerations, a territorial context, which is a complex system, can be recognised as a nested autopoietic system (Strati F. et al., 2004) since it:

- contains different systems (governments, citizens, families, associations, groups of interests), which are confronting each other
- ensures the creation and life of new components, both as individuals and their communities (networks)
- together with its networked components, is continuously changing in time and space
- self-recognises and self-defines its own boundaries
- is self-referential and, at the same time, open to other systems by means of mutually determined developmental actions that correspond to different cycles of life (human, non-human, etc.) and spatial dimensions (larger or smaller according to the scope of activity of the components)

Knowledge system

“There are more things in heaven and earth, Horatio, than are dreamt of in your philosophy”
(Hamlet, Shakespeare)

“...we can know more than we can tell. (. . .) We know a person's face, and can recognize it among a thousand. (. . .) without being able to tell, except quite vaguely, by what signs we know it” (Polanyi M., 1967)

“... knowledge continues to expand globally while passing from one generation to the next ... from the search of new fundamental laws towards new kinds of synthesis – “holism”, if you prefer, in order to understand complex systems (...) *consilience*, literally a “jumping together” of knowledge by the linking of facts and fact-based theory across disciplines to create a common groundwork of explanation” (Wilson E. O., 1999)

Therefore:

- knowledge is immense
- knowledge flows within and among systems (as well as information, energy and matter) being embedded in a huge variety of interrelationships (individual, organisational and societal) from the past, present and future times, from local, inter-local and global spaces, and so on
- human beings both individually than as a whole cannot know everything
- however they learn through an open collective process concerning several dimensions of a system (spatially, temporally, socially, economically and environmentally determined)
- most of what they know consists of habits and culture that they do not recognize in themselves even though individually managed and blended in a socially conveyed process (tacit knowledge)
- tacit knowledge (Polanyi M., 1958 and 1967) has a subsidiary role that assists the capacity to learn through formally explicit processes
- knowledge is an informal ability of the mind to integrate several dimensions of thinking, which cannot be replaced by formal operations, but only improved or blocked by them

Though embedded in the economic, socio-cultural and natural systems, knowledge constitutes simultaneously an independently complex system (the “noosphere” - or sphere of mind - Teilhard de Chardin P.,1955; Popper K.,1994; Morin E., 1986) that:

- evolves autonomously and has a self-organising capacity while being created and cultivated by the human mind and relying on all the other systems
- nourishes the world of ideas, concepts, theories, cultures, while being endowed with a dependant autonomy, having its own life and the power to influence the human mind

Historically human knowledge appeared as an united entity (whole) but it has been artificially and continuously separated by humankind. At the same time, the unity of knowledge has been recognised as a need and a means for understanding (from the Latin “cum” and “prehendere”, to take and to put all together, to merge).

For instance, *Consilience*, a term introduced in 1840 by Whewell W. (“The Philosophy of the Inductive Sciences”), was recently reaffirmed (Wilson E. O., 1999) to re-combine what the human beings divided into disciplinary domains (e.g. Biology, Ethics, Social Science and Environmental Policy).

Knowledge connects people and communities, values, beliefs, behaviours, that is the basic components of culture (within groups) and civilisation (among different cultures).

Without participation, different individuals cannot produce shared cultures and different cultures cannot converge in a wide civilising process (Norbert E., 1939; Morin E., 1993; Giddens A., 1990).

Participatory system

Participation means that each individual is legitimised to take part in a system (e.g. community and society), its activities, actions and development at whatever level it may be. Shortly, participation is the key factor of an “active citizenship” within a system and between it and other systems. Having defined a system as a whole of interrelationships between its components (other internal wholes), participation relies on the quality of these internal and external links.

Participation at and among all levels of a system is strongly determined by the capacity of its components (individuals), a capacity built upon mutual trust and shared knowledge that favour co-evolution among so many different components (individuals) of a complex and huge system (the united entity of human mind).

Knowledge evolution depends upon how many components (both individuals and social communities) are allowed to participate in the debate (at all the levels of the society and decision making), how many of them are given opportunities for a continuous acquisition (learning), combination (understanding) and dissemination (representing) of knowledge.

In other words knowledge is cultivated by a “cognitive democracy” (Morin E., 1999):

- understanding that knowing and reasoning are not aimed at meeting an absolute certain verity
- conversing with uncertainty
- recognising and utilising the dialogical relation between concepts and notions which seem to be contradictory or opposite
- being aware of the necessity of coping with complexity and uncertainty
- avoiding the tendency towards reductionism which limits the knowledge to phenomena that can be quantified, measured and formalised
- acknowledging that the comprehension of individual parts depends upon the comprehension of the whole, as well as the comprehension of the whole depends upon the comprehension of individual parts
- developing the capacity to contextualise and to globalise knowledge and actions
- understanding unity within and between diverse situations as well as diversity within what is united in a specific context

Holistic system

Since the part is in the whole and the whole is in the part (*oneness*), Unity in Diversity and vice versa (Diversity in Unity) are the natural conditions that make it possible a system to be resilient while co-evolving.

Resilience is the capacity of a system (environmental, human, social, economic, etc.) to react and adapt to natural or induced stress or shock situations by resisting or changing in order to reach and maintain an acceptable level of functioning and structure.

Resilience is in fact the physical property of a material that can return to its original shape or position after deformation that does not exceed its elastic limit and in all the typologies of system means the ability to recover from some shock, insult, or disturbance during or after this kind of situations (short or long as they may be).

In particular, a social system has to be fully aware of limits, risks, conflicts and so on in order to increase its capacity for organising itself through a dialogical attitude capable of combining conservation, revolution and resistance (Morin E., 1993).

Diversity is constituted by a wide range of different characteristics, features or organisms with variation in their qualities or attributes:

- in a social system, individuals are different from each other (personality, education, life and work styles, religion, race, ethnicity, gender, sexual orientation, etc.)
- in an environmental system, variety and variability of life and interactions among organisms (biological diversity) make the Earth rich of different genes (genetic diversity), species (species diversity), ecosystems (ecosystem diversity) and landscapes
- in an economic system, the variety of productive models, situations and cultures are at the basis of competitive advantages (Porter M., 1991), innovation and diversification (e.g. products, services, processes, markets, organisations, local development and employment), stimulated by the capacity to invent, research and implement new individual and social behaviours and styles of life (OECD, 1993)

Human beings have to be fully aware of a basic natural law: high diversity makes a system more stable and less vulnerable to internal and external shocks and disturbances. In other words diversity is a key factor for unity, as well as the definition of unity mirrors that of diversity.

“The concept of diversity encompasses acceptance and respect. It means understanding that each individual is unique, and recognizing our individual differences. These can be along the dimensions of race, ethnicity, gender, sexual orientation, socio-economic status, age, physical abilities, religious beliefs, political beliefs, or other ideologies. It is the exploration of these differences in a safe, positive, and nurturing environment. It is about understanding each other and moving beyond simple tolerance to embracing and celebrating the rich dimensions of diversity contained within each individual.”

ASUO (Associated Students of the University of Oregon) – Multicultural Centre, 1999;
<http://gladstone.uoregon.edu/~asuomca/diversityinit/definition.html>

Unity is the way for channelling energies in all kinds of system.

If a system is managed to allow diversities to work together harmoniously, they will produce effects and results greater than the sum of the parts (synergy).

If a system is not well managed hampering diversities to work together harmoniously, they will produce effects and results smaller than the sum of the parts (dysergy, from dysergia that means deficient co-ordination) as well as disorder and loss of energy (entropy).

Unity is a natural dynamics that turns into separation and conflict when a system is wrongly managed, reducing fair relationships among its parts, lessening opportunities for and discriminating against some of them (that is excluding components from active “system citizenship”). In fact:

- environmental dynamics do not have boundaries
- no country can see itself as separated from the general performance of nature
- economic competition requires cooperation and integration of different elements, rather than the homologation of similar elements
- globalisation of markets, institutions and styles of life is based on a world wide civilising process based on multi-dimensional integration between different local cultures (current, from the past and oriented towards the future) yet conflicting because of disequilibria in powers and in the capacity to access (accessibility) to the available resources (Morin E., 1993)
- single actors play a central role because of the interdependences that make up systems (environmental, human, social, economic, etc.) within local and global processes
- risk and vulnerability are no more limited to individual activity but they potentially spread outside the individual sphere of control, threatening the survival of humanity or jeopardising large numbers of the population, natural environment, etc. (Giddens A., 1990)

The motto “More unity and more diversity” is at the basis of the European Union enlargement: “An EU of 25 will create new relationships with its neighbours and the wider world” (EC, DG for Press and Communication, 2003).

Similarly in the Preamble of the Draft Treaty establishing a Constitution for Europe is written that:

“(…) while remaining proud of their own national identities and history, the peoples of Europe are determined to transcend their ancient divisions and, united ever more closely, to forge a common destiny,”

“(…) “united in its diversity”, Europe offers them the best chance of pursuing, with due regard for the rights of each individual and in awareness of their responsibilities towards future generations and the Earth, the great venture which makes of it a special area of human hope”

System Dynamics

Everything is connected. Diversities are mixed. Human beings are in a dependent alliance with the other components of nature. Both local and global perspectives are relevant and simultaneous to unite what happens, happened and will happen here and there, now, yesterday and tomorrow.

Looking at ecological dynamics, a system evolution is more and more characterised by non-equilibrium situations, in which a coherent organism (ecosystem) identified as a “whole” (see the Gaia theory of Lovelock J. E., 1979) changes its form and functions in relation to the temporal and spatial variations in the continuous exchange of energy, matter and information with its environment (Koestler A., 1967).

In a system, changes happen continuously being both slow (day-by-day process) and fast (unpredictable and abrupt processes). Even though expressing different characteristics, these changes closely interact as it is well analysed by disciplines concerning organisations. The terms *Kayzen* and *Kairyo* are for instance used in the approach on Total Quality Management to define respectively slow and fast changes.

In a system there is in fact a process of nesting a part in a successive whole that is also part of a more encompassing whole (Wilber K., 1995). This property makes it possible that a change in any part affects other parts and the whole, as well as vice versa. What is a minor change here can become a relevant modification there and on the whole (see the Lorenz’s butterfly effect presented in 1972). In this process there is not a deterministic cause-effect direction but an intertwined dynamics of mutual influence: the cause becomes an effect while the effect becomes a cause. Within this dynamics it becomes useless and meaningless to identify both of them in a separate way.

This recursive dynamics makes also isolation to be an aspect of embedded relationships and vice versa. In other words, a system (or part) cannot be isolated from the others. Even though attempts can be made in this sense, isolation is an apparent state as well as a temporary situation.

A community can for instance decide to exclude some of its components, or to protect itself from new entries, but the system wider complexity and the convolution of interwoven evident and hidden relationships will create, sooner or later, open ended conditions both through consensus and conflict.

Consensus and conflicts intertwine in negotiation and co-decision processes. These processes are better performed by human beings when they recognise and take into account different interests and points of view.

This means that individuals and social communities are carefully considered as actors with specific (and different) needs and capabilities to be involved in decision making. The term “target group” is used in different policy fields to foster a client orientation in strategies and actions. The client-centrality is moreover one of the basic principles promoted by the approach on Total Quality Management.

Client orientation, negotiation and co-decision processes develop subsidiarity, partnership, networking and participation.

Participation is nourished by “learning and knowing” and vice versa.

Knowledge is an unlimited and open-ended process nourished by a positive utilisation of uncertainty.

Uncertainty is a key-lever for knowledge development as demonstrated by many scientists (e.g. Bachelard, Piaget, Popper, Kuhn, Morin, Prigogine, Nicolescu, Bateson, Deridda) while deterministic certainty leads to a reductionism attitude aimed at transforming what is complex in a simple set of definitions, rules and procedures, quantifying them through the elimination of what is not yet quantifiable and measurable, of what is not yet understandable by the available human cognitive maps.

Looking at an ecosystem, the properties of a nested system can be easily perceived in terms of iterative processes based on evolving complexity and dialogical (connecting capacity) attitude, thus the ecosystem functioning cannot be described only by a detailed study of its units but by more holistic approaches.

Enhancing problem understanding is a key lever to improve knowledge but there is need to put together different perceptions, parts and aspects of the phenomenon under consideration. Therefore there is an avoidable necessity to connect different opinions, disciplines and policy fields. Problem understanding can be enhanced if systems are opened both inside (intra – openness) and outside (inter – openness). This means that organisational behaviour, institutional and corporate cultures are influenced by and influence the degree and intensity of collaboration between different systems (both individuals and social communities).

Collaboration and mutual understanding are developed by and favour an open collective learning, being simultaneously an individual and social process.

Human mind is an ecologically interdependent system that connects cultures, disciplines and approaches (Bateson G., 1972) allowing concepts to co-evolve according to changes in assumptions, rules, points of views determined by individuals and because of the unavoidable interrelationships between them.

Human mind is the actor of an ongoing process of paradigm changes (Kuhn T. S., 1962) that makes it possible to acknowledge the scientific knowledge as provisional (Bateson G., 1979), and science as a continuous attempt to “falsify” or “refute” theories, concepts, approaches and methods, instead of seeing its aim in the ideological discovery of the “truth” (Popper K., 1959).

Problem understanding and open collective learning allow human beings to create a shared vision of development, "knowing what needs to happen" (Senge P. et al., 1994), "accepting the intellectual challenge of creating the future" (Smith N. I., 1994).

Change is in fact based on the combination of vision and missions (Senge P. et al., 1994; Smith N. I., 1994; Hammer M., Champy J., 1994; Gouillart F. J., Kelly J. N., 1995; Elkington J., 1997).

Vision is a clear image of what the future should look like (‘where we want to go’, ‘what we will be like when we get there’).

Vision provides clarity of purpose to the organisation’s missions (‘why it exists?, ‘what it is meant to be involved in and with’, ‘how we operate, on a day-by-day basis, to pursue our vision’) giving a sense of commitment to all its components (‘what are we here to do together’), communicate a sense of what the organisation is like, how it is going to operate, what results it must achieve.

Shared visions allow concreteness, flexible goals and expected results in order to take the organisation closer and to revise instantaneously plans in such a way as to tightly meet the missions.

In other words, without vision and missions there is not “result-orientations” and vice versa.

Result orientation is another lever of change both for learning and for making responsibility more operational. If objectives are formulated in terms of concrete results and effects, they can be monitored, evaluated and revised when necessary according to achievements and difficulties.

Summary

This Chapter is devoted to the complex nature of living systems, taking into account concepts that concern the “How” and “When” of the Sustainable Life Development (SLD) approach.

Both the definitions of these specific concepts and the answers to two key questions are summarised here below.

Key definitions

System is the globally organised unity of interrelationships between elements, actions or individuals, having the capacity to be simultaneously a nest and to be nested in other systems through the natural property of remaining dynamically open ended.

Entrepreneurial system is the fabric of companies that co-operate, compete, conflict and ally themselves with one another at the same time, constituting evolutionary and self-regulating interactions within and across their network boundaries in multiple and multidirectional trajectories nurtured by self-learning processes, open access to and exchange of knowledge and information.

Territorial system is the open network of differently nested systems (governments, citizens, families, associations, groups of interests) that evolve by means of mutually determined developmental actions corresponding to different cycles of life (human, non-human, etc.) and spatial dimensions (larger or smaller according to the scope of activity of the components).

Knowledge system is the autonomous sphere of ideas, concepts, theories and cultures, cultivated by the human mind and influencing the patterns of behaviour through which the human beings interact with their life, the nature and the Universe.

Participatory system is the system where the whole of human beings is legitimised to take part in its activities, actions and development at whatever level it may be through interrelationships that favour an active citizenship, mutual trust, knowledge sharing, co-evolution and self-organising capacity.

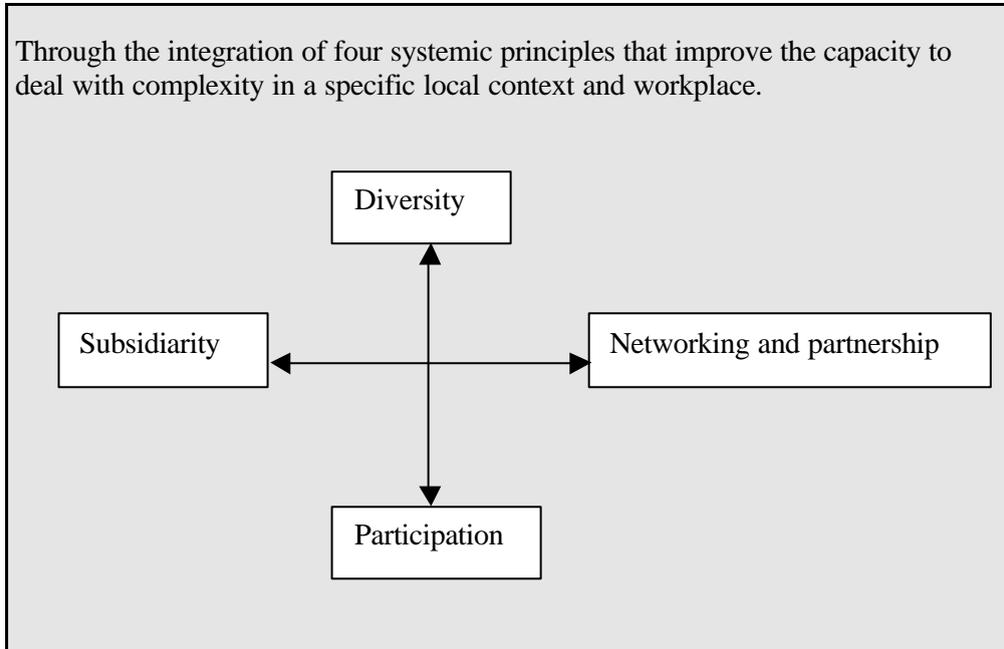
Holistic system is the co-evolving and self-organising system where the whole of diversities (human, environmental and economic) can work together harmoniously (unity) producing effects and results greater than the sum of the parts (synergy) while maintaining open relationships with other systems.

System dynamics is both a process and a capacity of complex systems to connect space (local and global) and time (past, present and future) perspectives while co-evolving through iterative non-equilibrium situations where change in any part affects other parts and the whole, as well as vice versa.

Key questions

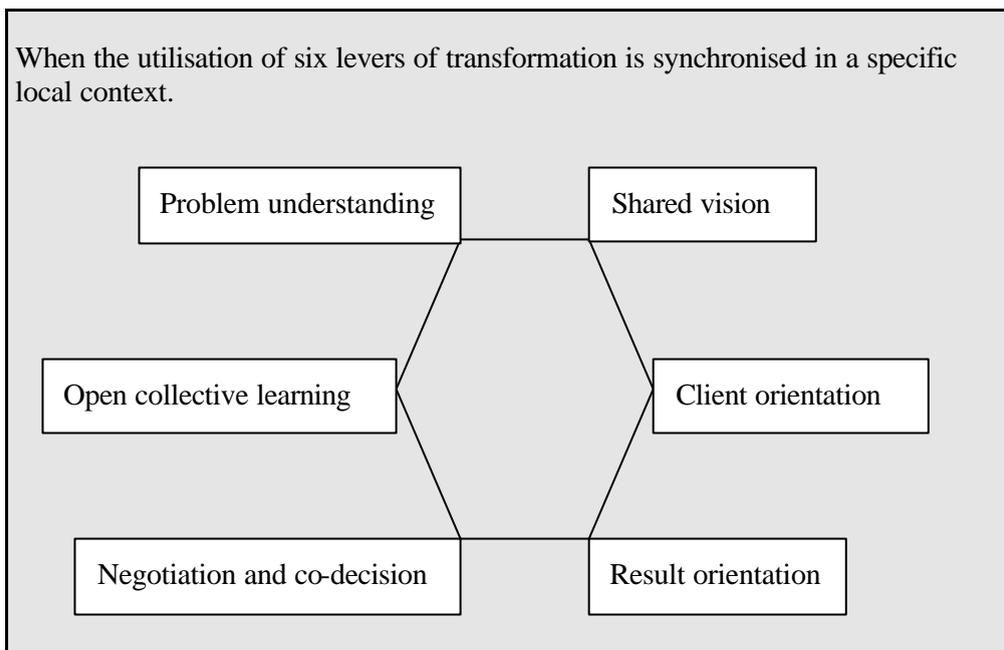
The third key question for a SLD project is:

How to deal with different actors, problems, conditions, levels and dimensions of decision making in order to carry out plans based on the Sustainable Life Development (SLD) approach?



The fourth key question for a SLD project is:

When is possible to anticipate, produce and manage change in complex systems to favour sustainable styles of life?



The answers to the “How” and “When” of the Sustainable Life Development (SLD) approach address the courses of action to be performed towards:

- co-evolution and self-organisation capabilities within and between territorial and corporate systems, while determining a dynamic equilibrium that affect components and interrelationships through the integration of four systemic principles
- mutual co-operation between territorial systems through six levers of transformation that utilise the driving energies embedded both inside the concerned components and within their subtle and strong interrelationships

Having clarified the “What and Why” (Chapter 1) and the “How and When” (Chapter 2) of the SLD approach, a final question need to be still answered and it concerns “Who” are the components that allow a territorial system to move towards the concepts taken into consideration so far?

The following Chapter is totally dedicated to answer this question.

CHAPTER 3: GOVERNANCE

Introduction

The Sustainable Life Development (SLD) approach adopts the definition of “governance” as an overarching process in which interrelationships within and between nested systems (e.g. a territory, a local community and a company) allow human beings to cope with and solve problems innovating styles of life, production and consumption.

This concept of Governance strictly relates to that of system (see Chapter 2) and accompanies the SLD operational phases concerning the integration of strategies between:

- territorial systems, where the Local Context Analysis (LCA) results in the elaboration of territorial “Action Plans”
- entrepreneurial systems, where the Workplace Analysis (WA) results in the elaboration of business “Pilot Initiatives”

The following paragraphs present basic definitions concerning:

- Social Potential
- Civil Society
- Empowerment in territorial and entrepreneurial systems

Social Potential

Social Potential is a whole of characteristics (key factors) that nourishes the capacity of human beings to deal with problems, anticipating and managing change. This capacity evolves together with the quality of interrelationships:

- in a territorial system, between governments, social movements, mutual support associations, informal and formal networks (pro and anti interest groups, profit and not profit sectors, and so on)
- in an entrepreneurial system, between management and employees, trade unions and other stakeholders (e.g. clients, suppliers, local authorities and communities, and so on)

“Governance is a broader concept than government and it refers to the process that involves formal institutions and those of the so-called civil society. Institutions are the expression of public authorities (governments), civil society is the social fabric constituted by a multiplicity of units territorially created by the citizens” (definition given by "The Governance Working Group" of the International Institute of Administrative Sciences in 1996).

The quality of these interrelationships is determined by the human beings and influences their values, behaviours and actions.

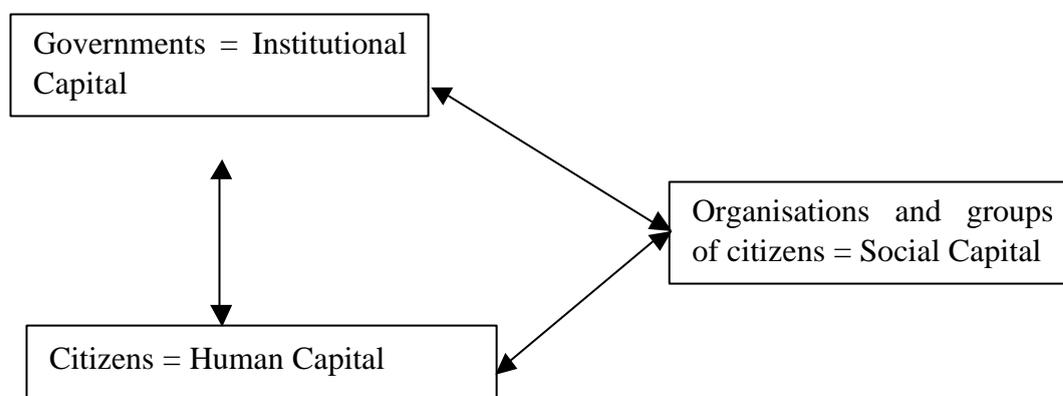
Interrelationships in fact can be open and inclusive to the extent that they ensure mutual trust, respect and solidarity among the components of a system, intensity and stability of collaboration among them, legitimacy of different points of view and perspectives of the people, taking them into account in the decision-making process.

On the contrary, interrelationships can be closed, passive, mistrusting, conflicting, unstable, weak and restricted when components of the system and, consequently issues and interests (e.g. economic, socio-cultural and environmental) are underrepresented in or excluded from the decisions concerning a specific system (spatial dimension) and in a specific period of time (in the past, currently or in the future).

Of course all the above-mentioned features are naturally merged, they influence each other, are children of the same parents (the human beings) but the quality of the concerned systems depends on the mainstreaming direction: towards openness and inclusion or towards restriction and exclusion.

Governance and self-governance (Osborne D. and Gaebler T., 1992; Commonwealth Foundation, 1999; CEC, 2001b) are acknowledged to be of a paramount importance in the processes towards sustainable development, for instance in the Local Agenda 21 initiatives (Warburton D., 1998; Knowles E., 1999; Satterthwaite D., 1999; Malini M. and Jørgesen A. M., 1997; Erdmenger C., Burzacchini A., Levett R., 2000; Erdmenger C., 1998).

The Governance processes are based on interwoven relationships between key factors that constitute the Social Potential and can be distinguished in terms of Institutional, Human and Social Capitals, according to the recent literature on sustainable development (e.g. Smith D., Sippert N. and Emmert J., 2002).



Institutional Capital is constituted by decision-making processes, organisational capacity, support, services and resources, provided by the institutions that operate at whatever level of a social community.

Human Capital consists of individually possessed knowledge, skills and competencies acquired through learning, experiences, attitudes and values widely shared within a specific local context and transmitted from generation to generation with respect to the creation of social, cultural, economic and environmental well-being. (OECD, 2001). Human Capital is, therefore, the "energy" of the socio-cultural and economic system in a locally determined context and within a global (world) perspective.

Social Capital is produced through human capital; is a "relational capital" rather than being the property of any one individual; it is a public good that is shared by the community that creates and utilise it; it involves the values and the behaviours of the civil society and relies upon the potential and the capacity of the human beings; it consists of mutual trust and benefit, community participation, co-ordination and co-operation, developed through formal and informal networks, social organizations, norms, and so on. (OECD, 2001).

Alexis de Tocqueville (1838) used the expression "art of association" anticipating the concept of social capital and looking at a democratic society. This "art" is nowadays identified in the capacity to weave fair interrelationships between individuals and groups.

Social Capital is currently understood (Lang R. E. and Hornurg S. P., 1998; Fukuyama F., 1995, 1999; Putnam R. D., 1993, 2000; Ladd E. C., 1999; Dionne E. J., 1998) as energetic resource determined by trust, collaboration and mutual interactions between individuals, generally manifested in nested networks (from family to trade unions, trade associations, political, religious, socio-cultural, environmentalist and so on organisations).

The quality of the social capital involves the values and the behaviours of the civil society and, all together, rely upon the potential and the capacity of the human beings. Bridges and glue are the components of social capital. Their properties reflect those of their mutual relationships and vice versa.

For instance, the structured non-governmental organisations of citizens act as social bridges; the citizens themselves act as the social glue. Together they nurture the complexity of relationships but relationships in their turn feed both the above-mentioned components.

Facilitators are catalyst of this process. For instance both at a territorial and company levels, local development agencies and agents, trade associations, trade unions, associations of consumers, environmentalists, representatives of local communities and son on can facilitate interactions between several components (local authorities, planners, experts, managers and employees, suppliers and households, etc.) through a knowledge flow that allows capacity building and quality improvement.

Civil society

Mahatma Gandhi (Fisher L., 1982) wrote that "No society can possibly be built on a denial of individual freedom", while reason and openness are at the basis of the mutual social relationship. Following Hindu philosophy and tradition, he thought that self-government could be not obtained without self-control for the individual. In his opinion, personal morals and (individual and collective) ethics were the roots of change. He wrote, "swaraj is a sacred word, meaning self-rule and self-restraint, not freedom from all restraint which 'independence' often means"; thus he stressed the need for individual commitment, action and personal change (Ranchor P., 1994; Gandhi M. K., 1982).

Alexis De Tocqueville (1838) observed that citizens respect laws, which they help to create and administer. He argued against "the partisans of centralisation" who "are wont to maintain that the Government directs the affairs of each locality better than the citizens could do it for themselves; this may be true when the central power is enlightened, and when the local districts are ignorant; when it is as alert as they are slow; when it is accustomed to act, and they to obey" (...) "But I deny that such is the case when the people are as enlightened, awake to their interests, and accustomed to reflect on them" (...) "I am persuaded, on the contrary, that in this case the collective strength of the citizens will always conduce more efficaciously to the public welfare than the authority of the Government."

The United Nations (CSOPP, 2000) put the civil society at the centre of the policy mainstreaming, underlining the following basic elements of Governance:

Governance	
<i>Political Authority</i>	<i>Public Management</i>
<ul style="list-style-type: none"> ▪ Political Legitimacy ▪ Democratic participation ▪ Empowerment ▪ Inclusiveness in shaping public affairs 	<ul style="list-style-type: none"> ▪ Transparent public administration and policy management ▪ Accountable public service ▪ Effective implementation of public policies

Civil society:

- consists of "the groups and organisations, both formal and informal, which act independently of the state and market to promote diverse interests in society". (World Bank, 2002)
- includes trade unions and employers' organisations (social partners), non-governmental organisations, professional associations, charities, grass-roots organisations, organisations that involve citizens in local and municipal life (EU White Paper, CEC 2001b).
- embraces the notions of social movements and implies conflicts and agreements, diversity and negotiation, the merging of constitutions, legislations, executive and judiciary powers, legitimacy, representativeness, transparency, accountability and efficiency
- is always understood as dynamics strictly related to citizenship, rights and duties, subsidiarity and participation in the decision-making (Seligman A., 1992; Fukuyama F., 1999; CSOPP, 2000)

"No civil society, no democracy" (Gellner E., 1994), that is the *sine qua non* of "good governance".

Absolute truth and dogma are incompatible with Democracy, which is relativistic given that its aims and values depend on who champions them and their variety is equally legitimised within universally recognised principles (Zagrebelsky G., 2005).

Democracy (Morin E., 1993):

- presupposes and nourishes diversity of interests, social groups and ideas acknowledging the rights of minorities and heretic and deviant ideas to exist and to be freely expressed
- is simultaneously consensus and conflicts within basic rules of participation that avoid violence in favour of vital and useful battles between ideas and values

The five principles of European Governance (CEC, 2001b)

- Openness; institutions should work in a more open manner and they should be nearer to the citizens
- Participation; quality, relevance and effectiveness of policies depend on ensuring wide participation throughout the policy chain, from conception to implementation, following an inclusive approach
- Accountability; roles and responsibilities need to be clearer at whatever level decisions are taken and implemented
- Effectiveness; policies must be effective and timely, delivering what is needed on the basis of clear objectives, an evaluation of future impact and, where available, of past experience
- Coherence; policies and actions must be coherent and easily understood to ensure a consistent approach (economic, environmental and socio-cultural) within a complex system (e.g. diversity, climate and demographic changes) and through strong responsibility on the part of the institutions (e.g. involvement of regional and local authorities)

Governance is influenced by strategic choices: Who are the stakeholders excluded from the decision-making table? Why? Which methods and procedures can facilitate an effective participation?

Positive answers, in the sense of inclusion and participation choices, contribute to the empowerment of the local actors and communities, building their capacity to conceive and implement development strategies and plans, both at a territorial and entrepreneurial level. "It is beginning to be recognised that community is neither the 'end' nor the 'means' of a process of development or participation, it is creating something new which is based partly in people's memories, real or imagined, and partly in future visions of society" (Warburton D., 1998).

"We have to combine the basic notion of sustainability rightly championed by Brundtland, Solow and others, with a broader view of human beings" writes Amartya Sen, adding that "What role, then, should citizenship play in environmental policy? First, it must involve the ability to think, value and act, and this requires that we think of human beings as agents, rather than merely as patients (...) Second, among the opportunities that we have reason to value is the freedom to participate (...) Third, if environmental objectives are pursued by means of procedures that intrude into people's private lives, the consequent loss of freedom must count as an immediate loss (...) Fourth, the conventional focus on overall living standards is too aggregative to pay adequate attention to the importance of specific freedoms (...) The relevance of citizenship and of social participation is not just instrumental. They are integral parts of what we have reason to preserve" (Sen A., 2004).

The involved stakeholders, according to their capacity to imagine and see the future pictures of the local contexts, depicting the related constitutive features, can open different paths of development. This capacity requires the support of a management framework devoted to increasing quality.

Empowerment in territorial systems

Local actors and communities can be *empowered* to autonomously organise themselves and to evolve together cultivating mutual relationships.

Empowerment is both a capacity building process and an outcome. It is a process through which power is gained by and given to people, individuals, their communities and societies. It is an outcome constituted by increasing opportunities and capacity of individuals and organisations to actively decide on and “control over their own lives in their community and larger society” (Wallerstein N. and Berstein E., 1988).

Empowerment is a multi-dimensional concept, outcome and social process concerning many disciplines and policy fields, e.g. individual and community development, psychology, education, economics, social movements, institutions and organizations (families, enterprises, groups, associations, public authorities, private bodies, the State itself and so on).

Empowerment is a basic concept of a society based on democracy, human and civil rights, the overcoming of social, economic, cultural and environmental disequilibria, eradication of gender, ethnic and religious discriminations, decentralisation and autonomy in decision making processes, individual and collective responsibilities.

Empowerment acquired an universal importance as the following examples explain:

- the UN World Conference on Women (Beijing 1995) where the mainstreaming of women’s empowerment was promoted in all policy fields

“Women’s empowerment is thus the process, and the outcome of the process, by which women gain greater control over material and intellectual resources, and challenge the ideology of patriarchy and the gender-based discrimination against women in all the institutions and structures of society.”

“Women's empowerment should thus lead to a world where women - and the `new men' - ensure that resources are utilized not just equitably, but sanely and safely; where war and violence will be eliminated, and our earth restored to a clean, green place for the coming generations.”

Srilatha Batliwala (1995): Education for Women's Empowerment, ASPBAE Position Paper for the Fourth World Conference on Women, Beijing, September 1995, New Delhi, Asia-South Pacific Bureau of Adult Education.

- several programmes to favour disadvantaged groups, communities and territorial areas, for instance the United Nation Human Development Programme, the European Union social cohesion and inclusion strategies, and so on

- the sustainable development strategies decided both at worldwide (UN Summits in Rio – 1992 and Johannesburg - 2002) and European dimensions (EU, Gothenburg strategy - 2001)

Empowering communities (from Agenda 21, Chapter 3 – Combating Poverty, Rio 1992)

Sustainable development must be achieved at every level of society. Peoples' organizations, women's groups and non-governmental organizations are important sources of innovation and action at the local level and have a strong interest and proven ability to promote sustainable livelihoods. Governments, in cooperation with appropriate international and non-governmental organizations, should support a community-driven approach to sustainability, which would include, *inter alia*:

- Empowering women through full participation in decision-making
- Respecting the cultural integrity and the rights of indigenous people and their communities
- Promoting or establishing grass-roots mechanisms to allow for the sharing of experience and knowledge between communities
- Giving communities a large measure of participation in the sustainable management and protection of the local natural resources in order to enhance their productive capacity
- Establishing a network of community-based learning centres for capacity-building and sustainable development

Empowering women (from the Johannesburg Declaration on Sustainable Development, 2002)

1. We, the representatives of the peoples of the world, assembled at the World Summit on Sustainable Development in Johannesburg, South Africa, from 2 to 4 September 2002, reaffirm our commitment to sustainable development.

20. We are committed to ensuring that women's empowerment, emancipation and gender equality are integrated in all the activities encompassed within Agenda 21, the Millennium development goals and the Plan of Implementation of the Summit.

Empowerment in entrepreneurial systems

“A company is not a machine but a living organism, and, much like an individual, it can have a collective sense of identity and fundamental purpose. This is the organisational equivalent of self knowledge - a shared understanding of what the company stands for, where it's going, what kind of world it wants to live in, and, most importantly, how it intends to make that world a reality” (Nonaka I., 1991).

The well-being of people and the eco-systems in which they live underline the necessity for the entrepreneurial culture to move from profit-oriented actions to a stakeholders approach.

This approach to corporate governance builds upon a wide debate and literature which initiated several decades ago (e.g. Friedman M., 1962; Schumacher E. F., 1973) and progressively has included empowerment as a key concept of the Total Quality Management (TQM).

Empowerment in businesses and organisations requires in a general manner: trust, responsibility, participation, harmony and group affiliation, delegation of responsibility to the lowest levels, ownership, motivation and satisfaction.

Organisational behaviour is characterised by a continuous and inextricable flow of micro and macro decisions to solve problems and cope with the entrepreneurial risk. This dynamics does not respond only to formalised roles within an organisation but above all to roles perceived by the concerned individuals and attributed by their social communities (team, department, branch, etc.). This dynamics was firstly demonstrated by Mayo, Lewin and other theorists of the mid-twentieth century (e.g. the Hawthorne studies, the Human Relations school) revealing that employee participation is a key factor of the organisations' life.

The concept of empowerment is based on the above mentioned dynamics arriving at a clear orientation towards responsibility and autonomy, self-direction, work motivation, collective sense of identity, self knowledge, self-realisation.

Empowerment can be fostered by organisations and corporate structures that are learning, lean, flat, decentralised, fractal, adaptive, multidimensional, dialogical, gender balanced living systems (Ansoff I., 1987; Mullins L., 1993; Drucker P., 1993; Pasmore W., 1994; Gouillart F. and Kelly J., 1995; Hammer M. and Champy J., 1994; Senge P. et al., 1994, 1999; George S. and Weimerskirch A., 1994; Peters T., 1994; Garrat B., 1994; Beckford J., 1998, Handy 1993, 1994).

“Empowerment is also about values. It is about treating people in a different way. It involves seeing people as whole human beings with their own hopes and fears, their own aspirations and their own lives outside the workplace. Empowered people are treated with respect. Their views are heeded. Their talents are used. They are treated fairly, praised for work well done and criticised constructively. They are prepared to work wholeheartedly with others in a worthwhile enterprise” (Johnson R. and Redmond D., 1998).

“It is common to hear that people in organisations resist change. In reality, people do not resist change; they resist having change imposed on them. Being alive, individuals and their communities are both stable and subject to change and development, but their natural change processes are very different from the organisational changes designed by ‘re-engineering’ experts and managed from the top” (Capra F., 2003).

With the diffusion of the sustainable development concepts, also *corporate governance* opened its view to a broader range of stakeholders looking at interests and needs that were ignored or refused before, such as those of the civil society and of the so-called "stakeholders without voice", namely the natural environment, the non-human species and the future generations, unable to speak for themselves (Wheeler D., Sillanpää M., 1997).

Summary

This Chapter is devoted to the Governance of a complex territorial system, taking into account concepts that concern the “Who” of the Sustainable Life Development (SLD) approach.

Both the definitions of these specific concepts and the answer to key question are summarised here below.

Key definitions

Social Potential is a whole of characteristics that nourishes the capacity of human beings to deal with problems, anticipating and managing change. A series of key factors constitute the Social Potential and can be distinguished in terms of Institutional, Human and Social Capitals.

Civil Society includes trade unions and employers’ organisations (social partners), non-governmental organisations, professional associations, charities, grass-roots organisations, organisations that involve citizens in local and municipal life.

Empowerment is both a capacity building process and an outcome. It is a process in terms of power gained by and given to people, individuals, their communities and societies. It is an outcome in terms of increasing opportunities and capacity to actively decide on and control over living conditions and quality of life.

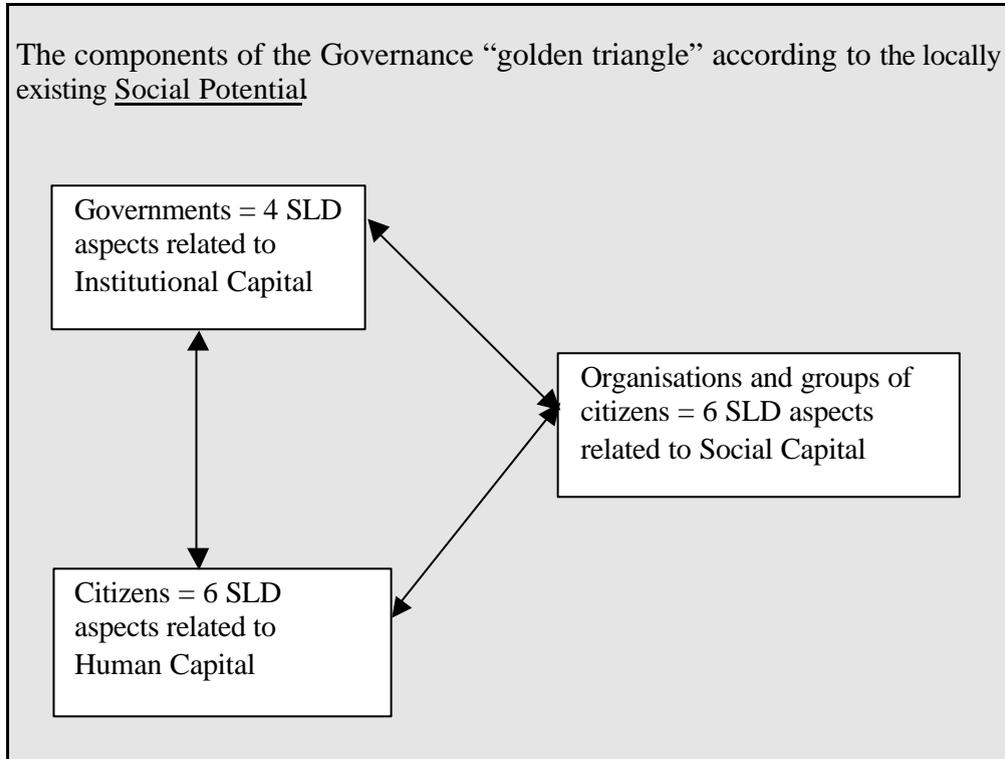
Empowerment in territorial systems requires a society based on democracy, human and civil rights, the overcoming of social, economic, cultural and environmental disequilibria, eradication of gender, ethnic and religious discriminations, decentralisation and autonomy in decision making processes, individual and collective responsibilities.

Empowerment in entrepreneurial systems requires trust, responsibility, work motivation and satisfaction, collective sense of identity, participation, delegation of responsibility, autonomy, self-direction, self knowledge, self-realisation.

Key questions

The fifth key question for a SLD project is:

Who should be empowered and involved in decision making processes devoted to carry out plans based on the Sustainable Life Development (SLD) approach?



The answers to the “Who” of the Sustainable Life Development (SLD) approach address the courses of action to be implemented in a local context towards sixteen aspects that favour capacity building and empowerment of its components.

Four aspects (or key factors) of Social Potential concern the quality of Institutional Capital:

Competence distribution for strategic decision making
Budget autonomy to support strategic decision making
Fair interactions
Access to information, dialogue and debate

Six aspects (or key factors) of Social Potential concern the quality of Human Capital:

Perception of a variety of development approaches
Entrepreneurial creativity and innovation
Capacity to cope with complexity and to anticipate change
Employability
Reliance on one's own resources without compromising those of others
Integration of social and technical skills for innovation process

Six aspects (or key factors) of Social Potential concern the quality of Social Capital:

Local knowledge for diversification processes
Multicultural cohesion to enhance local development
Social cohesion
Mobilisation of all actors
Shared value system
Shared visions of development

The fifth question (Who) completes the conceptual structure of the SLD approach while asking for making it possible that opportunities are provided in an equitable way to the actors of the Governance “golden triangle”.

The following Chapter examines that issue more in depth.

CHAPTER 4: EQUAL OPPORTUNITIES

Introduction

The Sustainable Life Development (SLD) approach adopts the definition of “equal opportunities” as a system of proactive measures to be applied to all fields (particularly economic, social, cultural and family life) and aimed at integrating age and gender management, employment and social inclusion policies, flexibility and security with a specific attention to the most vulnerable persons and social groups.

The equal opportunities’ system consists of appropriate courses of action to combat discrimination based on gender, racial or ethnic origin, religion or belief, disability, age, sexual orientation.

The Charter of Fundamental Rights of the European Union (adopted in 2000) includes Chapter III "Equality" that establishes (Art. 20 – 26) the principles and rights of:

- non-discrimination
- equality between men and women
- cultural, religious and linguistic diversity
- children, the elderly and persons with disabilities

The Charter is incorporated in the EU Draft Treaty concerning a Constitution for Europe, explicitly adds the principles of equality and non-discrimination to the values (Art. 2), objectives (Art. 3) and democratic life (Art. 44) on which the Union should be founded.

Equal opportunities constitute an integral part of the challenge of sustainable development (see Chapter 1) and influence all the SLD operational phases given that:

- a network of structures, mechanisms and processes have to be put in place within comprehensive territorial “Action Plans”
- all areas of the work organisation have to be analysed to evaluate, guide, plan and monitor business “Pilot Initiatives”
- Action Plans and Pilot Initiatives have to be nested

The following paragraphs present basic definitions concerning:

- Age and gender management
- Employment
- Social inclusion
- Flexicurity towards a sustainable life

Age and gender management

Population and age management are key aspects of Sustainable Development as the processes by which the present generations satisfy their needs and improve their quality of life without compromising the ability of future generations to meet their own needs.

As already highlighted (see Chapter 1) the principles of equity (between persons, territories and generations) are embedded into the concept of sustainable development in order to improve the ability of human being to wisely access (accessibility) and use the natural resources in terms of fair opportunities for all the Planet citizens.

The risk of an overstocked Earth unable to support its population was present since the beginning of many civilisations (Harrison P., 1993), for instance some thinkers:

- considered it necessary for life to balance population and resources in their cities; Plato was in favour of a zero population growth and Aristotle stated that a populous city was very hard to govern
- believed that humankind was capable of continuous improvement and happiness (i.e. Godwin and Condorcet) and Wallace (1761) recommended equality, raising criticisms and objections since if equality were to be the remedy to distress and selfishness, it would foster population increase
- were convinced that the natural tendency of population to expand faster and increasingly more than resources would have been limited by the scarcity and insufficiency of the latter (i.e. the “principle of population” elaborated by Malthus, 1798); therefore, every attempt to remedy poverty by increasing resources inevitably would have been unsuccessful, since a further growth of population makes the resources insufficient for the life of the newcomers
- declared that economic growth would end in a static population level because of the ‘niggardly nature’ of nature which constitutes a factor of production and a source of life and wealth (i.e. the concept of “stationary state” elaborated by J. S. Mill, 1857)
- argued that not population growth, but the ways in which the economy and society are organised were the causes of poverty (e.g. Karl Marx)

Although answers are neither simple nor complete, the current worldwide strategy on Sustainable Development is fully aware that holistic knowledge and approaches, more than reductionism models, are necessary to manage complex systems (see Chapter 2) and face the challenge of an increasing population and the associated demography changing, namely:

- even though the fertility rate differentiates the Earth regions, the global population is expected to increase from the current nearly 6,5 billion inhabitants to 9 billion in 2050

“The Union’s population is set to grow just slightly up until 2025, thanks to immigration, before starting to drop: 458 million in 2005, 469.5 million in 2025 (+ 2%), then 468.7 million in 2030. Yet 55 of the 211 regions of the EU-15 already saw a fall in population during the second half of the 1990s. This is also the case in most of the regions of the new Member States (35 out of 55 regions), because of natural decrease and net emigration” (CEC, 2005a)..

- some countries are getting older much faster than others and, by contrast, an increase in young population is expected in other countries

Key questions of the European Union Green Paper *Confronting demographic change: a new solidarity between the generations* (COM(2005) 94)

The challenge of a low birth rate

- How can a better work/life balance help to tackle the problems associated with demographic ageing?
- How can a more balanced distribution of household and family tasks between men and women be encouraged?
- Should the award of certain benefits or advantages (leave, etc.) be linked to an equal distribution of tasks between the sexes? How best to ensure an adequate income for both parents on parental leave?
- How can the availability of child care structures (crèches, nursery schools, etc.) and elderly care structures be improved by the public and private sectors?
- Can a reduced rate of VAT contribute to the development of care services?
- How can parents, in particular young parents, be encouraged to enter the labour market, have the career that they want and the number of children they want?

Better integration of young people

- How can Community policies contribute more to combating child poverty and poverty among single-parent families and to reducing the risk of poverty and exclusion among young people?
- How can initial training and adult training schemes be improved? What can non-formal education and voluntary activities contribute? How can the structural funds and the instruments for achieving better access to the knowledge society contribute?
- How can the bridges between school and working life and the quality of young people's employment be improved? What role should social dialogue play? What can dialogue with civil society, in particular youth organisations, contribute?
- What forms of solidarity can be fostered between young people and elderly people?

- over the long term, some countries would have to increase immigration to make up for their low fertility rates (e.g. Japan, European Union) and, vice versa, other countries would have to increase emigration because of lack of available natural and economic resources (e.g. India, Mexico, South America, Africa, Middle Eastern, Asian countries, China included)

Key questions of the European Union Green Paper *Confronting demographic change: a new solidarity between the generations* (COM(2005) 94)

The possible contribution of immigration

- To what extent can immigration mitigate certain negative effects of demographic ageing?
- What policies should be developed for better integrating these migrants, in particular young people?
- How could Community instruments, in particular the legislative framework to combat discrimination, the structural funds and the Employment Strategy, contribute?

- population size, human-made technologies, human styles of production and consumption, have impacts on the environment, which is the living source of the Planet

- people in developed countries have the greatest impact on the global environment (e.g. the 20% of the population in the developed countries consumes 80% of the Earth's resources and produce 80% of all waste and pollution) and if their styles of life are imitated by the developing countries, the environmental impacts consequences of population growth will be amplified (e.g. three planet Earths would be needed today and six for the year 2100, according to estimate based on the “Ecological Footprint” system)

Age management has become a central issue in all developed countries, especially in Europe.

Until the ageing worker phenomenon did not reach the relatively recent awareness and concerns on the risk of an unbalanced demographic growth, until statistical figures and projections did not demonstrate the impending risk of increasing public spending and financial deficit due to pensions, social and health services' expenditure, the working life expectations have been a matter of labour bargaining and regulations.

The Sustainable Development Indicators (SDI, Eurostat) underline that the “old-age-dependency ratio” (that is the ratio between the total number of persons aged 65 and over and the number of persons aged 15 – 64) will increase, for instance, in:

- European Union (25 countries) from 23,4 in 2000 to 26,3 in 2010, 32,1 in 2020 and 52,8 in 2050
- Spain from 24,5 in 2000 to 25,4 in 2010, 30 in 2020 and 67,5 in 2050
- Italy from 26,8 in 2000 to 31,3 in 2010, 36,6 in 2020 and 66 in 2050

This means that, generally speaking, persons of an age when they are economically inactive will outnumber persons of working age.

Early retirements, incentives to employers to make older workers redundant were utilised to face industrial, sectoral and company crises on a case-to-case basis. Also training was often utilised as a “parking area” for older and less older workers waiting for a business-as-usual path constituted by exit subsidies, redundancy payments, unemployment benefits and early retirements. Moreover, specifically at the beginning of the 1980s, early retirements were thought to have a positive impact on opening new opportunities for younger people in substituting the older workers.

In any case, the focus was closely centred on the relationships between employers and employees and between their organisations, while the public sector played a significant role to reduce social conflicts, providing basic services and financing.

During the last decades the focus has been progressively shifted from younger people to older workers, as a results of the demographic change in the relatively most developed countries.

The European Union has been developing policies on anticipating demographic changes as the documents *Towards a Europe for All Ages*” (COM(1999) 221), *Europe's response to World Ageing* (COM(2002) 143) and the recent consultation on the Green Paper *Confronting demographic change: a new solidarity between the generations* (COM(2005) 94) demonstrate.

A long series of experiences, studies and surveys (e.g. the UN Human Development Programme and the European Foundation project on “Combating Age Barriers in Employment”; EF, 1997, 1998, 1999) reveal that older employees are motivated to continue in employment if they fill to be useful and productive and they are supported by both economic and social benefits.

Key questions of the European Union Green Paper *Confronting demographic change: a new solidarity between the generations* (COM(2005) 94)

A new place for “elderly people”

- Should there be a statutory retirement age, or should flexible, gradual retirement be permitted?
- How can elderly people participate in economic and social life, e.g. through a combination of wages and pensions, new forms of employment (part-time, temporary) or other forms of financial incentive?
- How can activities employing elderly people in the voluntary sector and the social economy be developed?
- What should be the response to pensioner mobility between Member States, in particular with regard to social protection and health care?
- How should we be investing in health promotion and prevention so that the people of Europe continue to benefit from longer healthy life expectancy?

Solidarity with the very elderly

- The coordination of national social protection policies is due to be extended to long-term care for the elderly in 2006. How can this help to manage demographic change?
- In particular, should a distinction be drawn between retirement pensions and dependency allowances?
- How do we train the human resources needed and provide them with good quality jobs in a sector which is often characterised by low salaries and low qualifications?
- How do we arrive at a balanced distribution of care for the very old between families, social services and institutions? What can be done to help families? What can be done to support local care networks?
- And what can be done to reduce inequality between men and women when they reach retirement age?
- How can new technologies support older people?

If the need for an improved sense of well-being regards all people at all the stages of their life, diverse dynamics differentiate ageing workers from younger people as a matter of a natural generational development: the former having a shorter time-perspective in comparison with the latter in order to rethink new professional careers and to follow new employment paths.

Key questions of the European Union Green Paper *Confronting demographic change: a new solidarity between the generations* (COM(2005) 94)

A global approach to the “working life cycle”

- How can the organisation of work be modernised, to take into account the specific needs of each age group? How can young couples’ integration in working life be facilitated and how can we help them to find a balance between flexibility and security to bring up their children, to train and update their skills to meet the demands of the labour market? How can we enable older people to work more?
- How can work organisation best be adapted to a new distribution between the generations, with fewer young people and more older workers?
- How can the various stakeholders in the Union contribute, in particular by way of social dialogue and civil society?

According to main lessons stemming from a series of good practice case studies, an inter-generational alliance should be determined combining “essential ingredients” (EF, 1998):

- “An emphasis on the prevention of age management problems, such as the de-skilling of older workers or work-related health problems, rather than reactive problem solving.
- A focus on the whole working life and all age groups, not just older workers.
- A holistic approach encompassing all dimensions that contribute to effective age management.
- In the short term, remedial provision for older workers who missed out on specific skill training or whose health has suffered as a result of their employment.”

If these ingredients play a general role, the specific women’ situations call for a substantial change in organisational and societal behaviours.

The activity rate demonstrates how many persons are enrolled as labour forces (that is employed and persons without work but available for work and actively seeking job) as a percentage of same age total population. The activity rate shows age and gender associated inequalities in labour market opportunities. For example, the following data (Eurostat) show the 2004 situation in the European Union (EU 25 countries), Spain and Italy.

The activity rates in population aged 15-64 are as an average:

- 69,7% in EU (62% for women and 77,5% for men)
- 68,7% in Spain (56,8% for women and 80,4% for men)
- 62,7% in Italy (50,6% for women and 74,9% for men)

The activity rates in population aged 55-64 are as an average:

- 43,9% in EU (34% for women and 54,5% for men)
- 44,4% in Spain (27,2% for women and 62,7% for men)
- 31,8% in Italy (20,4% for women and 44% for men)

Therefore:

- several percentage points separate the activity rate of persons aged 15-64 versus those aged 55-64 as whole (nearly 26 points in EU, 24 in Spain and 31 in Italy)
- the activity rate divide between the two age groups is generally wider for women (28 points in EU, nearly 30 in Spain and Italy) than for men (23 points in EU, nearly 18 in Spain and 31 in Italy)
- if the activity rate is higher for men than for women in the group aged 15-64 (nearly 16 percentage points in EU, 24 in Spain and Italy), this difference generally increases further in the group aged 55-64 (nearly 21 points in EU, 36 in Spain and 20 in Italy)

A long series of problems arise from: pay discrimination, segregation, lack of job security and access, family-work interface, sexual harassment, and so on (EF, 2002).

Women situations are more difficult to be faced than those concerning men. As many times underlined (see for instance the 1995 Beijing World Conference), stereotypes, discriminations, a limited access to resources, rights, goods and services characterise the women conditions both at workplace and in the society.

These barriers create unfavourable ways of life that appear to affect more the older than the younger women workers.

In this case the inter-generational alliance should be even stronger, since ageing decreases the energy to face, combat and overcome the above-mentioned barriers, experienced by all women along their whole life.

Gender mainstreaming has become a central issue and process to pursue a holistic approach suitable to change organisational and societal patterns to avoid inequality and discrimination through the incorporation of a gender perspective and management into all policies, programmes and activities with the involvement of a wider range of stakeholders, from governments to citizens, from public to private sectors, from international organisations to local civil society.

Generally associated with men and women biological characteristics (sex), “gender” refers to the socially constructed roles assigned to persons as ways of being and behaving reinforced by concepts, symbols, rules, institutional culture and power relationships in human systems (e.g. families, schools, companies and other organised agencies). Being a process of social construction, gender classification changes from one culture to another “over time and according to changing and varied social and cultural factors.” (Williams S. et al, 1994).

Significant and demanding changes in attitudes and cultures (both at corporate and societal levels) are required both within organisations and the society as a whole, involving employers, workers, ageing women, social partners, governments, citizens and the civil society.

These changes should be aimed at improving the functioning and capability process related to sustainable life (see Chapter 1) through strategies that include the following principles:

- ageing workers, and among them women, play nowadays a key role for the sake of future development and generations
- ageing women workers have a consistent patrimony of knowledge, experience and culture that can be used to improve the quality of life
- knowledge has to be further improved through vocational training and guidance towards new (that is “more sustainable”) styles of production, consumption and life

Key questions of the European Union Green Paper *Confronting demographic change: a new solidarity between the generations* (COM(2005) 94)

WHAT SHOULD THE EUROPEAN UNION’S ROLE BE?

- Should the European Union be promoting exchanges and regular (e.g. annual) analysis of demographic change and its impact on societies and all the policies concerned?
- Should the Union’s financial instruments – particularly the structural funds – take better account of these changes? If so, how?
- How could European coordination of employment and social protection policies better take on board demographic change?
- How can European social dialogue contribute to the better management of demographic change? What role can civil society and civil dialogue with young people play?
- How can demographic change be made an integral part of all the Union’s internal and external policies?

Employment

Age and gender management, along with the associated issues briefly examined in the previous paragraph, are included into the New European Employment Strategy (“full employment and better jobs for all”, CEC, 2003), which priorities are:

- promoting active ageing
- gender equality
- investment in human capital and strategies for lifelong learning
- immigration
- active and preventive measures for the unemployed and the inactive
- making work pay
- fostering entrepreneurship to create more and better jobs
- transforming undeclared work into regular employment
- promoting adaptability in the labour market
- supporting integration and combating discrimination in the labour market for people at a disadvantage
- addressing regional employment disparities

Naturally, also the employment rates, which are calculated by dividing the number of persons aged 15 to 64 in employment by the total of the same age group, shows age and gender associated inequalities in labour market. For example, the following data (Eurostat) show the 2004 situation in the European Union (EU 25 countries), Spain and Italy.

The employment rates in population aged 15-64 are as an average:

- 63,3% in EU (55,7% for women and 70,9% for men)
- 61,1% in Spain (48,3% for women and 73,8% for men)
- 57,6% in Italy (45,2% for women and 70,1% for men)

The employment rates in population aged 55-64 are as an average:

- 41% in EU (31,7% for women and 50,7% for men)
- 41,3% in Spain (24,6% for women and 58,9% for men)
- 30,5% in Italy (19,6% for women and 42,2% for men)

Therefore:

- several percentage points separate the employment rate of persons aged 15-64 versus those aged 55-64 as whole (nearly 22 points in EU, 20 in Spain and 27 in Italy)
- the employment rate divide between the two age groups is generally wider for women (nearly 26 points in Italy, 24 points in EU and in Spain) than for men (nearly 20 points in EU, 15 in Spain and 28 in Italy)
- if the employment rate is higher for men than for women in the group aged 15-64 (nearly 15 percentage points in EU, 26 in Spain and 25 Italy), this difference generally increases further in the group aged 55-64 (nearly 19 points in EU, 34 in Spain and 23 in Italy)

The New European Employment Strategy has enlarged the scope of the four pillars of the “Luxembourg process” (1997): Employability, Entrepreneurship, Adaptability and Equal Opportunities between women and men. The new strategy aims at:

- full employment
- quality and productivity at work
- social cohesion and inclusive labour market
- a closer coordination between economy and employment policies
- a better governance of the employment policies
- effective and efficient delivery services
- a strong involvement of social partners and the mobilisation of all relevant actors

The New European Employment Strategy follows the goals and orientation of the 2000 Lisbon Strategy and its 2005 revision and priorities' refocusing.

The EU the Lisbon Strategy adopted in 2000

The European Union strategic goal is to become “*the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion*”.

The strategy comprises many specific objectives as to the implementation of reforms and regulations. Environmental concerns have subsequently been integrated as one of the three main pillars of the strategy (economy, social cohesion and the environment).

The goals of the Lisbon Strategy may be summarised as follows:

- To integrate macroeconomic and microeconomic policies
- To increase employment and activity rates
- To complete the Internal Market through product, service and capital market reforms
- To stimulate growth and competitiveness through promoting knowledge, innovation, research and development (R&D) and a favourable business climate
- To improve social cohesion
- To maintain, restore and develop the environment in a sustainable way

According to the European Union (EU) Council of March 2005:

- the Lisbon Strategy has to be re-launched in the wider context of the Gothenburg Strategy for Sustainable Development and its basic “requirement that present needs be met without compromising the ability of future generations to meet their own needs”
- “the Union must mobilise all appropriate national and Community resources – including the cohesion policy – in the Strategy's three dimensions (economic, social and environmental) so as better to tap into their synergies in a general context of sustainable development. Alongside the governments, all the other players concerned – parliaments, regional and local bodies, social partners and civil society – should be stakeholders in the Strategy and take an active part in attaining its objectives”

The unemployment rates represent unemployed persons as a percentage of the Labour Force that is employed and persons without work but available for work and actively seeking job. For example, in 2004 the unemployment rates (Sustainable Development Indicators - SDI, Eurostat) were:

- 9% in European Union (25 countries) with women at 10,2% and men at 8,1%
- 11% in Spain, with women at 15% and men at 8,1%
- 8% in Italy, with women at 10,5% and men at 6,4%

The EU Council of June 2005 approved the integrated guidelines for growth and jobs 2005 – 2008 to refocus the Lisbon Strategy.

The employment guidelines (points 17 to 24) are integrated with the macroeconomic (points 1 to 6) and microeconomic (points 7 to 16) policies and are reviewed only every three years.

INTEGRATED GUIDELINES FOR GROWTH AND JOBS 2005-2008

Macroeconomic guidelines

1. Guarantee the economic stability for sustainable growth
2. Safeguard economic and budgetary sustainability, a prerequisite for more jobs
3. Promote an efficient allocation of resources, which is geared to growth and jobs
4. Ensure that the development of salaries contributes to macroeconomic stability and growth
5. Strengthen the consistency of macroeconomic, structural and employment policies
6. Contribute to the dynamism and smooth operation of EMU (European Monetary Union)

Microeconomic guidelines

7. Increase and improve investments in research and development, in particular in the private sector, with a view to establishing a European area of knowledge
8. Facilitate all forms of innovation
9. Facilitate the spread and effective use of Information and Communication Technologies (ICT) and build a fully inclusive information society
10. Strengthen the competitive advantages of its industrial base
11. Encourage the sustainable use of resources and strengthen the synergies between environmental protection and growth
12. Extend and deepen the internal market
13. Ensure open and competitive markets inside and outside Europe, reap the rewards of globalisation
14. Create a more competitive business environment and encourage private initiative by improving regulations
15. Promote a more entrepreneurial culture and create a supportive environment for SMEs (small and medium sized enterprises)
16. Expand, improve and connect European infrastructures and complete priority cross-border projects

Employment guidelines

17. Implement employment policies aiming at achieving full employment, improving quality and productivity at work, and strengthening social and territorial cohesion
18. Promote a lifecycle approach to work
19. Ensure inclusive labour markets, enhance work attractiveness, and make work pay for job-seekers, including disadvantaged people and the inactive
20. Improve matching of labour market needs
21. Promote flexibility combined with employment security and reduce labour market segmentation, having due regard to the role of social partners
22. Ensure employment-friendly labour costs developments and wage-setting mechanisms
23. Expand and improve investment in human capital
24. Adapt education and training systems in response to new skill requirements

Enterprise creation and self-employment schemes have gained a relevant place in the EU strategies, since the beginning of the 1980's. At that time, both the EU Commission and OECD initiated a new strategic path to integrate employment and development policies through local employment initiatives (LEIs) in a number of policy fields to cope with industrial crises and unemployment.

Local employment initiatives (LEIs) were defined, both at European and OECD levels, as those "which have occurred at the local level - often involving co-operation between individuals, action groups, the social partners, and local and regional authorities - with the specific aim of providing additional, permanent employment opportunities through the creation of new small scale enterprises" (CEC, 1983).

By their nature, LEIs (e.g. Kuenstler P., 1985, 1985a and 1986):

- have diversified structures and, often, a spontaneous origin at the grassroots level
- have objectives, products and services that are of both an economic and social nature
- involve private, public and social sectors
- have increased in scope and concepts (e.g. social economy, social entrepreneurship, not-for-profit and third sector) starting from local self-help, which is one of their historical reasons

Employment services were also requested to become proactive participants in local development by combining sectoral initiatives into integrated policies and plans (OECD, 1985).

The phenomenon of LEIs has been analysed as socially complex processes through which local actors conceive and implement innovative courses of action based on a synergetic utilisation of endogenous resources, to foster employment by means of the diffusion of entrepreneurial culture (e.g. Strati A. and Strati F., 1990; OECD, 1990, 1993 and 1993a).

It is worth remembering the specific EU enquiry which dealt with local employment initiatives and identified new sources of employment (CEC, 1995) in the following 17 fields: home help, child care, new information and communication technologies, assisting the integration of young people in difficulty, housing improvements, safety, local public transport, revitalisation of urban public areas, local shops, tourism, audio-visual sector, developing the cultural heritage, developing local culture, waste management, water management, protection and maintenance of natural areas, regulation and monitoring of pollution and appropriate facilities. These activities can be categorised under three basic headings: person-related; living conditions-related; environment-related.

The LEIs' practices, methodologies and tools have been useful for the EU strategies to bring forth the approach that nourishes the Community Initiatives (e.g. EQUAL, LEADER, INTERREG and URBAN), the management of Structural Funds as well as a streamlined co-ordination between economic, social, environmental and employment policies (CEC, 2002b).

Main lessons from the LEIs underline how important are the following ingredients (CEC, 2000):

- local dimension
- integrated approach
- partnership
- bottom-up approach
- supportive environment
- integrated administrative practises
- financing suited to local needs
- intermediate support structures
- appropriate vocational training systems
- mutually supportive economic, structural and social policies

“Local development is not just seen here as a range of different micro-initiatives operated locally, or as a set of policies that seek to exploit endogenous resources. It is also a means of integrating different policies and programmes at a local level, thus releasing synergies and improving co-ordination, and as a means of improving local governance through involving local people and networks in the formulation and delivery of policy. Indeed, many local development initiatives have their origins in a grass-roots movement of local people and organisations, responding to issues of immediate local concern. Furthermore, it is not necessarily the case that local development only involves very small territories. The size of the territory concerned depends on the functional context i.e. where institutions and people can most easily form networks to tackle commonly perceived concerns” (OECD, 1999)

The analysis of different local case studies revealed how attention has shifted (OECD, 1999):

- from quantitative growth to the development quality
- from standardisation to the value of diversity
- from generic attempts to the identification of local problems and targets
- from short to long term focus by developing dynamics and capacities of the local actors to anticipate and manage change

New trends have favoured innovation in the LEIs (OECD, 1999):

- endogenous development as a concept where human capital is continuously improved through bottom-up approaches
- global – local linkages
- sustainable development through the best use of social, economic and environmental resources in the local area
- good governance and empowerment of local communities as a critical element for sustainable development
- integration of different actors, policy instruments and funding streams
- partnership, co-operation and participation
- decentralisation, de-concentration and accountability
- exchange and dissemination of good practices in order to avoid single model which does not correspond to the variety of local diversities and identities

Social Inclusion

The “at-risk-of-poverty rate after social transfer” is the share of persons with an equivalised disposable income below the risk-of-poverty threshold set at 60% of the national median equivalised disposable income after social transfers. For example, in 2004 this rate (Sustainable Development Indicators, SDI, Eurostat) was:

- 16% in European Union (25 countries) with women at 18% and men at 15%
- 20% in Spain, with women at 21% and men at 19%
- 19% in Italy, with women at 20% and men at 18%

The Charter of Fundamental Rights of the European Union (proclaimed in Nice in December 2000), the EU 2003 Social Agenda (launched in 2003), the Community Action Plan to combat social exclusion (2002 – 2006) as well as the new Social Agenda (2005 – 2010) underline the need to integrate approaches, methods and tools, suitable to cope with the multiple implications of the poverty and social exclusion within and between the present and future generations.

This challenge was clearly defined along with an intensive activity aimed, inter alia, at improving the understanding of social exclusion and poverty in order to define and implement innovative strategies and courses of action at local, national and European levels where a relevant connection exists between employment and social inclusion policies.

Following several European Councils (e.g. Lisbon, Feira, Laeken and Barcelona), four main objectives were defined as the basis for elaborating NAP (National Action Plans) capable of implementing a shared strategy combining bottom-up and top-down approaches:

1. to facilitate participation in employment and access by all to the resources, rights, goods and services
2. to prevent the risks of exclusion
3. to help the most vulnerable
4. to mobilise all relevant bodies

Each of the above-mentioned objectives has a range of specific measures.

1.1 Facilitating participation in employment

- To promote access to stable and quality employment for women and men capable of working
- To prevent exclusion of people from work by improving employability (human resources management, work organisation, lifelong learning)

1.2 Facilitating access to resources, rights, goods and services for all

- Social protection systems
- Decent and sanitary housing, basic services (electricity, water, heating, etc.)
- Healthcare, including dependency situations
- Education, justice, public and private services (culture, sport, leisure)

2. *To prevent the risks of exclusion*

- To exploit the potentials of the knowledge-based society and related technologies and ensure that no one is excluded - special attention to people with disabilities
- To prevent life crises which can lead to situations of social exclusion (e.g. indebtedness, school exclusion, homeless)
- To preserve family solidarity

3. *To help the most vulnerable*

- To promote social integration of women and men at risk of persistent poverty (e.g. disability, groups experiencing particular integration problems)
- To move towards the elimination of social exclusion among children
- To develop comprehensive actions in favour of areas marked by exclusion

4. *To mobilise all relevant actors*

- Participation and self-expression of people suffering exclusion (situations, policies and measures affecting them)
- Mainstreaming the fight against exclusion into overall policy by: mobilising public authorities (national, regional, local); developing coordination procedures and structures; adapting services to the needs of people suffering of exclusion
- Dialogue and partnership between public and private bodies by: involving social partners, NGOs and social service providers; encouraging the social responsibility and active engagement of all citizens; fostering corporate social responsibility (CSR)

This final point is further elaborated in the EU strategy for Corporate Social Responsibility (CSR, see Chapter 1) stating that:

- employment and social policy integrates the principles of CSR, in particular, through the European Employment Strategy, the European Social Inclusion Strategy, initiatives to promote equality and diversity in the workplace, the EU Disability Strategy and the Health and Safety Strategy and so on
- looking at these policies, CSR is really manifested when there is a development in the quality of employment and specific measures are taken to promote lifelong learning, social dialogue, information, consultation and participation of workers, equal opportunities, integration of people with disabilities, anticipation of industrial change and restructuring.

The fourth objective as a whole was demonstrated to play a transversal role in relation to the others, as it relates to the issues of a better Governance (see Chapter 3).

Moreover the mobilisation of all actors is another key factor that connects the EU employment and social inclusion strategies by applying the Open Method of Co-ordination (OMC).

However the OMC has been more effective and efficient in employment than in social inclusion policy.

The OMC is in fact differently structured between the two policies and give different results in terms of institutional capability and functioning.

In the European Employment Strategy, annual recommendations are an useful and compelling complement to the implementation of guidelines shared by the Member States. This procedure makes it possible to comply with requirements related to common objectives and to add a value to policies that connect both the European (inter-State) and national (inter-regional) dimensions.

The value adding process is nourished by the annual assessment between the actual and expected results. In order to evaluate the process, to have a voice at European level and to influence the policy decisions, national action plans (NAPs) should be formulated with clear targets and coherent measures. To define reliably expected results and measures, consultations with the relevant stakeholders and, possibly, co-decision mechanisms are beneficial; moreover they allow the Member States to better defend their strategies at the EU round tables.

The Open Method of Co-ordination (OMC) is based on five key principles:

- Subsidiarity, to establish an equilibrium between European Union level co-ordination in the definition of common objectives and outcomes, and Member States' responsibilities in deciding the detailed content of action
- Convergence, to achieve commonly agreed employment outcomes through concerted action, where each Member State contributes towards raising the European average performance
- Mutual learning, to exchange good practice and experience between the EU Member State
- Integrated approach, to commit Governments as a whole, as well as a wide range of stakeholders, to the integration between active labour market policies and social, educational, tax, enterprise and regional policies; structural reforms require consistent and concerted action over a wide range of policies and measures
- Management by objectives, to define targets, expected results, quantitative or qualitative indicators for benchmarking, monitoring and evaluating progress on the basis of shared values among the Member States and issues which are felt to be of common concern

The general OMC framework applied to the employment strategy reveals the effective commitment of each Member State and it is more mandatory than the OMC framework concerning the social inclusion process.

In this case, in fact, national action plans (NAPs) are elaborated on a biennial basis and followed by assessment formulated through joints reports where key points are identified for each Member State in terms of weaknesses and challenges.

For the social inclusion policy in the period 2003-2005, the European Commission outlined the following six key priorities (CEC, 2003b):

1. active labour market measures for the most vulnerable
2. combating the poverty trap
3. accessibility of services
4. preventing early school leaving & transition to work
5. ending child poverty
6. immigrants and ethnic minorities

Without statutory requirements (e.g. recommendations), without more compulsory and systematic valuation (e.g. yearly based), national governments can feel free to dedicate less attention on the EU obligations and less time to elaborate documents in accurate and politically-useful way through specific bodies, structures and procedures aimed at involving a wide range of stakeholders. As a result, the need for integrated policies and measures is differently perceived: more emphasis is put on the employment strategy and less on the social inclusion policy, strengthening a conventional way of thinking that affirms the latter being solved by the former to a large extent.

Flexicurity towards a sustainable life

The European Strategy for Sustainable Development (CEC, 2001) declares that fundamental labour rights, gender equality, public health, the fight against poverty and social exclusion, the economic and social implications of an ageing society are main issues to be dealt with through a comprehensive, cross-sectoral strategy for sustainable development.

<p>A Sustainable Europe for a Better World: A European Strategy for Sustainable Development (CEC, 2001, Gothenburg)</p>	
<p>Three out of six priorities regard age and gender management, social, employment and health issues within a strategy of long-term perspectives, outcomes and measures:</p>	
<ul style="list-style-type: none"> ▪ Combat poverty and social exclusion ▪ Deal with the economic and social implications of an ageing society ▪ Address threats to public health 	<ul style="list-style-type: none"> ▪ Limit climate changes and increase the use of clean energy ▪ Manage natural resources more responsibly ▪ Improve the transport system and land-use management

A series of important documents, elaborated at European level, strengthen, innovate and readdress basic strategies towards a more coherent perspective, namely: the Social Agenda (CEC, 2005b), the review of the Lisbon Strategy (CEC, 2005c) and of the EU Sustainable Development Strategy (CEC, 2005d). They contributed to the key driving conclusions taken by the EU Council of March 2005:

- all policies must integrate the three dimensions (economic, social and environmental) of sustainable development
- all appropriate national and Community resources must be mobilised through the active participation of the relevant stakeholders at different levels (governments, parliaments, regional and local bodies, social partners and civil society)

<p>The European Union Social Agenda 2005 – 2010 (CEC, 2005b)</p>
<p>The motto is: "A social Europe in the global economy: jobs and opportunities for all".</p>
<p>The vision, confirmed by the mid-term review of the Lisbon strategy, consists of ensuring "the sustainable development of Europe (...) aiming at full employment and social progress and a high level of protection and improvement of the quality of the environment".</p>
<p>Social cohesion, modernisation and development of the European social model are integral parts of both of the Lisbon Strategy and of the Sustainable Development Strategy.</p>
<p>A common European framework with diversified measures to respond to specific needs supports the motto "United in diversity", proclaimed by the draft Constitutional Treaty.</p>
<p>Prosperity, Solidarity and Security are at the basis of the following objectives:</p>
<ul style="list-style-type: none"> ▪ Achieving full employment ▪ A new dynamic for industrial relations ▪ Towards a European labour market ▪ A more cohesive society: equal opportunities for all ▪ Combating poverty and promoting social inclusion ▪ Promoting diversity and non-discrimination ▪ Social services of general interest

Strategic changes are needed and they regard the reconciliation of times dedicated to work, family and social activities by means of new forms of flexibility in labour market and security in welfare state.

Four types of flexibility can be distinguished (EF, 2003a):

- “contractual flexibility, which refers to practices designed to modulate employment statutes within undertakings and organisations
- productive / geographical flexibility, which refers to practices for decentralising production and the use of subcontractors
- temporal flexibility, which makes use of variations in working hours and atypical hours or hours determined at short notice; and
- organisational flexibility, which refers to practices designed to increase the multitasking of workers and depart from conventional patterns of subordination”

As a general meaning, flexibility (from the Latin word “flectere”, to bend) is the ability to easily and readily adapt to changes in conditions and circumstances. It is a “reactive” capacity of individuals, organisations and systems, very near to the concept of resilience (see Chapter 2).

For example, a labour market is flexible when the variety of its relationships between different components (employers, employees, unemployed persons, employment services, development and labour agencies, etc.) allow the whole system to react and adapt to natural (e.g. frictional and short term fluctuations) or induced stress situations (e.g. economic crises) by resisting or changing in order to reach and maintain an acceptable level of functioning and structure.

Each component (as an individual system) can move from low (to bend but do not break) to high degrees of reaction (to bend but to straighten).

A “proactive” attitude appears when the components themselves manage, anticipate and also determine the change.

The connection between re-active and pro-active attitudes of each component nourishes the self-organising and co-evolving capacity of the labour-market system as a whole through a recursive process of “win-win” relationships.

On the contrary, marginalisation, precariousness and instability appear when the components’ diversity is not respected and unbalanced relationships allow some components to prevail over the others. This tendency increases the disorder (the entropy) while reducing the flexibility (the resilience) of the labour-market system.

In conclusion, co-evolving and self-organising properties determine a dynamic equilibrium of the labour market, which gives stability to the system while conforming with the continuous changes that affect its components and interrelationships.

The system stability is based on a supportive network of relationships (e.g. rules, procedures and measures) that allow each component to determine its own web of ways of life (e.g. behaviours, feelings, social interactions).

The individual components feel themselves being safe and not having fears or worries: they perceive the system stability in terms of security (from the Latin words “sed”, without, and “cura”, worry).

For instance, flexibility in the labour-market system will be positively perceived by its components if security is incorporated in its internal regulations and through converging measures that concern associated issues in other policy fields (social, health, housing, education and so on).

As a general consideration, security systems regard the different typologies of welfare state, historically distinguished between “occupational-based approach” (aimed at maintaining the workers’ income) and the “universalism-based approach” (aimed at ensuring an adequate and uniformly distributed income to all, as well as a fair accessibility to basic service).

Historically the male breadwinner model played an important role in all the typologies of social protection systems, with evident disparities from a gender point of view: women result to be less protected than men.

There is a need for integrating policies, approaches, instruments and measures to allow flexibility to increase insofar as security increases and vice versa.

This is the challenge of the “flexicurity” concept as the fusion of flexibility and security policies.

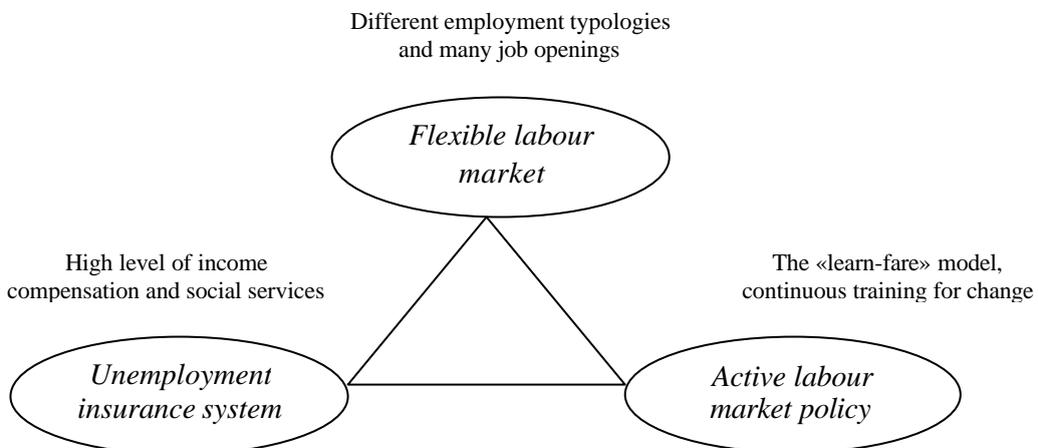
The flexicurity concept (Wilthagen T., 1998) has emerged as an interesting path to modernise the European social model, mobilising many actors (businesses, workers, NGOs and public authorities).

Even though flexicurity is very simple to be understood, a multitude of complex systems and practices related to flexibility and security makes it very hard to find out an easy combination and workable solutions. There is need to analyse specific situations and to find out tailored options. The temporal dimension, moreover, plays a relevant role, for instance ageing workers have different situations and needs compared to younger workers; the same regards women compared to men within different age classes.

The “golden triangle” of flexicurity: the Danish experience

The Danish labour market, being an integral part of the socio-economic and the welfare state systems, has been described (Madsen P., 2001) as a “golden triangle” consisting of:

- A flexible labour market characterized by comparatively weak employment protection legislation (partly supplemented by collective agreements for certain sectors, especially with regard to dismissal notice periods)
- Generous income protection in case of unemployment
- An encompassing active labour market policy, including extensive training programmes enabling the unemployed to return to work as soon as possible



The Sustainable Life Development (SLD) approach broadens the scope of the flexicurity concept to nurture the functioning and capability process (see Chapter 1) by means of good governance and the empowerment of local authorities and communities, citizens and the civil society as a whole (see Chapter 3).

Summary

The issue of equal opportunities plays a relevant role in the courses of action aimed at increasing the capacity of local stakeholders to deal with the challenge and the problems concerning demographic change.

Flexicurity towards a sustainable life emerges as a driving orientation to integrate the policy fields examined in this Chapter (e.g. age and gender management, employment and social inclusion) within a better Governance (Chapter 3) for Sustainable Development and Corporate Social Responsibility strategies (Chapter 1).

The definitions of the specific concepts presented in this Chapter are summarised here below.

Key definitions

Age management is the management of the interrelationships among human beings to comply with demographic changes according to equity principles in such a way that the present generations can satisfy their needs and improve their quality of life without compromising the ability of future generations to meet their own needs.

Gender management is the management of the interrelationships among human beings to orient the socially constructed roles assigned to each of them (generally associated with men and women biological characteristics) towards equity principles that allow the less favoured persons and groups to improve their quality of life by means of driving factors of change (e.g. concepts, symbols, rules, institutional cultures and power relationships) in the concerned systems (e.g. families, schools, companies and other organised agencies).

Flexibility (very near to the concept of resilience) is the ability of individuals, organisations and systems to easily react and readily adapt to change, reaching and maintaining an acceptable level of functioning and capabilities through the variety of relationships between different components.

Security is the feeling of being safe and not having fears or worries within the dynamic equilibrium of a system that gives stability to supportive network of relationships (e.g. rules, procedures and measures) while allowing each component to determine its own web of ways of life (e.g. behaviours, feelings, social interactions).

Flexicurity is the fusion of flexibility and security, a process where the integration of different policies, approaches, instruments and measures allows flexibility to increase insofar as security increases and vice versa.

Key questions

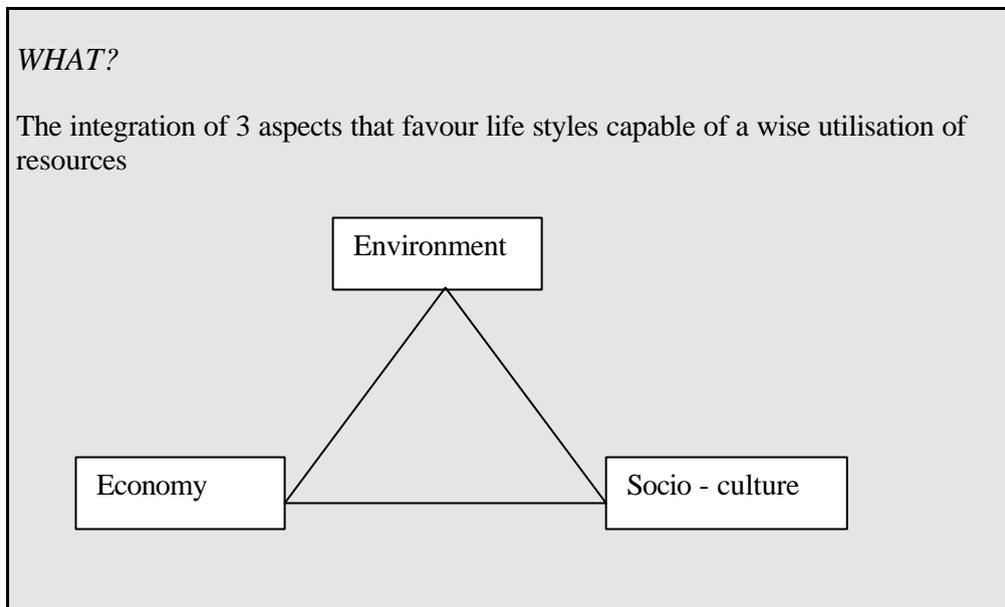
The conjunction of entrepreneurial strategies with territorially-based social and employment policies is not a new perspective as it is clearly a part of the history of labour movements around the world. A key question concerns however the present time:

How social and employment strategies can move towards sustainable development?

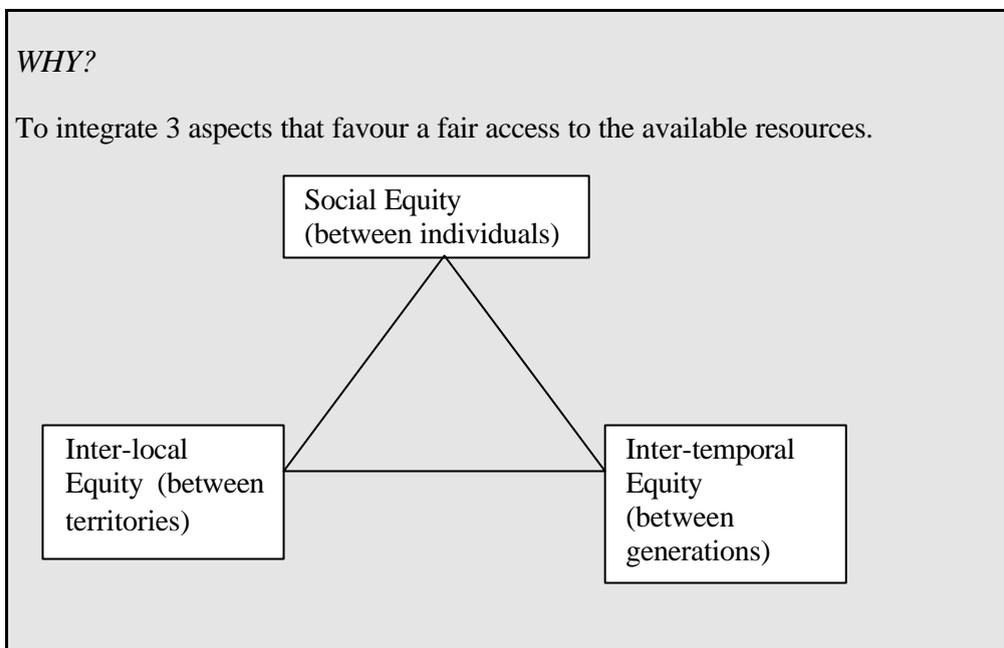
The Rio Declaration and the associated Agenda 21 (1992) are a clear example in this direction since they are aimed at improving the human capacity to connect:

- employment, social inclusion and other associated policies in a coherent planning system that favours continuous changes in production and consumption styles
- present and future times allowing people to have a fair access (equity) to the available resources (human-made, human and natural) while maintaining and renewing them
- local, regional, national and global dimensions (glocacity) allocating responsibility, autonomy and resources to the most appropriate level for favouring participatory decision making processes

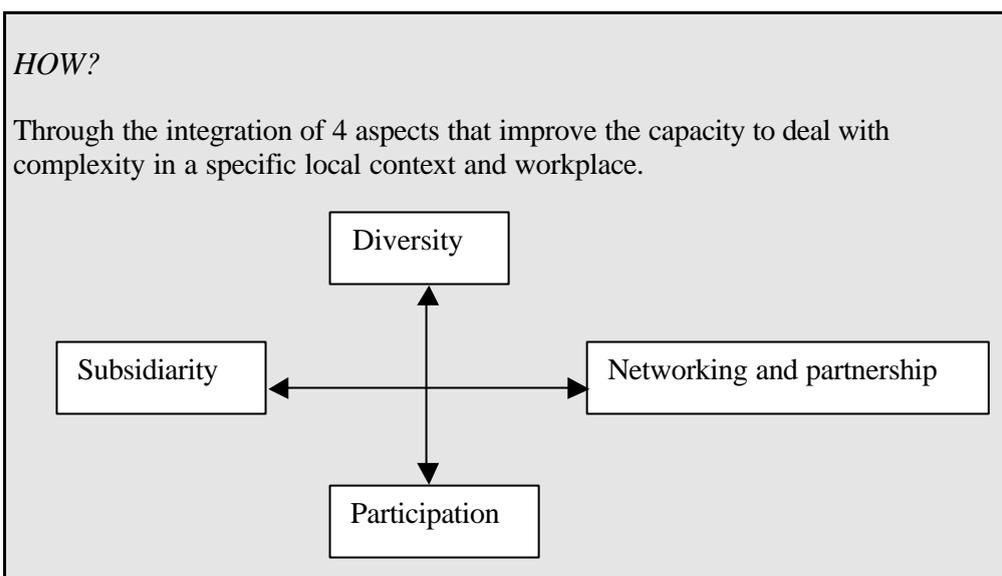
The strategic priorities and measures given by the Rio World Summit to the Agenda 21 can be summarised as follows in the “What”, “Why” (see Chapter 1) and “How” (see Chapter 2) aspects of Orientation towards the Sustainable Life Development (SLD) approach.



<i>SLD aspects</i>	<i>Summary of the Agenda 21 guidelines</i>
Environment	<ul style="list-style-type: none"> ▪ wise, synergetic utilisation of the endogenous and global natural resources, diversifying employment and activities to protect the ecosystems, developing environmentally sound products, processes, consumption and culturally sensitive activities
Economy	<ul style="list-style-type: none"> ▪ employment creation for women, people at risk of social exclusion, the poor and so on through the provision, improvement and maintenance of urban infrastructure and services and the support of economic activities also in the informal sector ▪ integration of the value of unpaid work, including work that is currently designated "domestic", in resource accounting mechanisms in order better to represent the true value of the contribution of women to the economy ▪ development of a new entrepreneurial culture, more aware and responsible of the environmental, social and employment issues
Socio-culture	<ul style="list-style-type: none"> ▪ promotion of women's literacy, education and training ▪ education and vocational training policies to foster awareness and commitment for the environmental and social issues, with a specific attention on people at risk of social exclusion and the children improving technical skills and managerial capacity of small business entrepreneurs ▪ the incorporation of the concepts of environmental awareness and sustainable development throughout the curricula



<i>SLD aspects</i>	<i>Summary of the Agenda 21 guidelines</i>
Social equity	<ul style="list-style-type: none"> ▪ equal employment opportunities between men and women and equitable remuneration for women in the formal and informal sectors with adequate economic, political and social support systems and services, including child care, particularly day-care facilities and parental leave, and equal access to economic, socio-cultural and natural resources ▪ comprehensive, preventive and curative health facilities, which include women-centred, women-managed, safe and effective reproductive health care and affordable, accessible, responsible planning of family size and services, as appropriate, in keeping with freedom, dignity and personally held values ▪ the increase in the proportion of women decision makers, planners, technical advisers, managers and workers ▪ the respect and enforcement of the workers rights and human rights, fighting the abuses especially against women and people at risk of social exclusion, providing all persons with legal protection ▪ specific assistance to the poorest through, inter alia, the creation of social infrastructure in order to reduce hunger and homelessness, and the provision of adequate community services
Inter-local equity	<ul style="list-style-type: none"> ▪ reduction of discrepancies among local contexts and regions ▪ decentralisation of urban development to relieve pressure on large urban agglomerations, to develop intermediate cities and so on
Inter-generational equity	<ul style="list-style-type: none"> ▪ procedures to incorporate future generations and children's concerns into all relevant policies and strategies at the local, regional and national levels, including those concerning allocation of and entitlement to natural resources, housing and recreation needs, and control of pollution and toxicity



<i>SLD aspects</i>	<i>Summary of the Agenda 21 guidelines</i>
Diversity	<ul style="list-style-type: none"> ▪ opportunities and the support necessary for all persons to fulfil their personal, economic and social aspirations and potentials ▪ creation and diversification of employment opportunities through endogenous economic activities that do not expand resource degradation and consumption, promoting the development of small-scale economic activities, to foster biodiversity, organic farming, environmentally protected areas and so on
Subsidiarity	<ul style="list-style-type: none"> ▪ empowerment of local communities, community groups, non-governmental organizations and individuals delegating authority, responsibility, accountability and resources to the most appropriate level
Networking and partnership	<ul style="list-style-type: none"> ▪ support to community-based organizations, private voluntary organizations and other forms of non-governmental entities that can contribute to the efforts to reduce poverty and improve the quality of life for low-income families
Participation	<ul style="list-style-type: none"> ▪ association freedom, active participation in local development and corporate strategies and plans, incorporating environmental, health and security issues ▪ workers' participation in environmental audits at the workplace and in environmental impact assessments ▪ mobilisation of communities with a specific focus on sensitization to environmental issues

Other good practices can be examined to find out ingredients that strengthen the elaboration of innovative strategies in territorial and entrepreneurial systems. To this end the SLD approach utilises a method that is presented in next Chapter.

CHAPTER 5: CONNECTING THEORY AND PRACTICE

Introduction

The Sustainable Life Development (SLD) approach aims at exchanging knowledge from current practices and at identifying ingredients that can be utilised to stimulate and strengthen creativity and innovation while valuing diversity.

A SLD project is favoured by the capitalisation on lessons stemming from the current good practices.

Several methods are utilised to analyse and transfer good practices. It is however important to define some leading concepts that embrace the meaning of (good) practice in the wider domain of knowledge (Chapter 2).

The following paragraphs present basic definition of:

- living practices
- approach, methods and tools (AMT)
- dynamics concerning transfer, adaptation and integration (TAI)

Living practices

A practice is:

- a course of actions based on the utilisation of approaches, methods and tools that has become familiar to knowledge, behaviour and capacities of the concerned persons and social communities
- produced by a continuously open learning process among persons and social community
- the result of a combination between different temporal and spatial dimensions that form the framework of knowledge, experience, feeling, thinking and acting
- the result and symbolic expression of social interaction as a nested process between several actors (persons and groups) that reciprocally orient their ways of thinking and acting while mutually influencing their own motivations and behaviours
- an individual framework of reference as far as it is socially determined and shared by persons, groups and/or the society as a whole

A practice is not good by itself as a whole, for ever and for any context, but it depends on specific local contexts, purposes and situations.

A local context is a whole (system) of relationships between persons, organisations, behaviours, cultures and rules.

A purpose is the reason for which a course of actions (policy, initiative, strategy, project etc.) is elaborated and performed or an instrument (tool, institutional mechanisms, measure, rule etc.) is created.

A situation is what is happening in a particular place at a particular time, a set of circumstances linked to the combination of time and space dimensions.

A practise is good as far as it stimulates innovation and change in the context where the practice has been determined as well as in other contexts and other purposes and situations through:

- a process of trial and error that improve knowledge, skills and competence (capacity building)
- a process of codified (formal) and tacit (informal) learning and knowledge based on a permanent comparison and exchange between our own and other ways of acting and thinking

A (good) practice can be learnt if it combines at least three effects:

- demonstration, that is the perception of concreteness by which a practice that works well in a specific context (or for a specific purpose or situation) can be implemented in other context (or for other purpose or situation)
- involvement, that is the perception of possible dissemination by which a practice performed by other actors (persons and groups) can be implemented also in our own context (or for our purposes or situations)
- novelty, that is the perception of dissonance by which a practice emerging from a specific context (or a specific purpose, or situation) can open new options and perspectives with respect to practices currently performed in our own context (or for our purposes or situations)

For the above-mentioned reasons, a practice should be analysed to learn lessons that can be utilised to nourish new practices.

AMT: lessons – ingredients of a practice

Useful lessons are not generic but specifically anchored to the existing problems and solutions envisaged and / or found by means of the ingredients that form the practice.

Practices are here intended as projects, plans and other local initiatives.

These practices must be carefully fragmented into its relevant ingredients.

Ingredients are approaches, methods and tools that constitute the living structure of a practice.

Approach (A) is the *theoretical framework* of a good practice.

It makes clear ways of thinking about specific issues. It contains *concepts* that allow partners to share a common language and to formulate strategies in a given context.

Examples are: documents, studies, reports (e.g. theoretical handbooks) that explain the orientation towards change and innovation processes; case studies that explain relevant concepts, approaches or strategies; training content that explain their theory-based orientation.

Simplified statements can be elaborated to make it easier understandable an approach in terms of vision and missions.

Methods (M) form the *operational framework* of a good practice. They describe how the theoretical framework can be put in operation in the concerned context.

Examples are: operational handbooks that explain how analyses, needs assessment, case studies, etc. are carried out in practice (step-by-step); training manuals etc.

Tools (T) are the practical means (e.g. products) of a good practice that put the methods into operation. In other words, they allow methods (i.e. the operational framework) to be implemented in a specific context while following the theoretical framework (approach).

Examples are: training tools and techniques; adaptability index & other measurements; assessment and decision support systems; e-learning platform, website, other software and equipments.

TAI: driving factors for exchange

Unfortunately usability of lessons – ingredients is influenced also by some conditional attitudes and behaviours that act generally as facilitating or impeding factors both on individual and communities, both in alternate and erratic ways:

- falling in love that consists in considering beautiful, interesting and exciting everything coming from other experiences or, on the contrary, what is currently experienced by one's own community
- standing back that consists in disregarding other experiences or considering them already tested or present in one's own community
- resisting that consists in considering not applicable to one's own community experiences stemming from outside but only those endogenously (internally) determined
- blocking that consists in believing experiences cannot be imported or exported because of too different cultures and situations existing in one's own and other communities

For the above-mentioned reasons, usability of an ingredient should be assessed carefully highlighting what is its most relevant property among the following ones.

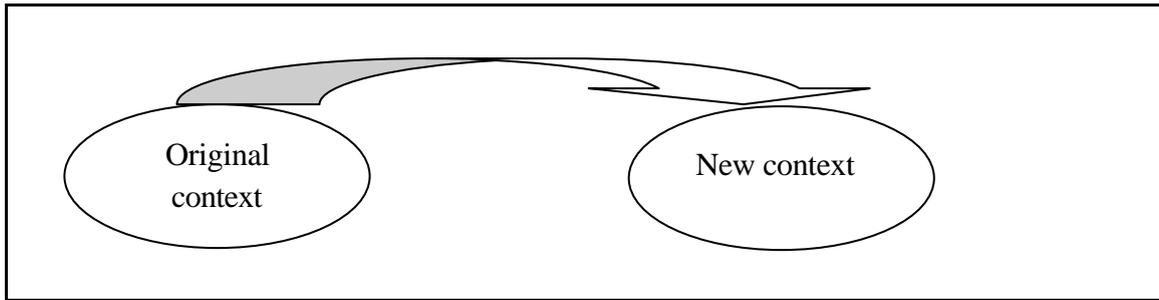
Transferability (T) is the ability (or property) to be passed to and be used by another local context without any change.

An ingredient elaborated and tested in a specific local context can be easily passed to another specific context.

Transferability is very near to the ecological property of Reutilisation: the utility of materials and products continues to exist for a long period of time without changing their ways of utilisation.

Transferability can be found in:

- Approaches, when for example a concept definition, a series of strategic guidelines can be used in another context as they were originally formulated
- Methods, when for example a manual is easy usable in another course of actions as it was originally formulated
- Tools, when for example an index / indicator or a training technique can be easy translated in other similar instruments



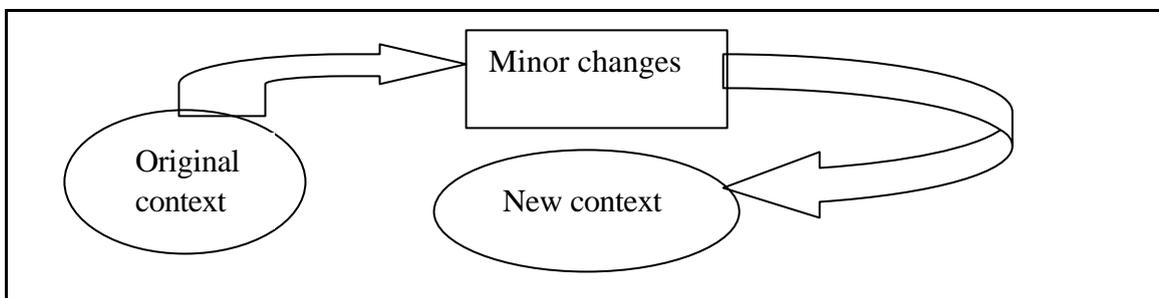
Adaptability (A) is the ability (or property) to become suitable for a new purpose or situation through small changes.

Although an ingredient has been tested for a specific purpose or situation, it can be worked out in a suitable manner to be used for another purpose or situation.

Adaptability is very near to the ecological property of Recycling: existing products become “raw” materials for new products generally changing their main purposes and ways of utilisation.

Adaptability can be found in:

- Approaches, when for example some change in concept definitions, in components of a strategic document can allow another purpose or another situation to be better and carefully understood in order to deal with it
- Methods, when for example some change in a training manual can allow it to be used as a facilitator’s field book
- Tools, when for example an index / indicator or a training technique can be easy translated in other different instruments



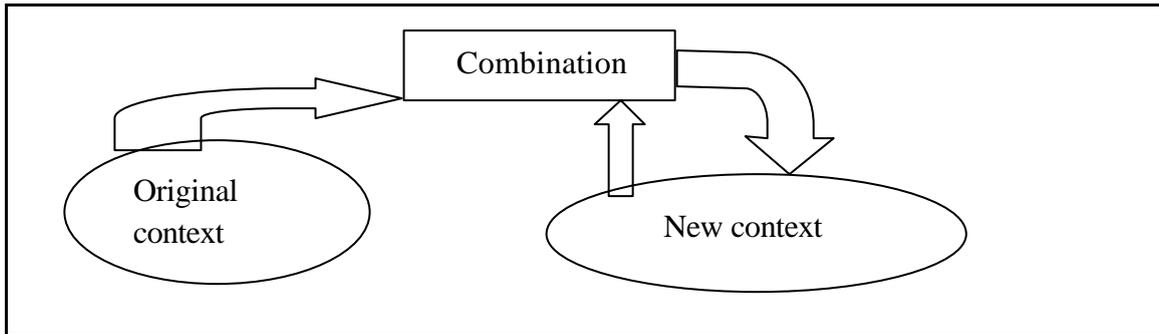
Integrability (I) is the ability (or property) to be combined with other components.

An ingredient tested in a specific context or for specific purposes can form part of other ingredients existing in other contexts and for other purposes.

Integration-ability is very near to the ecological property Reduction of consumption: resources are saved in “doing more with less”.

Integrability can be found in:

- Approaches, when for example some definitions and strategic components can be linked to and mixed with other definitions and components saving resources (time included) to produce new concepts and documents
- Methods, when for example methods in training manuals can be combined with other methods to form new handbooks
- Tools, when for example an index / indicator or a training technique can be mixed with other instruments to support evaluation and decisions in other policy fields



Summary

Having examined the issue of knowledge transfer concerning good practice, Chapter 5 connects theoretical and operational aspects of the Sustainable Life Development (SLD) approach.

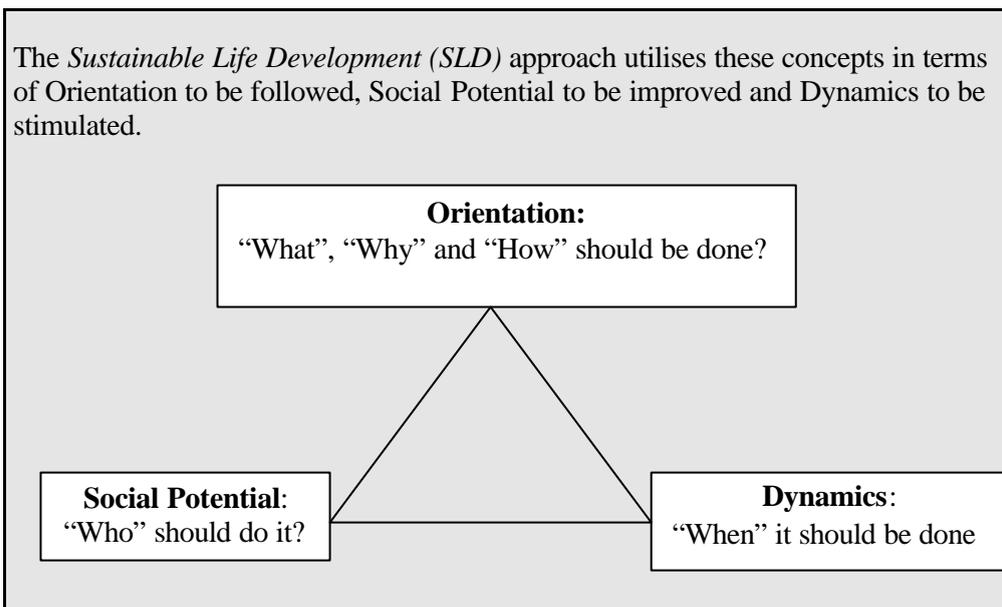
The definitions of the concepts presented in this Chapter were utilised by the AWARDS project focusing the attention on the 10 Orientation aspects of the SLD approach. More details are available in two electronic publications:

- *The AWARDS Sources for Change. From inventory to analysis to innovation*
- *The AWARDS Peer Review of 29 good practices*

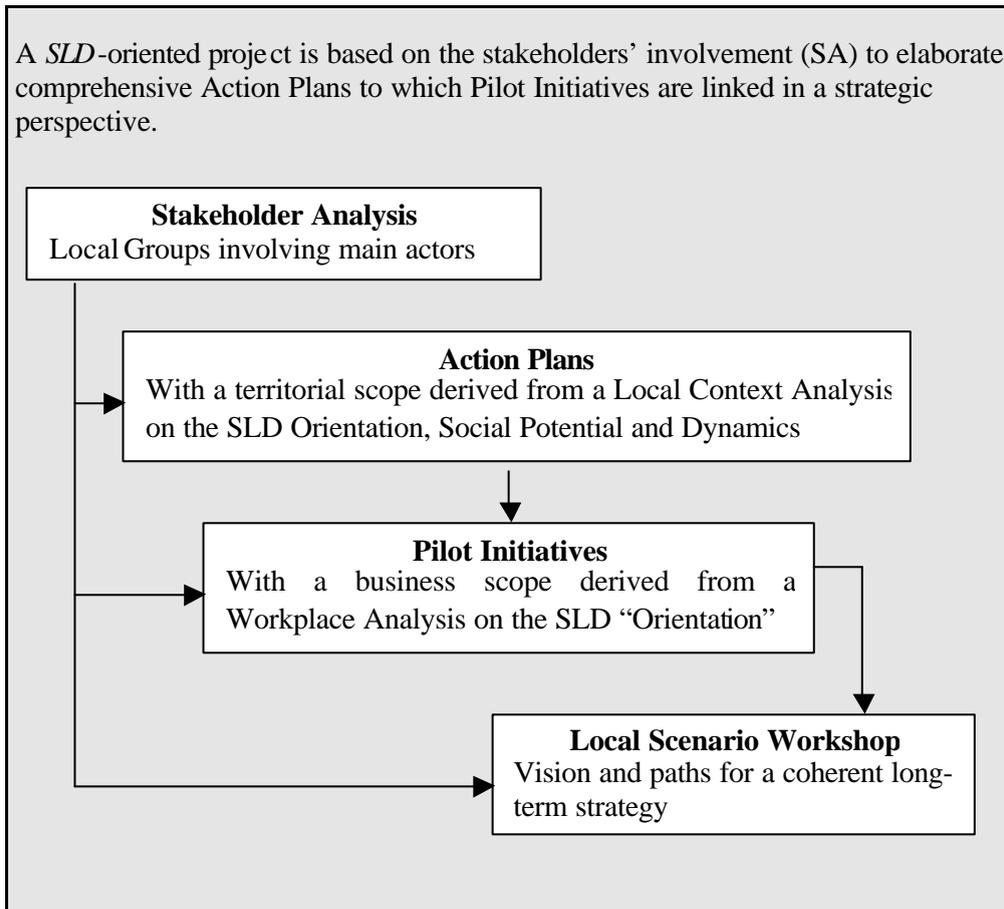
Key questions

Having clarified the “What and Why” (Chapter 1), the “How and When” (Chapter 2) and the “Who” (Chapter 3) of the SLD approach, two final questions need to be still answered:

Is the Sustainable Life Development (SLD) approach able to utilise the concepts quoted so far in a simple but holistic system of evaluation and decision making?



Will the Sustainable Life Development (SLD) approach provide a coherent structure to elaborate and implement correlated territorial and business strategies?



As far as concepts are concerned (first question), the following tables show how they are integrated and connected by the Sustainable Life Development (SLD) approach.

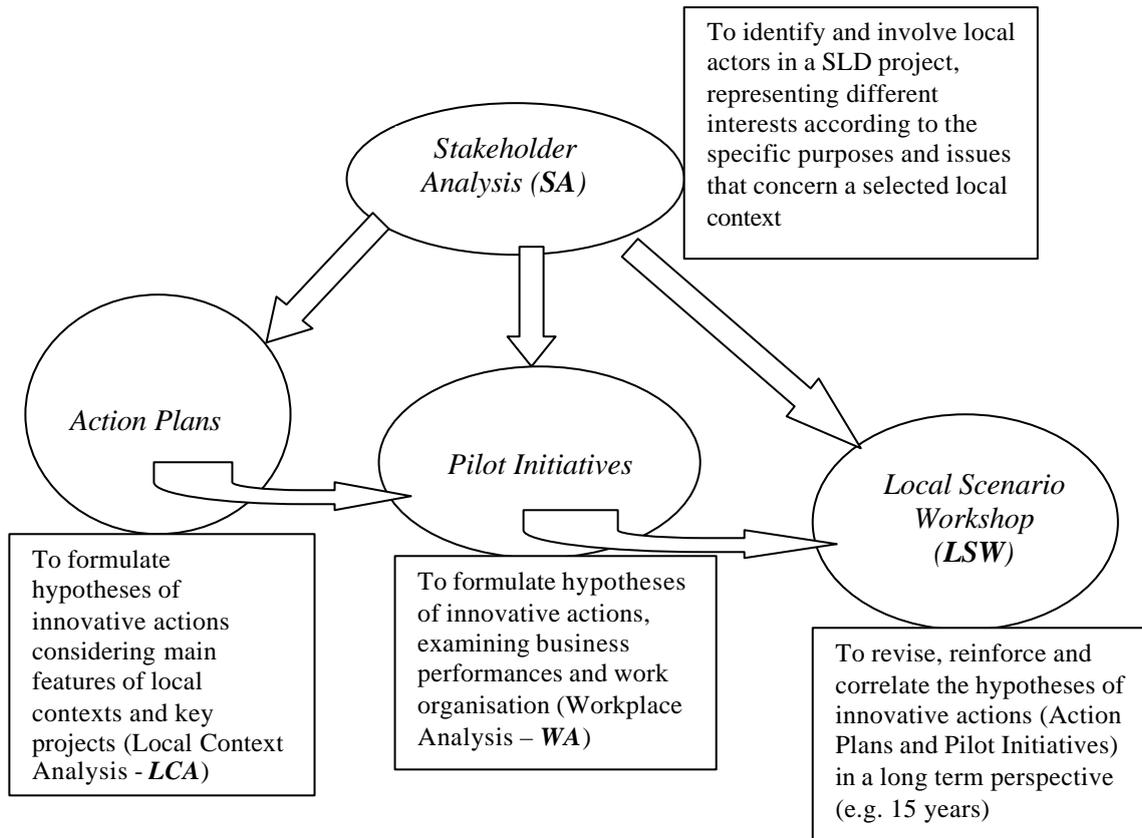
ORIENTATION: Which direction should be given to territorial and corporate systems?	
What do we want to sustain?	The integration between three Development Dimensions : <ul style="list-style-type: none"> ▪ The environment ▪ Economy ▪ Socio-culture
Why do we want to sustain it?	To integrate three Equity Dimensions <ul style="list-style-type: none"> ▪ Equity between individuals ▪ Equity between territories ▪ Equity between generations
How do we want to sustain it?	Through the integration of four Systemic Principles : <ul style="list-style-type: none"> ▪ Diversity ▪ Subsidiarity ▪ Networking / Partnership ▪ Participation

Chapter 4 provides an example on how the 10 Orientation aspects of the SLD approach can be applied examining the Agenda 21 guidelines approved by the 1992 World Summit of Rio de Janeiro.

SOCIAL POTENTIAL: Which societal capacity should be built to follow the SLD Orientation?	
Institutional Capital	<ul style="list-style-type: none"> ▪ Competence distribution for strategic decision making ▪ Budget autonomy to support strategic decision making ▪ Fair interactions ▪ Access to information, dialogue and debate
Human Capital	<ul style="list-style-type: none"> ▪ Perception of a variety of development approaches ▪ Entrepreneurial creativity and innovation ▪ Capacity to cope with complexity and to anticipate change ▪ Employability ▪ Reliance on one's own resources without compromising those of others ▪ Integration of social and technical skills for innovation process
Social Capital	<ul style="list-style-type: none"> ▪ Local knowledge for diversification processes ▪ Multicultural cohesion to enhance local development ▪ Social cohesion ▪ Mobilisation of all actors ▪ Shared value system ▪ Shared visions of development

DYNAMICS: Which driving energies should be stimulated to allow Social Potential to produce changes in favour of SLD?
<ul style="list-style-type: none"> ▪ Problem understanding ▪ Open collective learning ▪ Negotiation and co-decision ▪ Creation of a shared vision ▪ Client orientation ▪ Result orientation

As far as the project structure is concerned (second question), the following figure gives the direction of the main steps (phases and procedures) to be followed in order to determine a coherent implementation of the Sustainable Life Development (SLD) approach.



The following Chapters present all the necessary details on how to carry out a Stakeholder Analysis (Chapter 6), how to elaborate Action Plans (Chapter 7) and Pilot Initiatives (Chapter 8), and how to perform a Local Scenario Workshop (Chapter 9).

CHAPTER 6: STAKEHOLDER ANALYSIS

Introduction

The Sustainable Life Development (SLD) approach aims at integrating different interests and relationships within and between policy fields as well as territorial and entrepreneurial systems.

The starting point of a SLD project is the analysis of the local stakeholders to discover how they will and can contribute to the issues of age and gender management in view of a close connection between the strategies and policies on sustainable development, employment, social inclusion, corporate social responsibility and governance.

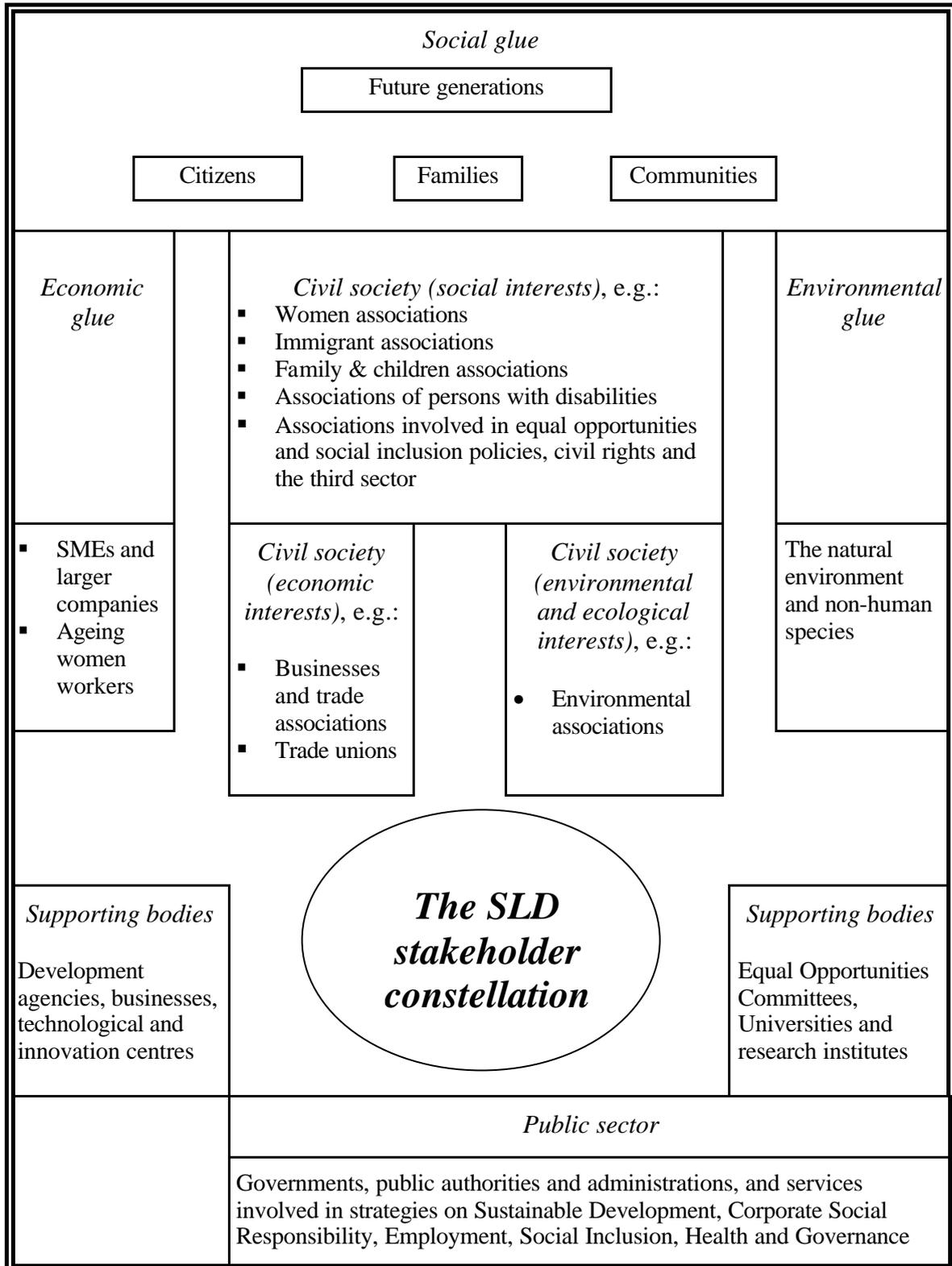
The analysis allows the stakeholders to be involved in groups that support the operational phases of a SLD (Sustainable Life Development) project to elaborate the territorial Action plans and the business-based Pilot Initiatives, as well as to correlate them with visions and paths for a long-term strategy (at least 15 years of distance) of sustainable development.

The following paragraphs present basic explanations on the main properties of:

- Stakeholders
- Local Advisory Groups
- Local Project Groups
- Local Scenario Workshops

Stakeholders

The SLD stakeholders are those concerned by an intensive flow of interrelationships between the civil society bridges (groups and organisations of diverse interests), the public sector functioning (governments, authorities and services) and the constitutive components of the system that act as social, economic and environmental glues.



Interrelationships between the SLD stakeholders are motivated by different but converging interests, towards which the expected impacts of a SLD (Sustainable Life Development) project are addressed.

<i>Stakeholder typology</i>	<i>Expected impacts</i>
Ageing women workers	More and new perspectives for employability, employment and empowerment through changes in workplace, work and life organisation, gender roles and local development while increasing social and environmental awareness
SMEs and larger companies	Better staff motivation Better health work condition More collaboration and support from the public sector through stable and enduring relationships Productivity improvement New markets, more clients and relationships due to a clear commitment to incorporate social and environmental responsibility in business activities
Civil society associations (social, economic and environmental interests)	More visibility and role in the society and in the decision making processes due to the capacity to represent and connect the multi-faceted interests of ageing workers, people at risk of social exclusion, responsible entrepreneurs, environmentally sensitive people More opportunities to improve the delivery capacity
Supporting bodies	More collaborative relationships at a local context Streamlined service delivery for innovation, research and development, equal opportunities, vocational and training systems
Local governments, public authorities and administrations	More visibility and consensus, citizens acknowledgment and legitimisation due to an improvement in competence and responsibility, policy co-ordination and planning procedures, delivery capacity and services' efficiency Reduction of environmental and social pressures More efficacy in public spending also to cope with cuts in financial resources
Citizens, families and communities	A better quality of life through equal opportunities of access to the available resources, including services in the fields of social, cultural, employment, health and development policies More efficient and accountable institutions
Future generations	Opportunities in terms of resources availability to allow them a sound development
The environment	Reduction of natural resources consumption, pollution and so on, respecting biodiversity and ecosystems life

Other stakeholders, even though not directly involved in the specific local systems, are extremely influential in the Sustainable Life Development (SLD) approach, namely:

- regional and national governments
- regional, national and European associations of diverse interests (economic, socio-cultural and environmental)
- the European Union itself since a large amount of actions (policies, strategies, programmes, initiatives) are supported by several sources of assistance and founding (e.g. Structural Funds and the other economic instruments)

Considered as stakeholders of a secondary (or external) level, they are however nested in the relationships developed by the above-mentioned primary (internal) stakeholders.

The primary stakeholders are involved into local groups that support the project teams of the concerned local contexts.

The individual characteristics of these stakeholders are analysed looking at combining different interests, roles, disciplinary backgrounds and professional expertise.

A first analysis of the local stakeholders is at the beginning of a SLD project to constitute the Local Advisory Groups that support both the Local Context Analyses and the elaboration of the related territorial Action Plans.

A second stakeholder analysis is necessary to create the Local Project Groups that support both the Workplace Analyses and the related business Pilot Initiatives.

A final stakeholder analysis aims at verifying and probably enlarging the representation of different interests and points of view in order to carry out the Local Scenario Workshops where some relevant results from the Local Context Analysis and the Workplace Analyses are debated and correlated.

Three questionnaires are available in the on-line SLD system (see Chapter 10) to be downloaded and utilised by the project teams in order to carry out the three different Stakeholder Analyses.

Local Advisory Group (LAG)

The Local Advisory Group (LAG) plays a strategic role in favouring and collaborating to the Local Context Analysis (LCA) and to the elaboration of integrated Action Plans.

The LAG tasks consist mainly in providing advice and suggestions that result in the hypotheses of innovative actions at a territorial level through the integration of employment, social inclusion, corporate social responsibility and governance policies within the perspectives of age and gender management orientated towards sustainable development.

To comply with this role, participants in the LAG are mainly representatives of:

- the public sector (governments, public authorities and administrations)
- supporting bodies (development agencies, equal opportunities committees, universities, research institutes)

- the civil society (business and trade associations, trade unions, women associations, immigrant associations, associations of people with disabilities, volunteer organisations involved in equal opportunities, social inclusion, civil rights, third sector, environmental associations)

LAG is created by the project team of each concerned case study area through a first Stakeholder Analysis supported by a questionnaire based on four criteria to specify the number of stakeholders in terms of organisation and the representative person, generally from a minimum of 5 to a maximum of 15 members.

Organisation	Person
What organisation does the stakeholder represent?	

The "four I's" methodological criteria of stakeholders' involvement (Justice T. and Jamieson D. W., 1999) are adapted to the purposes of a SLD (Sustainable Life Development) project by means of the following matrix that is useful to identify “who” and “why” has more reasons to take part in the LAG activities.

Interest	How strong is her/his interest in the work of the group, fostering decisions and initiatives in relation to specific field of activity?
Influence	How strong is her/his influence to block decisions and initiatives?
Impact	To what extent will she/he be affected by decisions and initiatives?
Information	To what extent does she/he possess data needed to contribute to and facilitate decisions and initiatives
Involvement degree (total of the results)	To what extent is her/his participation important for the work of the group?

The main characteristics of the local stakeholders are examined attributing a score (from 0 to 5) to the above-mentioned criteria:

Interest	Influence	Impact	Information	Involvement degree (total)

Scores can be given individually by the component of the project team and successively weighted for each recurrent organisation and person, summing the total scores and dividing the total for the number of recurrences.

Otherwise a list of organisations and persons can be defined by the components of the project team giving a commonly agreed score between them.

The involvement degree helps to select the relevant stakeholders without excluding organisations (e.g. those of the civil society) that play a key role in the policy fields addressed by a SLD (Sustainable Life Development) project in the concerned local case study areas.

As a general rule, stakeholders receiving less than 10 points are not relevant for the project purposes.

Anyhow this is not a mathematically strict rule and a wise composition should be determined answering the following questions: Who we are going to exclude? Who we are ignoring? What interests are not very well represented?

The involvement degree helps also to assign also a role to each person involved in the LAG.

Generally all members are involved in a similar work together. It is useful, however, to foresee specific roles according to the characteristics of each person in order to foster the LAG commitment in tasks that will be determined step by step.

There can be the following roles: to chair the LAG, to promote the LAG in the local context; to facilitate contacts with other local contexts, organisations, etc.; to help the collection of or to provide information on specific matter; to monitor the activities, to support and communicate with Local Project Group (LPG) members and so on.

Moreover, taking into account all these elements, members can participate in the meetings regularly (permanent member) or occasionally (temporary member) because they are called only for specific matters.

Person	Role : Chair, Promotion, Contacts, Information, Monitoring, LPG, other (specify)	Participation: Permanent, Occasional

Local Project Group (LPG)

The Local Project Group (LPG) plays a key role in favouring and collaborating to the Workplace Analysis (WA) and to the elaboration of Pilot Initiatives.

The LPG tasks consist mainly in providing advice and suggestions that result in the hypotheses of innovative actions at a business level to plan for example operational activities in the fields of age, gender and human resource management, work organisation, collective bargaining agreements, lifelong learning, vocational guidance and training, social insertion.

To comply with this role, participants in the LPG are local experts and practitioners mainly coming from:

- the public sector (administrative departments and delivery services)
- the private sector (companies of a relevant excellence)
- supporting bodies (development agencies, equal opportunities committees, universities, research institutes, business, technology and innovation centres)
- the civil society (business and trade associations, trade unions, women associations, immigrant associations, associations of people with disabilities, volunteer organisations involved in equal opportunities and social inclusion policies, civil rights, third sector, environmental associations)

LPG is created by the project team of each concerned case study area through a second Stakeholder Analysis supported by consultation with the Local Advisory Group and by a questionnaire that examines the main characteristics of existing relevant bodies.

The LPG questionnaire addresses specific criteria utilised also to specify the number of stakeholders, generally from a minimum of 5 to a maximum of 10 members.

The questionnaire concern both the stakeholder organisation and its representative person.

Obviously also a very important person can be identified to take part in the LPG because she/he has a proven expertise. However this interesting condition is very limited in practise since a relevant capacity of relationships with the local entrepreneurial fabric and a visible role in the society are requested in order to contribute to the Workplace Analysis gathering consensus from the part of the other concerned stakeholders. In this case, the questionnaire is used without filling in the questions concerning a stakeholder organisation.

Five main methodological criteria of stakeholders' involvement are used in the LPG questionnaire.

Organisation	Person
What are the field of activity and interests represented?	

Disciplinary background	What are the specific fields of knowledge and expertise of the person?
Organisational role	What role is played by the person involved in LPG in her/his organisation (stakeholder)?
Excellence	How consistent is the expertise of the stakeholder organisation and the person?
Relevance	How significant is the role played by the stakeholder organisation and the person with respect to the Workplace Analysis?

Being determined by information regarding all the above-mentioned characteristics, the decision on the stakeholder involvement in the LPG is taken by attributing a score (from 0 to 5) to the two final criteria:

Excellence	Relevance	Involvement degree (total)

Scores can be given individually by the component of the project team and successively weighted for each recurrent organisation and person, summing the total scores and dividing the total for the number of recurrences.

Otherwise a list of organisations and persons can be defined by the components of the project team giving a commonly agreed score between them.

As a general rule, stakeholders receiving less than 5 points are not relevant for the project purposes.

Questionnaire example:

<p>Stakeholder organisation Name, Address, Telephone, Fax, e-mail</p>
<p>Person Name, Address, Telephone, Fax, e-mail</p>
<p>Stakeholder typology and field of activity and interest</p>
<p>Governments, public authorities and administrations:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employment <input type="checkbox"/> Social and health affairs <input type="checkbox"/> Education and Culture <input type="checkbox"/> Economy <input type="checkbox"/> Spatial planning <input type="checkbox"/> Environment <input type="checkbox"/> Sustainable Development <input type="checkbox"/> Research & Development
<p>Companies:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Large manufacturing and trading companies <input type="checkbox"/> Small – medium sized manufacturing and trading companies
<p>Association and organisations:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Business and trade <input type="checkbox"/> Artisans <input type="checkbox"/> Farmers <input type="checkbox"/> Trade unions <input type="checkbox"/> Women <input type="checkbox"/> Immigrants <input type="checkbox"/> People with disabilities <input type="checkbox"/> Equal opportunities <input type="checkbox"/> Civil rights <input type="checkbox"/> Third sector <input type="checkbox"/> Environmental and ecological interests <input type="checkbox"/> Social and cultural interests
<p>Supporting bodies:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Equal Opportunities Committees <input type="checkbox"/> Chambers of commerce <input type="checkbox"/> Business, technology and innovation centres <input type="checkbox"/> Universities <input type="checkbox"/> Research institutes

<i>Disciplinary background of the contact person: fields of knowledge and expertise</i>
<input type="checkbox"/> Local development and employment initiatives
<input type="checkbox"/> Support to local projects (business creation, technical assistance, etc.)
<input type="checkbox"/> Social services
<input type="checkbox"/> Social inclusion
<input type="checkbox"/> Health services
<input type="checkbox"/> Social transport
<input type="checkbox"/> Retail services
<input type="checkbox"/> Equal opportunities and gender
<input type="checkbox"/> Immigration
<input type="checkbox"/> Cultural harmonisation
<input type="checkbox"/> Reconciliation of work, family and social times
<input type="checkbox"/> Work organisation and organisational behaviour
<input type="checkbox"/> Human resources' management
<input type="checkbox"/> Industrial relations and collective bargaining agreements
<input type="checkbox"/> Training and lifelong learning
<input type="checkbox"/> Economic diversification and restructuring
<input type="checkbox"/> Strategic planning
<input type="checkbox"/> Development of relationships with other communities
<input type="checkbox"/> Information diffusion and exchange of good practices
<input type="checkbox"/> Promotion of networking and partnership
<input type="checkbox"/> Territorial marketing
<input type="checkbox"/> Corporate marketing
<input type="checkbox"/> Social marketing
<input type="checkbox"/> Research and development
<input type="checkbox"/> Transfer of technology
<input type="checkbox"/> Quality management
<input type="checkbox"/> Quality certification (ISO, EMAS, SA 8000, etc.)
<input type="checkbox"/> Customer services (client satisfaction, etc.)
<input type="checkbox"/> Environmental research, development and monitoring
<input type="checkbox"/> Biodiversity
<i>Organisational role of the contact person</i>
<input type="checkbox"/> Strategic top level
<input type="checkbox"/> Middle level
<input type="checkbox"/> Operative level

Local Scenario Workshop (LSW)

The Local Scenario Workshop (LSW) plays a key and final role to determine shared visions and paths in a long term perspective (15 years of distance) connecting the results of Action Plans and Pilot Initiatives.

The participants in the LSW are requested to formulate their own hypotheses of innovative actions as guidelines for future plans.

LSW is not a permanent group, but it constitutes a central step to enlarge the points of view on the age and gender management strategies orientated towards sustainable development.

Participants in the LSW are partly (e.g. 2/3) the stakeholders already involved in LAG and LPG and partly (e.g. 1/3) new people whose interests are recognised relevant to formulate new visions and paths: for instance, older women workers themselves, NGOs and other volunteer organisations not previously involved in the project activities.

The LSW composition can be variable but within a suggested ceiling of 20 – 25 people that allows the project team to perform the visioning exercises in a right and fruitful way.

To this end, the project team, supported by consultations with the LAG and the LPG, carries out a final Stakeholder Analysis, answering to a main question: Who was excluded from the debate and why?

The Stakeholder Analysis is based on a questionnaire that takes into account issues and lessons derived from the experimentation with the LAG and LPG, namely:

- diversity and overlap between LAG and LPG members
- women participation
- stakeholder involvement and contribution to the project

Summary

This Chapter explains how to involve the local stakeholders in the main operational phases of a SLD (Sustainable Life Development) project.

Stakeholder Analysis (SA)	Purposes	Expected results
<p>Three separate Stakeholder Analyses are necessary to identify organisations and persons according to the differentiated roles played by three different groups that support the SLD project phases.</p> <p>Each Stakeholder Analysis is supported by specific questionnaires and procedures.</p>	<p>To constitute a Local Advisory Group aimed at supporting the project team to carry out a Local Context Analysis and to elaborate a territorial Action Plan</p>	<p>Involvement and participation of local representatives of economic, social, cultural and environmental interests</p>
	<p>To constitute a Local Project Group in order to support the project team to perform a Workplace Analysis and to define business Pilot Initiatives</p>	
	<p>To perform a Local Scenario Workshop aimed at correlating the results of Local Context Analysis and Workplace Analysis through shared visions and paths in a long-term perspective</p>	

Next Chapters explain how to carry out the operational phases, which main purposes and expected results are summarised in the following table.

Chapter and Phases	Purposes	Expected results
Chapter 7: Action Plans	To utilise all the available potentials towards a Sustainable Life Development through a Local Context Analysis (LCA) on interesting projects and the characteristics of the territory under study	Main hypotheses of innovative actions to integrate as series of policies in order to improve the impacts of age and gender management on the concerned local systems. Collection of information and data referred to indicators that support the implementation of territorial Action Plans
Chapter 8: Pilot Initiatives	To reconcile work, family and social times towards a Sustainable Life Development through a Workplace Analysis (WA) that concerns a sample of different companies and a sample of ageing women workers in the territory under study	Based also on the ongoing results of the LCA, main hypotheses of innovative actions to integrate services and activities devoted to improve the impacts of age and gender management on the concerned corporate systems. Collection of information and data referred to indicators that support the implementation of business Pilot Initiatives
Chapter 9: Local Scenario Workshop (LSW)	To determine shared visions and paths to correlate Action Plans and Pilot Initiatives in a long term (15 years) perspective towards a Sustainable Life Development	An overarching picture of future development while simplifying, verifying and integrating the hypotheses of innovative actions at business and territorial levels

The expected results (e.g. hypotheses of innovative actions, information and data) of Action Plans, Pilot Initiatives and the Local Scenario Workshops are elaborated following the procedures presented in the on-line (Internet-based) SLD system (see Chapter 10), which allows the project team and the concerned stakeholders to have both detailed and summarised reports.

CHAPTER 7: ACTION PLANS

Introduction

The Sustainable Life Development (SLD) approach aims at improving the capacity of local stakeholders to define innovative “flexicurity” strategies for age and gender management through fluid interrelationships and integration between different policy fields in a territorial system.

Action Plans contain hypotheses of innovative actions at a territorial level while considering five main strategies: Employment, Social inclusion, Sustainable Development, Corporate Social Responsibility and Governance.

Action Plans derive from an analysis on the overall features of local contexts and key initiatives. The Local Context Analysis is carried out by the project team, in consultation with the stakeholders involved in the Local Advisory Group (Chapter 6).

The analysis relies on 32 aspects:

- 10 regard the Orientation towards SLD (What, Why and How)
- 16 concern the Social Potential of the local contexts (Who) expressed in terms of Institutional Capital, Human Capital and Social Capital
- 6 regard the Dynamics of change (When) combining the quality of local projects with the characteristics of the local contexts

A specific Descriptor is formulated for each SLD aspect along with a series of Indicators to facilitate a more in depth analysis of the concerned local context, as well as to monitor the impacts of the innovative actions once they are put into operation.

The following paragraphs are dedicated to describe the:

- Local Context Analysis
- Orientation descriptors and indicators
- Social Potential descriptors and indicators
- Dynamics descriptors and indicators
- Action Plan structure

Local Context Analysis

In each local case study area, the project team (researchers), in consultation with the stakeholders involved in the Local Advisory Group (Chapter 6), analyses Strengths, Weaknesses, Opportunities and Threats (SWOT) of territorial features and key initiatives (projects, plans and programmes) to answer the questions “What and Why” (Chapter 1), “How and When” (Chapter 2) and “Who” (Chapter 3) of the Sustainable Life Development (SLD) approach.

The SLD / SWOT analysis is a qualitative analysis that:

- is based on intuition, ability to be concise, to have a comprehensive picture of systems and processes, as well as on creativity and problem solving
- allows the project teams and the associated Local Advisory Groups (LAG) to express their opinions while respecting different points of views
- facilitates aggregation of identical and similar evaluations weighting the scores given by the participants in the analysis
- allows different perceptions and opinions to converge towards suitable combinations and shared solutions

Strengths and Weaknesses, Opportunities and Threats refer to different temporal scales and to their actuality or potentiality (what exists and what could exist):

- actual conditions are listed as Strengths and Weaknesses
- predictable future situations are listed as Opportunities and Threats

Combining the perceptions of the future situations (Opportunities and Threats) with those of the actual conditions (Strengths and Weaknesses), both researchers and stakeholders are stimulated to look at the near / probable future in order to determine hypotheses that improve the present situations and anticipate favourable changes.

Once the hypotheses are defined, they are supported by data necessary to quantify the indicators used by the SLD approach.

The procedures to perform the SLD / SWOT analysis are facilitated by the on-line (Internet-based) SLD system (see Chapter 10) through specific forms to be filled in by:

- researchers and stakeholders to assess individually Strengths and Weaknesses, Opportunities and Threats for each of the 32 SLD aspects (Step 1)
- researchers and stakeholders to define individually hypotheses of innovative actions for each of the 32 SLD aspects (Steps 2 and 3)
- researchers and stakeholders to merge individually the hypotheses of innovative actions concerning each of the 32 SLD aspects (Step 4)
- researchers to aggregate all individually defined assessments and innovative actions (Step 5)
- researchers to store data concerning the indicators of each SLD aspect (Step 6)

The six steps are described more in depth as follows by explaining the basic procedures of a SLD / SWOT analysis.

Step 1: assessing individually Strengths, Weaknesses, Opportunities and Threats for each of the 32 SLD aspects

Short forms with few rows allow the respondent (being a component of the project team or the Local Advisory Group) to write concise sentences adopting the “key words” technique.

The key words must express assessment on the specific issue taken into account by the respondent:

- characteristics of the local context under examination
- characteristics of a project, plan and programme existing there

The assessment of these issues must be made carefully reading the Descriptor of the SLD aspect that is reported at the opening of four forms concerning its Strengths, Weaknesses, Opportunities and Threats.

The forms appear subsequently and are filled in separately to avoid bias and decrease in creativity and intuition because of drag effects determined by looking at what was written before. However there is possibility to improve what was written in a specific form reopening it at the respondent best convenience.

Generally each separate form takes about five minutes of time to be filled in. This time is enough to avoid that wordy formulation exceeds in useless details against the opportunity given to complete all the rows with the assessment of other issues.

The assessments do not have obviously the same importance with respect to the issues (e.g. the local context features, a project, a plan or a programme) taken into consideration. For instance not all the Strengths are strong at the same degree. Therefore, a score must be attributed to each assessment phrase by the respondent according to a scale of importance from 1 (very low) to 5 (very high) points. The individual scores depend on the respondent knowledge of the territorial area and its dynamics.

Example: Environment	
<i>Descriptor: The SLD approach addresses</i>	
<i>Strengths</i>	<i>Score</i>
Availability of consistent natural resources	2
Beautiful landscape	3
Life project on biodiversity	5
Healthy urban spaces	1
Project on sustainable transportation	4

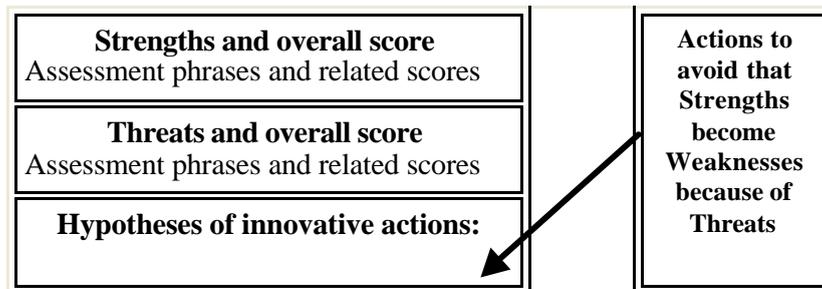
The relative weight of the Strengths, Weaknesses, Opportunities and Threats related to each SLD aspect allows the respondent to focus her/his attention on how to improve the current situation through the identification of hypotheses of innovative actions.

The method consists on confronting Strengths and Threats on one hand, and Weaknesses and Opportunities on the other hand.

Steps 2 and 3: defining individually hypotheses of innovative actions concerning each of the 32 SLD aspects

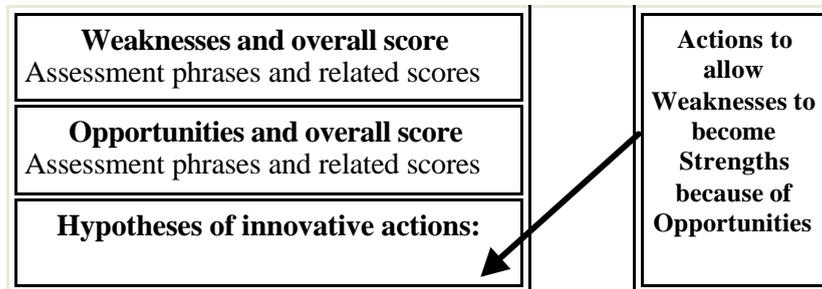
Hypotheses for innovative actions derive from considering how the Strengths (S) can overcome Threats (T) to avoid becoming Weaknesses (W).

To this end, the results of Step 1 are presented to the respondent through a form where she/he can read both the assessment phrases and the related scores in order to write the actions according to the formula: **S+T # W**



Other hypotheses derive from the capacity of utilising the identified Opportunities (O) as driving forces to transform Weaknesses (W) into Strengths (S).

To this end, the results of Step 1 are presented to the respondent through a form where she/he can read both the assessment phrases and the related scores in order to write the actions according to the formula: **W+O = S**



Hopefully a comprehensive hypothesis should be written looking at the overall results concerning Strengths and Threats and comparing them. Similarly, a comprehensive hypothesis should derive from the analysis and comparison of the overall results concerning Weaknesses and Opportunities.

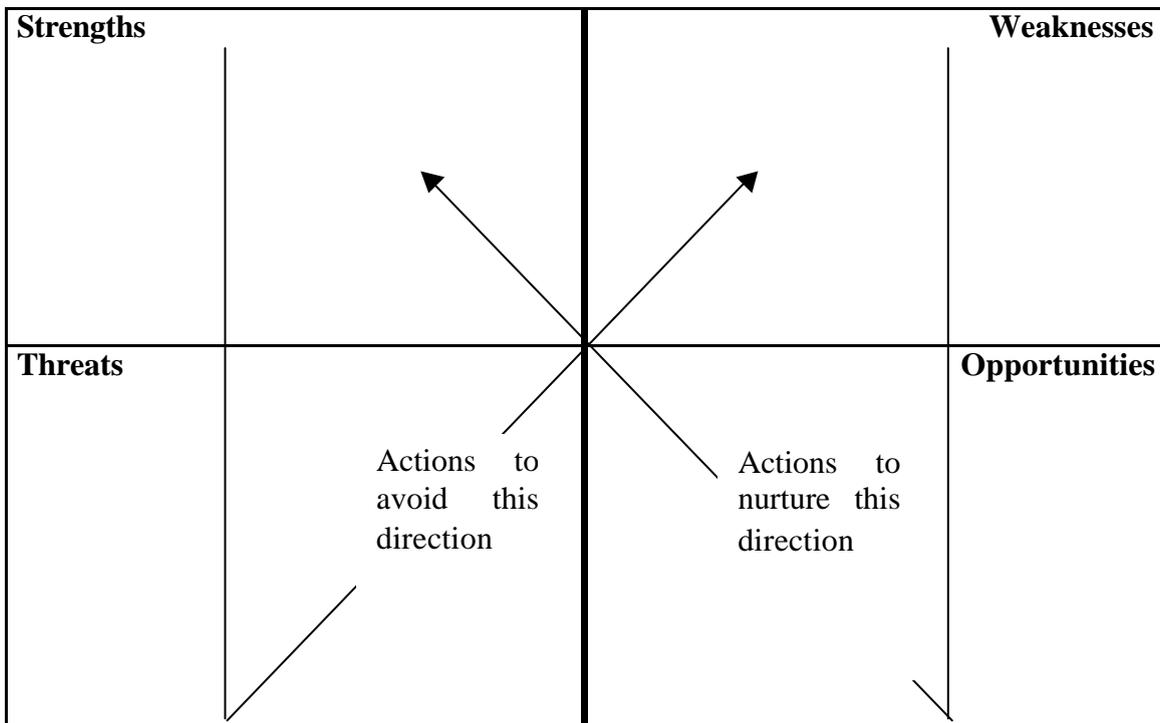
The challenging effort is to construct leading hypotheses supported by coherent courses of actions with examples in brackets and aggregation formulae (like “for example, in particular, with attention to ...”).

The hypotheses must be introduced by a verb since it facilitates to perceive an action (e.g. to promote, to create, to foster, to facilitate).

Generally about ten – fifteen minutes of time are necessary to conceive and write a comprehensive hypothesis utilising a pro-active creativity that looks at the future without being influenced by prejudices, conventional thinking and past experiences.

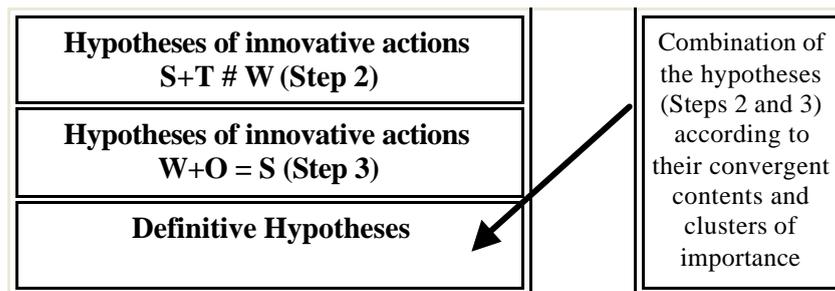
Step 4: merging individually the hypotheses of innovative actions concerning each of the 32 SLD aspects

Steps 2 and 3 give the following results:



These results must be further combined.

A final form presents the results of Step 2 and 3, allowing the respondent to compare the hypotheses of innovative actions in order to combine those that are similar and to cluster those that have a common end.



Step 5: aggregating all the individually defined assessments and innovative actions

Both the components of the project team (researchers) and the Local Advisory Group (stakeholders) fill in the forms already mentioned. Therefore a large number of respondents produces a large number of analyses more or less with a similar degree of completeness.

The project team examines and aggregates the individual results (assessment phrases, scores and hypotheses of innovative actions) according to their similarity, difference and converging paths.

The following form allows the project team to further work out the contents of the related hypotheses in terms of:

Short description = Purpose
Expected results
Financial and organisational measures

The several contents of each hypothesis can be in fact better constructed:

- some of them play an overarching role more than others in term of purposes and aims; therefore contribute to the short description
- some of them describe expectations and probable results; therefore they can be utilised to identify the expected results
- some of them consider more practical issues than others looking for money, structures, systems and specific arrangements or procedures; therefore they can be utilised to focus the attention on concrete measures both of a financial and organisational nature

The final result for each of the 32 SLD aspects consist of an aggregated SLD / SWOT analysis with the associated hypotheses of innovative actions.

Step 6: storing data concerning Indicators of each SLD aspect

Assessments and innovative actions are supported by specific Indicators.

Indicators are included in forms that concern each of the 32 SLD aspects. The project team (researchers) store data in the appropriate forms.

Indicators are identified taking into account both the Sustainable Development Indicators (SDI) elaborated by the European Commission (CEC, 2005e) and the specificity of the concerned local systems.

The reference to the Sustainable Development Indicators (SDI) is extremely useful since they coherently stimulate integrated policies and monitor progress achieved towards policy goals and objectives.

SDI address in fact ten themes that represent the most important challenges and strategies to be further developed in the future:

- economic development (to bridge the Lisbon process to Sustainable Development)
- poverty and social exclusion (Lisbon, 2000)
- ageing society (Lisbon, 2000)
- public health (Gothenburg, 2001)
- climate change and energy (Gothenburg, 2001)
- production and consumption patterns (Johannesburg World Summit on Sustainable Development, 2002)
- management of natural resources (Gothenburg, 2001)
- transport (Gothenburg, 2001)
- good governance (Johannesburg World Summit on Sustainable Development, 2002)
- global partnership (UN, Millennium Declaration, 2000)

The following paragraphs go into detail reporting for each of the 32 SLD aspects:

- the Descriptor utilised to carry out the SLD / SWOT analysis
- the selected Indicators to find out appropriate data associated with the Descriptor

SLD ORIENTATION: Descriptors and Indicators

The SLD approach answers the following question: **Which direction should be given to the development of territorial systems?**

What do we want to sustain?	The integration between three Development Dimensions : <ul style="list-style-type: none"> • The environment • Economy • Socio-culture
Why do we want to sustain it?	To integrate three Equity Dimensions <ul style="list-style-type: none"> • Equity between individuals • Equity between territories • Equity between generations
How do we want to sustain it?	Through the integration of four Systemic Principles : <ul style="list-style-type: none"> • Diversity • Subsidiarity • Networking / Partnership • Participation

The following descriptors and indicators underline the main issues to be considered.

OR1. Environment (What)	
<i>Descriptor</i>	
Sustainable Life Development (SLD) orients life styles towards: <ul style="list-style-type: none"> ▪ Reduction of natural resource consumption, Reutilisation of products, Recycling of products, spare parts, semi-products and wastes (“3 R” principle to protect the ecosystems) ▪ Dissemination of clean technologies, products and processes ▪ Pollution prevention and reduction ▪ Utilisation of renewable sources of energy ▪ Housing quality 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Total area	Km2
Total inhabitants	Number
Population density	Inhabitants / km2
Agriculture and rural area	Percentage over total area
Urban and industrialised area	Percentage over total area
Protected natural area	Percentage over total area
Total residual household waste	Tonnes per year
Residual household waste per inhabitant	Kg / inhabitants per year
Total residual non-household waste	Tonnes per year
Residual non-household waste per unit GDP	Index (Tonnes / GDP millions of Euro) per year
Total energy consumption in all sectors	Toe (tonnes of oil equivalent) per year
Total energy consumption per unit GDP	Index (Toe / GDP millions of Euro) per year
Total energy consumption per inhabitant	Toe / inhabitants per year
Energy consumption in industrial sector	Toe per year
Energy consumption in other sectors (agriculture + services + household)	Toe per year
Energy consumption in transport sector	Toe per year

<i>Key indicators</i>	<i>Unit of measurement</i>
Total emissions of the 6 greenhouse gases covered by the Kyoto Protocol	Indices (base year 1990 = 100) on aggregated CO2 equivalents
Total CO2 production	Tonnes per year
Total CO2 production per inhabitant	Tonnes per inhabitant per year
Average water quality	Extended Biotic Index (I-IV) per year
Population living in households affected by noise from neighbours or outside or by pollution due to traffic or industry	Percentage over total population per year
Electricity produced from renewable energy sources (hydro plants, wind, solar, geothermal and biomass/wastes)	Ratio between the electricity produced from renewable energy sources and the gross national electricity consumption per year

OR2. Economy (What)	
<i>Descriptor</i>	
Sustainable Life Development (SLD) orients life styles towards:	
<ul style="list-style-type: none"> ▪ Active labour market policies to enable women to enter, remain in or return to employment ▪ Integration of the value of unpaid work, generally designated "domestic", in resource accounting mechanisms in order better to represent the contribution of women to the economy ▪ Quality employment in activities aimed at safeguarding the ecosystems, developing environmentally sound products and processes ▪ Accessibility to goods, services, people and places lessening the environmental, social and health costs ▪ Integration of the environmental, social and health costs in the economy 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Total GDP	Euro per year
Total companies in all sectors	Number per year
Companies in Agriculture	Number per year
Companies in Industry	Number per year
Companies in Services	Number per year
Total Employment in all sectors	Number per year
Employment in Agriculture	Number per year
Employment in Industry	Number per year
Employment in Services	Number per year
Estimate of employment in environmental friendly technologies, products and processes	Percentage over total employment per year
Self-employed (men and women)	Percentage over total employment per year
Part-time employed (men and women)	Percentage over total employment per year
Fixed term contracts(men and women)	Percentage over total employment per year
Women employment	Number per year
Women employment	Percentage over Total Employment per year
Women employment in Agriculture	Percentage over Employment in Agriculture per year
Women employment in Industry	Percentage over Employment in Industry per year
Women employment in Services	Percentage over Employment in Services per year

<i>Key indicators</i>	<i>Unit of measurement</i>
Self-employed women	Percentage over Self-employed per year
Women part-time employed	Percentage over Part-time employed per year
Women with fixed term contracts	Percentage over fixed term contracts per year
Estimate of women in (domestic) unpaid work	Number per year
Estimate of the contribution of unpaid women work to the economy	Percentage of the value of unpaid work over total GDP per year
Road congestion, traffic jams and time loss	Average number of traffic jams-hours per inhabitant per year
Overcrowded public transport	Average number of crowding-hours per inhabitant per year
Passenger transport by cars	Modal split in percentage of passenger – kilometre (P-km) per year
Passenger transport by buses	Modal split in percentage of passenger – kilometre (P-km) per year
Passenger transport by trains	Modal split in percentage of passenger – kilometre (P-km) per year
Freight transport by road	Modal split in percentage of tonnes – kilometre (T-km) per year
Freight transport by rail	Modal split in percentage of tonnes – kilometre (T-km) per year
Freight transport by water (sea and inland waterways)	Modal split in percentage of tonnes – kilometre (T-km) per year
Freight transport by air	Modal split in percentage of tonnes – kilometre (T-km) per year
Passenger transport intensity per unit GDP	Index (P-km / GDP Euro) per year
Freight transport intensity per unit GDP	Index (T-km / GDP Euro) per year
Passenger transport intensity per inhabitant	P-km per inhabitant per year
Freight transport intensity per inhabitant	T-km per inhabitant per year
Usage of Internet-based communication systems	Percentage of Internet users over the overall population per year
Health care expenditure	Percentage of total sickness / health care expenditure over total GDP per year
Estimate of environmental and social costs due to damages caused by economic activities	Percentage of total external costs over total GDP per year
Estimate of environmental and social costs due to transport	Percentage of total external costs over total GDP per year

OR3. Socio-culture (What)	
<i>Descriptor</i>	
Sustainable Life Development (SLD) orients life styles towards:	
<ul style="list-style-type: none"> ▪ Increase in availability of human resources along the entire population life cycle ▪ Reduction in intimidation and discrimination, sexual harassment against women ▪ Abatement of gender barriers and stereotypes in employment policies ▪ Reduction of unemployed people ▪ Increase in people participation in the labour market ▪ Increase in people literacy and education ▪ Dissemination of knowledge and expertise on environmental issues and sustainable development ▪ Dissemination of knowledge and expertise on gender policies 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Total population	Number per year
Women	Number per year
Men	Number per year
Women life expectancy	Number of years a person may be expected to live, starting at age 0
Men life expectancy	Number of years a person may be expected to live, starting at age 0
Intimidation, discrimination and sexual harassment against women	Number of actions brought before the Court per year
Total of unemployed persons	Number per year
Unemployed women	Number per year
Unemployed men	Number per year
Total unemployment rate	Percentage of unemployed persons over total labour force per year
Total population aged 15 – 64	Number per year
Women aged 15 – 64	Number per year
Men aged 15 – 64	Number per year
Total activity rate in population aged 15-64	Percentage of persons aged 15-64 enrolled as labour forces over a same age population per year
Drop-out rate of upper secondary schools	Percentage over total student population in upper secondary schools per year
High school degree	Percentage over population per year
University degree	Percentage over population per year
Lifelong learning	Percentage of persons aged 25 – 64 who stated to have received education or training over total population of the same age group per year
Education and training programmes on the environment and sustainable development	Number per year
Education and training programmes on gender policies	Number per year

OR4. Social equity / between individuals (Why)	
<i>Descriptor</i>	
<p>Sustainable Life Development (SLD) orients life styles towards:</p> <ul style="list-style-type: none"> ▪ Equal opportunities between men and women (employment, pay, access to education and other services) ▪ Increase in the proportion of women in decision making processes ▪ Pro-active measures to prevent life crises and risks of social exclusion while helping the most vulnerable persons (children, elderly, those with different abilities, immigrants, nomads, those with particular forms of dependency) ▪ Social support systems and services to ensure child care and day-care facilities ▪ Reconciliation between working and “non-working” life supported by a more suitable organisation of “social time” (school, services, stores and shops, leisure activities, etc.) ▪ Safety measures both at work and in physical mobility 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Women activity rate in population aged 15-64	Percentage of women aged 15-64 enrolled as labour forces over a same age women population per year
Men activity rate in population aged 15-64	Percentage of men aged 15-64 enrolled as labour forces over a same age men population per year
Women unemployment rate (unemployed persons comprise persons aged 15 to 74)	Percentage of unemployed women over total women labour force per year
Men unemployment rate (unemployed persons comprise persons aged 15 to 74)	Percentage of unemployed men over total men labour force per year
Women who have been unemployed for one year or more (long-term unemployment , LTU)	Percentage of LTU women over total women labour force per year
Men who have been unemployed for one year or more (long-term unemployment , LTU)	Percentage of LTU men over total men labour force per year
Gender pay gap on the average gross hourly earnings of men and women employees aged 16-64 at work 15+hours per week	Percentage of the difference between men and women earnings over the men earnings per year
Women drop-out rate of upper secondary schools	Percentage over women student population in upper secondary schools per year
Men drop-out rate of upper secondary schools	Percentage over men student population in upper secondary schools per year
Women high school degree	Percentage over women population per year
Men high school degree	Percentage over men population per year
Women with university degree	Percentage over women population per year
Men with university degree	Percentage over men population per year
Companies directed by women	Percentage over the number of companies per year
Women in local government	Percentage over total persons in local government per year
Inequality of equalised disposable income distribution: comparison between highest (top quintile) and lowest (lowest quintile) income	Ratio of total income received by the 20% of the population with the highest income to that received by the 20% of the population with the lowest income

<i>Key indicators</i>	<i>Unit of measurement</i>
Persons at risk-of-poverty after social transfer	Percentage of persons below the 60% of the national median equivalised disposable income (social transfers included) over total population per year
Public average expenditure for social inclusion / services per inhabitant	Amount in EURO per inhabitants and per year
Share of social inclusion / services expenditure devoted to family and minors	Percentage over the total public expenditure for social inclusion / services per year
Share of social inclusion / services expenditure devoted to elderly persons	Percentage over the total public expenditure for social inclusion / services per year
Share of social inclusion / services expenditure devoted to disabled persons	Percentage over the total public expenditure for social inclusion / services per year
Share of social inclusion / services expenditure devoted to persons with particular forms of dependency (e.g. drug, alcohol)	Percentage over the total public expenditure for social inclusion / services per year
Share of social inclusion / services expenditure devoted to immigrants and nomads	Percentage over the total public expenditure for social inclusion / services per year
Child care facilities	Percentage of children admitted to crèches and nurseries over the number of same age children
Elderly people care facilities	Number of persons aged 75+ per beds available in day-care centres for elderly people
Social (city)-time organisation plans	Number per year
Serious accident at work (with more than 3 days' absence)	Percentage of persons affected by serious at-work-accidents over the number of employed persons per year
Death and injury related to traffic accidents	Percentage of persons affected by traffic accidents over total population per year

OR5. Inter-local equity / between territories (Why)	
<i>Descriptor</i>	
Sustainable Life Development (SLD) orients life styles towards: <ul style="list-style-type: none"> ▪ Balanced inter-local development ▪ Fair and solidarity relationships between different local communities ▪ Dissemination of connecting high technology systems to facilitate economic and socio-cultural exchanges 	
<i>Key indicators</i>	<i>Unit of measurement</i>
GDP per inhabitant (Euro)	Euro per year
Immigration	Number per year
Immigration	Percentage of immigrants over total local population per year
Emigration	Number per year
Emigration	Percentage of emigrants over total local population per year
Internet – based networks between the concerned territory and other local communities	Number per year
Projects on fair trade	Number per year

OR6. Inter-temporal equity / between generations (Why)	
<i>Descriptor</i>	
Sustainable Life Development (SLD) orients life styles towards: <ul style="list-style-type: none"> ▪ Equal opportunities between generations without gender discrimination ▪ Education to nourish integration between generations of different cultures ▪ Studies and strategic impact assessment on projects (long-term risks and damaging changes) considering conservation and development of environmental resources 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Population below 15 years	Percentage over total population per year
Population above 65 years	Percentage over total population per year
Average dependency ratio	Percentage of 0-14 and 65 – over aged people over population aged 15 –64 per year
Old-age dependency ratio	Percentage of elderly persons (aged 65 and over) over population aged 15 –64 per year
Expenditure on care allowance, accommodation and assistance for elderly	Percentage share of social protection and security expenditure devoted to old age care in GDP per year
Expenditure on care allowance, facilities and assistance for children	Percentage share of social protection and security expenditure devoted to children care in GDP per year
Women activity rate in population aged 55-64	Percentage of women aged 55-64 enrolled as labour forces over a same age women population per year
Women activity rate in population aged 25-54	Percentage of women aged 25-54 enrolled as labour forces over a same age women population per year
Women activity rate in population aged 15-24	Percentage of women aged 15-24 enrolled as labour forces over a same age women population per year

<i>Key indicators</i>	<i>Unit of measurement</i>
Men activity rate in population aged 55-64	Percentage of men aged 55-64 enrolled as labour forces over a same age men population per year
Men activity rate in population aged 25-54	Percentage of men aged 25-54 enrolled as labour forces over a same age men population per year
Men activity rate in population aged 15-24	Percentage of men aged 15-24 enrolled as labour forces over a same age men population per year
Immigrant pupils	Number immigrant aged 0-14 per year
Immigrant pupils over total immigrants	Percentage of immigrant aged 0-14 over total immigrants per year
Immigrant pupils in primary schools	Percentage over total pupils in primary school per year
Public spending debt per inhabitant	Euro per year
Projects submitted to strategic environmental impact assessment	Number of assessments carried out per year

OR7. Diversity (How)

Descriptor

Sustainable Life Development (SLD) orients life styles towards:

- Innovation and diversification in economy and socio-culture, propelled by merging endogenous with exogenous resources
- Local identities and fabrics (traditions, arts and crafts, biodiversity, habitat, socio-cultural heritage, economy vocations, etc.)

<i>Key indicators</i>	<i>Unit of measurement</i>
Women immigration	Percentage of women immigrants over total immigration per year
Immigration from European Union (EU 25)	Percentage over total immigrants per year
Immigration from Europe non EU 25	Percentage over total immigrants per year
Immigration from Africa	Percentage over total immigrants per year
Immigration from America	Percentage over total immigrants per year
Immigration from Asia	Percentage over total immigrants per year
Immigration from Oceania	Percentage over total immigrants per year
Projects on Biodiversity	Number of programmes and plans per year
Businesses with local origin certification	Number of certified businesses per year

OR8. Subsidiarity (How)	
<i>Descriptor</i>	
<p>Sustainable Life Development (SLD) orients life styles towards capacity building and empowerment of local communities through:</p> <ul style="list-style-type: none"> ▪ Additional resources to the spending of local authorities without replacing their own structural revenue while nourishing devolution of public responsibilities ▪ Involvement of civil society in service delivery (e.g. management of proximity services like home care for families and for the elderly, day care for young children, social housing services and so on) ▪ Improvement and creation of local networks of production, distribution and consumption ▪ Integration of top-down and bottom-up approaches in streamlined decision making processes 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Devolution of public responsibilities and financial resources to Municipalities	Percentage of financial resources transferred by the State and Region over total public revenue available in the concerned territory per year
Involvement of civil society in social services' delivery	Number of associations to which service delivery is assigned per year
Involvement of civil society in cultural services' delivery	Number of associations to which service delivery is assigned per year
Involvement of civil society in environmental services' delivery	Number of associations to which service delivery is assigned per year
Local networks, associations and groups for responsible (e.g. green and social) procurement and consumption	Number per year
Institutional arrangements to integrate larger and small dimensions, higher and lower levels of decision making	Number of institutional arrangements per year

OR9. Networking and partnership (How)	
<i>Descriptor</i>	
<p>Sustainable Life Development (SLD) orients life styles towards:</p> <ul style="list-style-type: none"> ▪ Improvement and creation of relational networks (e.g. women associations, NGOs) ▪ Networked organisations (e.g. consortia between businesses) ▪ Alliances and collaboration between public, private and social sectors especially in employment, training, education, social services ▪ Exchange of experiences and good practice of sustainable development between different local and regional contexts 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Business and trade associations	Number per year
Trade unions	Number per year
Women associations	Number per year
Immigrant associations	Number per year
Family and children associations	Number per year

<i>Key indicators</i>	<i>Unit of measurement</i>
Associations of persons with different abilities (otherwise called disabled)	Number per year
Associations for equal opportunities, civil rights and social inclusion	Number per year
Environmental associations	Number per year
Consortia between companies	Number per year
Consortia between social enterprises (otherwise called third sector)	Number per year
Partnerships between public, private and social agencies in projects concerning sustainable development, employment, training, education and social inclusion policies and services	Number of projects per year
Partnerships between different Municipalities to provide co-ordinated service delivery in employment, training and social inclusion policies	Number of services' partnerships per year
Exchange of good practices in sustainable development, employment, training, education and social inclusion policies and services	Number of projects per year

OR10. Participation (How)

Descriptor

Sustainable Life Development (SLD) orients life styles towards:

- Increase in awareness on policies for age and gender management, labour and social inclusion, corporate social responsibility and sustainable development
- Involvement of the stakeholders since the early beginning in the analysis of territorial and corporate problems and in the elaboration of adequate solutions

<i>Key indicators</i>	<i>Unit of measurement</i>
Public awareness campaigns related to social inclusion, gender issues, civil and work rights	Number per year
Public awareness campaigns related to sustainable development and corporate social responsibility	Number per year
Forums and other organisational mechanisms to involve stakeholders in decision making	Number per year
Forums and other organisational mechanisms to involve workers in decision making referred to corporate strategies	Number per year
Participation of women in all the above mentioned forums and other organisational mechanisms	Estimate average percentage of women over all the members of all the above-quoted forums and organisational mechanisms per year

SLD SOCIAL POTENTIAL: Descriptors and Indicators

The SLD approach answers the following question: **Which societal capacity should be built to follow the SLD Orientation?**

Who? Institutional Capital (IC)	Capacity of government
Who? Human Capital (HC)	Capacity of workers, people at risk of social exclusion, entrepreneurs, etc.
Who? Social Capital (SC)	Capacity of the civil society networked structures

Institutional Capital (IC)

IC1. Competence distribution for strategic decision making	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Institutional processes where a fractal distribution of competence allow local authorities to decide on sustainable development, employment, training, social and health policies ▪ Methods and procedures that favour close interaction between public authorities and actors from private and social sectors including various representatives of economic, socio-cultural and environmental interests 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Competence attributed to Municipalities in sustainable development policy	Multiple-choice: Full / Partial / Not at all
Competence attributed to Municipalities in employment and training policy	Multiple-choice: Full / Partial / Not at all
Competence attributed to Municipalities in social inclusion policy	Multiple-choice: Full / Partial / Not at all
Competence attributed to Municipalities in health policy	Multiple-choice: Full / Partial / Not at all
New Governance methods and procedures implemented in projects and plans	Number of projects and plans per year

IC2. Budget autonomy to support strategic decision making
<i>Descriptor</i>
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Freedom of choice assigned to local authorities in public budget ▪ Participation of local stakeholders in decisions concerning public budget allocation

<i>Key indicators</i>	<i>Unit of measurement</i>
Total of non-earmarked public financing transferred by the State and Region to Municipalities	Percentage of financial resources without binding allocation over total transfer from the State and Region per year
Institutional mechanisms to involve stakeholders in public budget decision making	Number of stakeholders' advisory bodies per year

IC3. Fair interactions	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Interactions aimed at guarantying the rights to be parts and citizen of the local system through appropriate structures and services 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Centres and committees for equal opportunities (e.g. women and men), civil rights, children rights etc.	Number per year
Participation of immigrant groups in local government decision-making (e.g. charters, resolutions and structures)	Number of Municipalities per year

IC4. Access to information, dialogue and debate	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Information and debate on sustainable development, employment, training, social and other associated policies to favour connective tissues between local actors, communities and institutions 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Interactive communication networks with the citizens, e.g. e-government	Number per year

Human Capital (HC)

HC1. Perception of a variety of development approaches
<i>Descriptor</i>
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Willingness and practices of the local stakeholders to open their views and ways of thinking, looking at new issues and conceptions on local development

<i>Key indicators</i>	<i>Unit of measurement</i>
Workshops and seminars focused on sustainable development, social inclusion, gender policies and age management	Number per year
Publications on sustainable development	Number per year
Interactive (Internet-based) communication networks on sustainable development, social inclusion, gender policies and age management	Number per year

HC2. Entrepreneurial creativity and innovation	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Reproductive capacity of the local context, based on common cultural roots, mobilisation of potential resources and research ▪ Fertilisation of the local economic fabric to embed the single business into the fluxes of internal and external production relationships ▪ Corporate Social Responsibility (CSR) 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Average business size in all economic sectors	Number of employed per local unit per year
Average business size in Agriculture	Number of employed per local unit per year
Average business size in Industry	Number of employed per local unit per year
Average business size in Services	Number of employed per local unit per year
Businesses with ISO 14001, EMAS II, Vision 2000 and SA 8000 certification	Number of businesses per year

HC3. Capacity to cope with complexity and to anticipate change	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Strategies at local level able to increase the capacity of the local stakeholders to anticipate changes and to cope with a large amount of problems finding solutions that can reduce uncertainty through the sustainable management of endogenous resources 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Plans for wastes' recovery	Number per year
Plans for renewable energy	Number per year
Plans for clean technologies	Number per year
Plans for bio-building	Number per year
Plans for organic farming	Number per year
Plans for sustainable water management	Number per year
Plans for sustainable tourism	Number per year
Plans for sustainable logistics	Number per year
Plans for responsible consumption	Number per year
Plans for green procurements	Number per year
Training courses on sustainable development	Number per year
Training courses on social inclusion and gender policies	Number per year

HC4. Employability	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Improvement in the capacity to participate actively into the labour market through personalised paths, self-employment and job creation supported by individual and collective empowerment 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Training courses on women empowerment	Number per year
Training courses on self-employment and enterprise creation	Number per year
Training courses and stages to foster employment	Number per year
Training courses on corporate environmental and social responsibility	Number per year
Projects specifically devoted to labour insertion of people at risk of social exclusion (e.g. women, immigrants, disabled, homeless).	Number per year

HC5. Reliance on one's own resources without compromising those of others	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Collaboration between the local actors to utilise endogenous and exogenous resources in a synergetic way 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Inter-department and cross-sector agencies	Number per year
Joint territorial marketing plans	Number per year
Conferences with other EU local communities	Number per year

HC6. Integration of social and technical skills for innovation processes	
<i>Descriptor</i>	
<p>The Sustainable Life Development (SLD) is facilitated by:</p> <ul style="list-style-type: none"> ▪ Improvement in the capacity to be socially active and to have professional and technical ability through the integration of “tacit” (embedded in the local context) and codified (formalised learning methods) knowledge 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Vocational training courses that integrate social and technical skills	Number per year

Social Capital (SC)

SC1. Local knowledge for diversification processes	
<i>Descriptor</i>	
The Sustainable Life Development (SLD) is facilitated by: <ul style="list-style-type: none"> ▪ Diversification processes in economy, socio-culture and the environment based on discovering and re-encoding local knowledge and territorial specific qualities 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Projects on local economic, environmental and socio-cultural diversification	Number per year
Research projects on local identities, crafts & arts, cultural heritage and other endogenous resources	Number per year

SC2. Multicultural cohesion to enhance local development	
<i>Descriptor</i>	
The Sustainable Life Development (SLD) is facilitated by: <ul style="list-style-type: none"> ▪ Open interrelationships between different knowledge and cultures, considering both the current and future components of the local context 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Programmes for emersion of black market activities	Number per year
Projects of multicultural integration and for labour - social insertion	Number per year
Self-employed immigrants (persons who work in their own business, farm or professional practice)	Number per year
Relationships between self-employed immigrants and local entrepreneurial fabric	Percentage of self-employed immigrants over total number of local companies per year

SC3. Social cohesion	
<i>Descriptor</i>	
The Sustainable Life Development (SLD) is facilitated by: <ul style="list-style-type: none"> ▪ Social inclusion plans that enhance networks of mutual help and trust, interpersonal relationships, sense of belonging, while involving local operators and communities 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Social inclusion local plans (housing, social transport, child care, immigrants, elderly, etc.)	Number per year

SC4. Mobilisation of all actors	
<i>Descriptor</i>	
The Sustainable Life Development (SLD) is facilitated by:	
<ul style="list-style-type: none"> ▪ Local development agents, facilitators and animators of multiple interactions between the stakeholders through a knowledge flow aimed at capacity building 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Local development and social inclusion agencies	Number per year

SC5. Shared value system	
<i>Descriptor</i>	
The Sustainable Life Development (SLD) is facilitated by:	
<ul style="list-style-type: none"> ▪ Shared knowledge and values between the stakeholders on the socio-cultural, environmental and economic interdependencies 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Relevant committees and forums to involve stakeholders in strategic impact assessments (socio-cultural, environmental and economic interdependencies) of territorial strategies	Number per year
Forums and other organisational mechanisms to involve workers in environmental / social assessments of corporate strategies	Number per year

SC6. Shared visions of development	
<i>Descriptor</i>	
The Sustainable Life Development (SLD) is facilitated by:	
<ul style="list-style-type: none"> ▪ Capacity of long term strategic thinking clearly expressed in territorial plans and projects agreed upon by the local stakeholders through participatory decision-making processes 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Territorial development pacts	Number per year
Local Agenda 21 processes	Number per year

SLD DYNAMICS: Descriptors and Indicators

The SLD approach answers the following question: **Which driving energies should be stimulated to allow Social Potential to produce changes in favour of SLD?**

The SLD Dynamics aspects are represented by the following 6 levers of transformation (**When**) that favour positive changes in the management and delivery of services.

D1. Problem understanding	
<i>Descriptor</i>	
Changes in favour of Sustainable Life Development (SLD) can be produced by: <ul style="list-style-type: none"> ▪ Intra and inter – organisational openness of the services in order to find locally adequate solutions through a better understanding of the age and gender issues with a specific focus on women workers 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Existence of good practices of permanent collaboration between stakeholders and services in research that integrate gender, employment, social inclusion and health policy fields	Number per year
Existence of joint committees and groups that involve employment, training, social and health services in gender and age management	Number per year

D2. Open collective learning	
<i>Descriptor</i>	
Changes in favour of Sustainable Life Development (SLD) can be produced by: <ul style="list-style-type: none"> ▪ Capacity to utilise new approaches, methods and tools in order to better provide services capable of investing in institutional, human and social capitals 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Existence of good practices of employment, training, social and health services involved in local initiatives for sustainable development	Number per year

D3. Negotiation and co-decision	
<i>Descriptor</i>	
Changes in favour of Sustainable Life Development (SLD) can be produced by: <ul style="list-style-type: none"> ▪ Capacity to involve all relevant stakeholders in negotiation procedures to reach shared decisions on the integration of employment, gender, age, social inclusion and health policies within a comprehensive strategy for local development 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Existence of good practices of permanent collaboration between stakeholders and services to integrate gender, employment, social inclusion and health policy fields	Number per year

D4. Creation of a shared vision	
<i>Descriptor</i>	
Changes in favour of Sustainable Life Development (SLD) can be produced by: <ul style="list-style-type: none"> ▪ Clear organisational visions and missions to motivate the services' staff while being easy understandable by the clients (ageing women workers) and the other stakeholders. 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Existence of clear statements on vision and missions of services and integrated projects and plans	Number per year

D5. Client orientation	
<i>Descriptor</i>	
Changes in favour of Sustainable Life Development (SLD) can be produced by: <ul style="list-style-type: none"> ▪ Centrality of women workers and women at risk of social exclusion as “client & resource” of the services 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Existence of client-orientated codes and charters of services involved in social inclusion, employment and gender policies	Number per year
Existence of Quality Circles or Councils with the involvement of clients or their representatives	Number per year

D6. Result orientation	
<i>Descriptor</i>	
Changes in favour of Sustainable Life Development (SLD) can be produced by: <ul style="list-style-type: none"> ▪ Accountability, transparency and effectiveness of the services according to the expected results of plans, projects and local initiatives 	
<i>Key indicators</i>	<i>Unit of measurement</i>
Existence of good monitoring and evaluation systems on the expected results of policies, plans and service delivery	Number per year

Action Plan structure

The hypotheses of innovative actions derived from the Local Context Analysis are the raw materials necessary to elaborate a consolidated Action Plan that concerns a local case study area.

The procedures to elaborate an Action Plan are facilitated by the on-line (Internet-based) SLD system (see Chapter 10) through specific forms to be filled in by the project team (researchers) to:

- determine feasible paths (Step1)
- improve and prioritise the final hypotheses (Step 2)
- finalise the Action Plan with organisational and financial measures (Step 3)

Step 1: determining feasible paths

Each project team, supported by the associated Local Advisory Group (LAG), examines the relationships between the hypotheses of innovative actions in order to identify appropriate combinations answering the following key question:

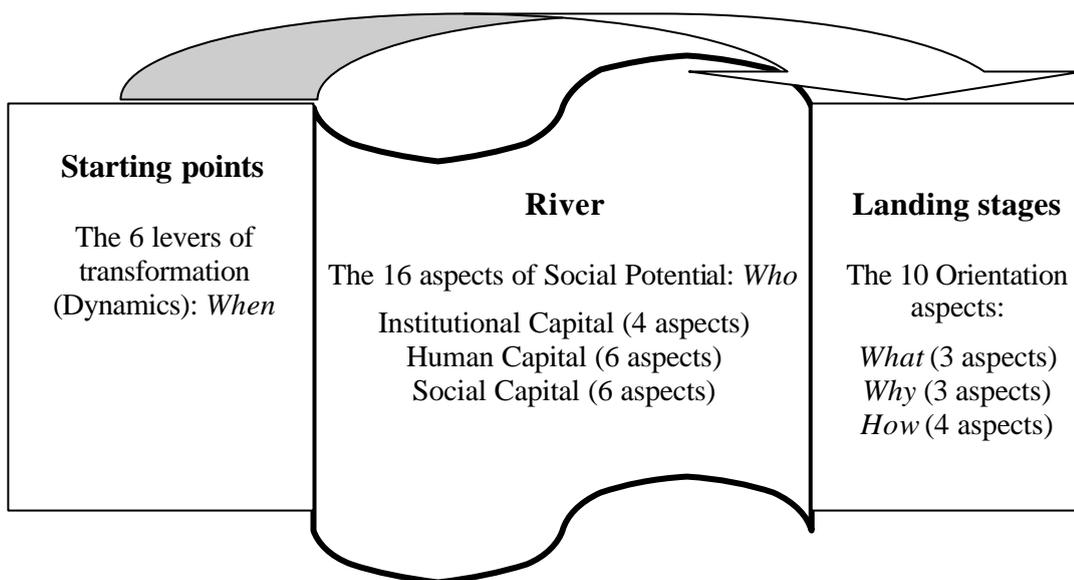
- what transformation levers (Dynamics) can be utilised to better act on the local key factors (Social Potential) in order to promote feasible paths towards a sustainable life development (Orientation)?

It is like to cross a river in a series of different points by means of appropriate boats.

The starting points are on the left side of the river and consist of the six transformation levers that supply the boats with the energy (e.g. fuel and equipment) necessary to cross the river.

The landing stages are on the right side of the river and consist of the ten aspects that orient the river crossing through suitable paths.

The boats make it possible to cross the river while facing the difficulties and the challenges of each path. The boats should be utilised according to their specific capacity. The boats are constituted by the sixteen aspects of the social potential.

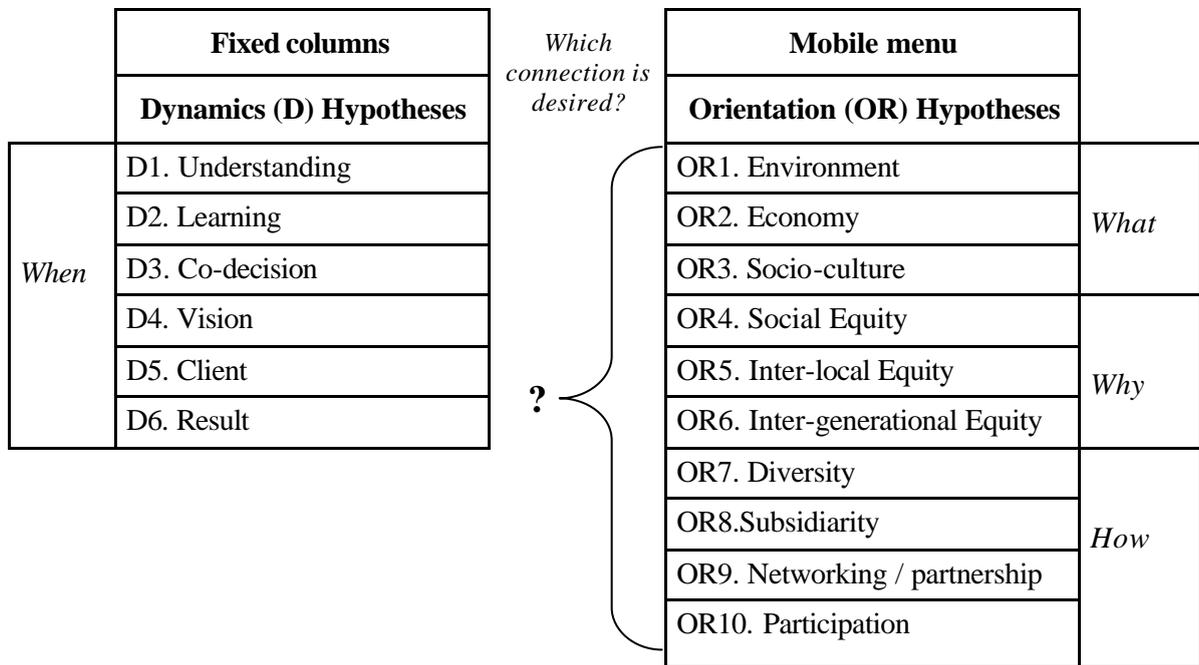


Therefore, two stages are necessary to answer the above-mentioned question:

- the connection stage where the trajectories towards SLD are identified looking at the best association between the innovative actions of each Dynamics lever and those regarding one or more Orientation aspects
- the placement stage where the innovative actions that stimulate and improve one or more aspects of the Social Potential are positioned along these trajectories

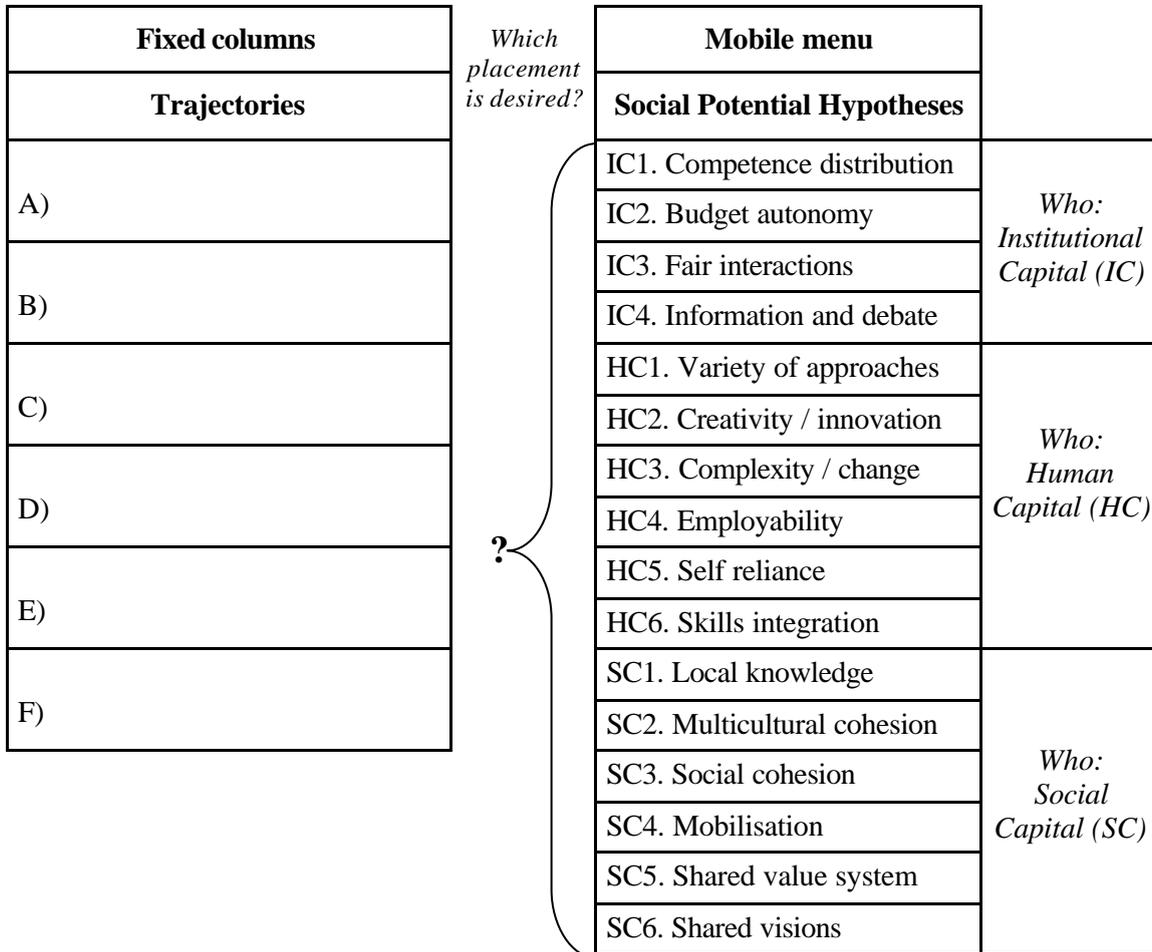
A specific form allows the project team to combine the hypotheses.

The form starts with the connection stage, asking for which hypotheses of Orientation have to be associated with one of the hypotheses of the Dynamics. To answer the question the six hypotheses concerning Dynamics are reported in fixed columns, while the ten hypotheses concerning Orientation appear in a mobile menu from which the most suitable ingredients can be selected.



Intermediate Hypotheses	Trajectories
	D1 + one or more OR
	D2 + one or more OR
	D3 + one or more OR
	D4 + one or more OR
	D5 + one or more OR
	D6 + one or more OR

Once decided the connections, the form focuses the attention of the project team on the placement stage. The form asks for which hypotheses of Social Potential have to be positioned along each of the above-resulting trajectories. To answer the question the six trajectories between Dynamics and Orientation are reported in fixed columns, while the four hypotheses concerning Institutional Capital and the six hypotheses concerning respectively Human and Social Capital appear in a mobile menu from which the most suitable ingredients can be selected.



Final Hypotheses	Trajectories
	A + one or more Social Potential
	B + one or more Social Potential
	C + one or more Social Potential
	D + one or more Social Potential
	E + one or more Social Potential
	F + one or more Social Potential

Step 2: improving and prioritising the final hypotheses

Six main trajectories emerge from the above combination stages and the following form allows each project team to further work out the contents of the related hypotheses in terms of:

Short description = Purpose
Expected results
Financial and organisational measures

The several contents of each hypothesis can be in fact better constructed:

- some of them play an overarching role more than others in term of purposes and aims; therefore contribute to the short description
- some of them describe expectations and probable results; therefore they can be utilised to identify the expected results
- some of them consider more practical issues than others looking for money, structures, systems and specific arrangements or procedures; therefore they can be utilised to focus the attention on concrete measures both of a financial and organisational nature

It is up to the project team to work out the six aggregated hypotheses in order to present them in a complete manner according to the above-mentioned structure.

Having defined the six aggregated strategies, their order of priority is determined by the project team and the associated Local Advisory Group.

Priorities are necessary to suggest feasible actions in a three years perspective. This is the first period of time during which the Action Plan will be implemented after the end of a SLD project through:

- co-ordination between supporting bodies, local development agencies, departments and services of the local public administrations
- mobilisation of local stakeholders and their networks

Priority can be given debating the correlation among the six hypotheses in order to arrive at a shared decision among researchers and stakeholders. A more efficient and easier method is the “score-budget”. A budget of six points is given to each participant in the decision. She / he can distribute the points according to her / his opinion, also in the extreme cases of attributing all six points to a main hypothesis, or of assigning equally one score to each hypothesis. The total scores reported by each hypothesis determine the priority scale.

Step 3: finalising the Action Plan

The financial and organisational measures are transferred in a specific form where the project team, in consultation with the Local Advisory Group, writes for each strand of intervention:

- the time duration
- the necessary budget
- the source of financing, e.g. the Regional Operational Programmes and the Single Programming Documents related to the European Structural Funds; funds from Chambers of Commerce, private financial institutes, stakeholders' associations and networks
- the department or agency responsible for managing the envisaged measures

This form can be filled in only if information exist on decisions taken by policy makers, considering that the Action Plan is elaborated by stakeholders and researchers to:

- favour further decisions
- improve local strategies and policies without substituting for the normal institutional decision making processes according to the democracy rules existing in the concerned local context
- be presented to the local decision makers as a product to be further negotiated in order to arrive at agreements on each (or some) of the suggested measure

The presentation of the Action Plan consists of three connected reports. Their draft versions are automatically produced by the on-line SLD system (see Chapter 10) and allow project team (researchers) to elaborate the final version with integrations on:

- Summary (4 paragraphs)
- Action Plan (6 Chapters, each for each Main Hypothesis – Trajectory)
- Local Context Analysis (32 Chapters, each for each SLD Aspect)

Summary

This Chapter explains how to elaborate a territorial Action Plan involving the local stakeholders through specific methods, procedures and instruments.

Methods, procedures and instruments	Purposes	Expected results
Local Context Analysis	To utilise in a strategic way SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) according to the 32 aspects of the SLD approach and through six main steps	Collection and combination of individual opinions and points of view to determine comprehensive hypotheses of innovative actions
Orientation descriptors and indicators	To guide the SLD / SWOT analysis with a clear orientation on What, Why and How to do in next years	Harmonisation of the contents of the Local Context Analysis in different case study areas while respecting and putting in value their diversities
Social Potential descriptors and indicators	To guide the SLD / SWOT analysis towards increasing capacity in Institutional, Human and Social Capitals, that is the Who of a Better Governance in next years	
Dynamics descriptors and indicators	To guide the SLD / SWOT analysis with driving energies that make it possible innovation in next years (When)	
Action Plan	To merge all assessments and decisions in 6 main consolidated trajectories through which the local social potential is stimulated to move towards Sustainable Life Development. This means to improve and prioritise final hypotheses of change through three main steps	Courses of action aimed at improving the capacity to anticipate and manage change in a three years perspective

The project team has to integrate research capacity with animation, facilitation and training abilities: an integration that is necessary also for the Pilot Initiatives illustrated in the next Chapter.

CHAPTER 8: PILOT INITIATIVES

Introduction

The Sustainable Life Development (SLD) approach aims at improving the capacity of local stakeholders to define innovative arrangements for age and gender management in entrepreneurial systems through fluid interrelationships and integration between work, family and social times.

Pilot Initiatives contain hypotheses of innovative actions at a business level. They concern work organisation, behaviours and human resources' strategies. These strategies are supported by and strengthen the measures envisaged in the Action Plans (Chapter 7) while connecting corporate, public and civil society responsibilities.

Pilot Initiatives derive from a Workplace Analysis carried out by the project team, in consultation with the stakeholders involved in the Local Project Group (Chapter 6), through the following phases:

- selection of a sample of local businesses and a sample of women workers
- elaboration of specific but comparable questionnaires to be administered to the two samples
- aggregation and final assessment of the questionnaires' results in terms of Strengths, Weaknesses, Opportunities and Threats (SLD / SWOT analysis) utilising the 10 Orientation aspects that answer the questions “What” and “Why” (Chapter 1) and “How” (Chapter 2) of the Sustainable Life Development (SLD) approach
- elaboration of hypotheses of innovative actions to frame the businesses Pilot Initiatives

A specific Descriptor is formulated for each of the 10 SLD Orientation aspect along with a series of Indicators to facilitate a more in depth Workplace Analysis, as well as to monitor the impacts of the innovative actions once they are put into operation.

The following paragraphs are dedicated to describe the:

- Samples and questionnaires
- Orientation descriptors, indicators and items of the related questionnaires
- Workplace Analysis
- Pilot Initiatives structure

Samples and questionnaires

Both the dimensions and components of the two samples (local businesses and ageing women workers) have to be formulated according to the specific characteristics of the concerned local case study area. These characteristics are elicited by the ongoing findings of the Local Context Analysis (LCA, Chapter 7) that allows researchers and stakeholders to perceive potentials and needs also at a business level according to meaning and direction of SLD (Sustainable Life Development) paths.

After nearly eight months of the Local Contest Analysis, each project team is able to identify, in collaboration with the Local Project Group, the two samples within a suggested ceiling of a maximum of 20 businesses and 100 ageing women workers.

Three are the questionnaires to be administered to the two samples:

- one concerning the company profile
- one dedicated to company benchmarking
- one exploring the life conditions of the ageing women workers

The three questionnaires are formulated according to the Descriptors of the 10 Orientation aspects that answer the questions “What, Why” and How” of the Sustainable Life Development (SLD) in a business context.

Even though each questionnaire has a different purpose, the fields and issues of enquiry are strictly correlated each others in order to:

- give final results that can be comprehensively assessed and compared
- formulate coherent hypotheses of innovative actions concerning the business Pilot Initiatives
- utilise these hypotheses to integrate and strengthen those envisaged in the territorial Action Plans

The first questionnaire (company profile) explores the corporate strategies concerning:

- work organisation
- organisational behaviour
- human resources management including age and gender issues

The second questionnaire (company benchmarking) concerns the corporate performances collecting:

- data from the Statement of Assets and Liabilities that give information on total investments, tangible fixed assets, intangible fixed assets and financial fixed assets; these data can be utilised only by 6 SLD aspects with the exclusion of Diversity and the three Equities (between individuals, between territories and between generations)
- data from the Profit and Loss Account that give information on turnover, purchases, production, commercial, administrative and leasing costs, amortizations and reserves and labour cost; these data can be utilised by all the 10 SLD aspects.
- estimates of the environmental and socio-cultural properties of the turnover as percentages of the total value created
- specific information on goods and services acquired from firms with a social and environmental quality profile, as well as on goods and services acquired from locally-based firms

The third questionnaire is dedicated to ageing women workers and investigates the main characteristics of their:

- conditions within the work organisation and the workplaces, including health, gender, discrimination and role issues, as well as involvement and participation in the decision making processes
- employment status and career paths, including learning and training processes
- working and life times, including household conditions

Indicators and items of the three questionnaires are connected by the Descriptors of the 10 SLD Orientation aspects, for example:

OR 1. Environment (What) Descriptor
Company profile Key indicators / Unit of measurement
Company benchmarking Voice (item) of the Profit & Loss Account in EURO Voice (item) of the Statement of Economic Assets & Liabilities in EURO
Ageing women workers Items for multiple-choice or closed-ended questions

A detailed presentation of the questionnaires is provided in the following section.

SLD ORIENTATION: Descriptors, Indicators and questionnaires' Items

The SLD approach answers the following question: **Which direction should be given to corporate systems?**

What do we want to sustain?	The integration between three Development Dimensions : <ul style="list-style-type: none"> • The environment • Economy • Socio-culture
Why do we want to sustain it?	To integrate three Equity Dimensions <ul style="list-style-type: none"> • Equity between individuals • Equity between territories • Equity between generations
How do we want to sustain it?	Through the integration of four Systemic Principles : <ul style="list-style-type: none"> • Diversity • Subsidiarity • Networking / Partnership • Participation

The following descriptors underline the main issues to be considered in the Workplace Analysis together with indicators and items of the related questionnaires.

The selection of indicators and items was made taking into account a wide literature, namely:

- the Sustainable Development Indicators (SDI) elaborated by the European Commission (CEC, 2005e)
- the environmental performance indicators concerning a Community eco-management and audit scheme – EMAS (CEC, 2003a)
- the questionnaires on working conditions, age management and gender issues currently and generally used by the European Foundation for the Improvement of Living and Working Conditions (EF, 1997a, 2000, 2001, 2003b, 2003c, 2005)

OR1. Environment (What)
<i>Descriptor</i>
Sustainable Life Development (SLD) orients corporate strategies towards: <ul style="list-style-type: none"> ▪ Reduction of natural resource consumption, Re-utilisation of products, Recycling of products, spare parts, semi-products and wastes (“3 R” principle to protect the ecosystems) ▪ Dissemination of clean technologies, products and processes ▪ Pollution prevention and reduction ▪ Utilisation of renewable sources of energy ▪ Healthy and safety workplaces ▪ Abatement of physical barriers and risks in order to prevent wear and tear of the human capacity ▪ Ergonomic job design and improvement to compensate physical decline

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Total waste	Tonnes per year	
Waste per unit of turnover	Index (Tonnes / Turnover Euro) per year	
Hazardous waste	Percentage of hazardous waste over total waste per year	
Total packaging material	Tonnes per year	
Total energy consumption	Megajoules (MJ) per year	
Total energy consumption per unit of turnover	Index (MJ / Turnover Euro) per year	
Utilisation of renewable energy sources (hydro plants, wind, solar, geothermal and biomass/wastes)	Ratio between the energy derived from renewable sources and the total energy consumption per year	
Total emissions of greenhouse gases and CO2 production	Tonnes per year on aggregated CO2 equivalents	
Total CO2 production per unit of turnover	Index (Tonnes / Turnover Euro) per year	
Water consumption	Tonnes per year	
Water consumption per unit of turnover	Index (Tonnes / Turnover Euro) per year	
Soil contaminated by heavy metals, pesticides, nutrients, etc.	M2 (square meters) of contaminated soil per year	
Water quality at workplace	Maximum concentration of harmful substance in milligram per litre	
Health risks and stress at workplace (I)	Maximum level of noise in decibels at location	
Health risks and stress at workplace (II)	Percentage of unhealthy workplace - units over total workplace-units	
Ergonomic design and abatement of physical barriers	Percentage of workplace - units audited and / or improved per year	

Company benchmarking (SLD Indices)
<i>Voice (item) of the Profit & Loss Account in EURO</i>
Turnover: <ul style="list-style-type: none"> ▪ Estimate (in percentage) of the ecological property attributable to the value of the sales
Production costs: <ul style="list-style-type: none"> ▪ Purchases of raw materials, subsidiary materials and goods that are recyclable, recycled, substitutive of dangerous materials ▪ Goods and services acquired from environmentally responsible firms (e.g. ISO 14001, EMASII) ▪ Production expenses related to the utilisation of renewable and recycled resources (energy, water, etc.) ▪ Commercial expenses and charges concerning logistics and transport systems with environment saving ▪ Commercial expenses and charges concerning re-usable and recycled packaging ▪ Leasing expenses for systems of environmental protection

Company benchmarking (SLD Indices)	
<i>Voice (item) of the Statement of Economic Assets & Liabilities in EURO</i>	
Tangible fixed assets:	
<ul style="list-style-type: none"> ▪ Systems for energy saving and efficiency ▪ Systems for water saving, efficiency and recycle ▪ Systems for minimising greenhouse emissions ▪ Systems for recovering and recycling of refusals, discards, used products ▪ Systems for lowering ground pollution ▪ Bio-buildings ▪ Machineries with low environmental impact (energy, noise, pollution, etc.) ▪ Equipments with low environmental impact (energy, noise, pollution, etc.) ▪ Vehicles and means of transport with low environmental impact (energy, noise, pollution, etc.) ▪ Systems to reduce packaging 	
Intangible fixed assets:	
<ul style="list-style-type: none"> ▪ Environmental Quality certifications and marks 	

Ageing women workers	
<i>Ecosystems protection, clean technologies and processes</i>	
You are working with	If YES please cross the box
<ul style="list-style-type: none"> ▪ Procedures and methods geared towards reducing, re-utilising or recycling of raw materials, products, spare parts, semi-products and wastes 	
<ul style="list-style-type: none"> ▪ Procedures and methods geared to prevent and reduce pollution 	
<ul style="list-style-type: none"> ▪ Clean technologies and processes 	
<ul style="list-style-type: none"> ▪ Renewable sources of energy 	
<i>Health risks and stress at workplace</i>	
You are exposed at work to	If YES please cross the box
<ul style="list-style-type: none"> ▪ Vibration from hand tools, machinery, etc. 	
<ul style="list-style-type: none"> ▪ Loud noise (you need to raise your voice to talk to people) 	
<ul style="list-style-type: none"> ▪ High temperatures 	
<ul style="list-style-type: none"> ▪ Low temperatures 	
<ul style="list-style-type: none"> ▪ Breathing in vapours, fumes, dust and other dangerous substances 	
<ul style="list-style-type: none"> ▪ Handling or touching dangerous materials, products, substances 	
<ul style="list-style-type: none"> ▪ Radiation (e.g. X rays, radioactive radiation, welding light, laser beams) 	
<ul style="list-style-type: none"> ▪ Tiring or painful positions almost all of the time 	
<ul style="list-style-type: none"> ▪ Carrying or moving heavy loads almost all of the time 	
<ul style="list-style-type: none"> ▪ Standing or walking almost all of the time 	
<ul style="list-style-type: none"> ▪ Wearing personal protective clothing or equipment almost all of the time 	
<i>Ergonomic design and abatement of physical barriers</i>	
Your workplace is	If YES please cross the box
<ul style="list-style-type: none"> ▪ Periodically audited 	
<ul style="list-style-type: none"> ▪ Improved if necessary 	

Ageing women workers			
<i>Environmental quality</i>			
In the environment where you live (that is the immediate neighbourhood of your home) there are problems concerning:	Please cross only one box		
	Many	Few	Not at all
▪ Noise			
▪ Air pollution			
▪ Lack of access to recreational or green areas			
▪ Low water quality			

OR2. Economy (What)
<i>Descriptor</i>
<p>Sustainable Life Development (SLD) orients corporate strategies towards:</p> <ul style="list-style-type: none"> ▪ Investments in eco-efficiency production processes ▪ Corporate Social Responsibility (equal opportunities between men and women included) ▪ Quality employment in activities related to developing environmentally sound products and processes ▪ Utilisation of information and Communication Technology (ICT) also to facilitate teleworking

Company profile			
Company's main sector of activity	Please cross only one box		
	Agriculture	Industry	Services
<i>Indicators</i>	<i>Unit of measurement</i>		Please insert available Data
Total number of employees	Number per year		
Employees with permanent contracts	Percentage over total number of employees per year		
Employees with fixed-term contracts	Percentage over total number of employees per year		
Employees with temporary agency contracts	Percentage over total number of employees per year		
Employees with seasonal work	Percentage over total number of employees per year		
Workers on demand (job-on-call)	Percentage over total number of employees per year		
Apprenticeship or other training scheme	Percentage over total number of employees per year		
Women employees (I)	Number per year		
Women employees (II)	Percentage over total number of employees per year		
Women employees with permanent contracts	Percentage over total number of employees per year		
Women employees with fixed-term contracts	Percentage over total number of employees per year		

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Women employees with temporary agency contracts	Percentage over total number of employees per year	
Women employees with seasonal work	Percentage over total number of employees per year	
Women workers on demand (job-on-call)	Percentage over total number of employees per year	
Women in apprenticeship or other training scheme	Percentage over total number of employees per year	
Men employees (I)	Number per year	
Men employees (II)	Percentage over total number of employees per year	
Men employees with permanent contracts	Percentage over total number of employees per year	
Men employees with fixed-term contracts	Percentage over total number of employees per year	
Men employees with temporary agency contracts	Percentage over total number of employees per year	
Men employees with seasonal work	Percentage over total number of employees per year	
Men workers on demand (job-on-call)	Percentage over total number of employees per year	
Men in apprenticeship or other training scheme	Percentage over total number of employees per year	
Employees in environmental friendly technologies, products and processes	Percentage over total number of employees per year	
<i>Indicators</i>		If YES please cross the box
Usage of Internet-based communication systems		
Teleworking from home with a PC		
Subcontracting, outsourcing and self-employed jobs		
Overtime (additional hours)		
Night and shift work		
Weekend work		
Compressed working week		
Irregular and unpredictable working times		
Part time		
Utilisation of unemployment benefits		
Utilisation of minimum income / wage schemes		

Company benchmarking (SLD Indices)	
<i>Voice (item) of the Profit & Loss Account in EURO</i>	
Turnover:	
<ul style="list-style-type: none"> ▪ Total revenues from products and performances 	
Total amortisation and reserves	
Total labour costs	
Production costs:	
<ul style="list-style-type: none"> ▪ Total purchases of raw materials, subsidiary materials, consumables and goods ▪ Total production expenses ▪ Total commercial expenses and charges ▪ Total administrative and overheads expenses ▪ Total leasing expenses 	
<i>Voice (item) of the Statement of Economic Assets & Liabilities in EURO</i>	
Total Investments	
Tangible fixed assets:	
<ul style="list-style-type: none"> ▪ Information and Communication Technologies 	
Intangible fixed assets:	
<ul style="list-style-type: none"> ▪ Economic and Organisational Quality certifications and marks 	
Total financial fixed assets	

Ageing women workers	
<i>Employment status</i>	
You are	If YES please cross the box
▪ Self-employed	
▪ Employed with permanent contracts	
▪ Employed with fixed-term contracts	
▪ Employed part-time	
▪ Employed with temporary agency contracts	
▪ Employed with seasonal work	
▪ Worker on demand (job-on-call)	
▪ In apprenticeship or other training scheme	
▪ Without a written contract	
▪ Teleworking from home with telecommunication technologies (e.g. PC, Internet)	
▪ Working at home, excluding telework	
▪ Working in places other than home or company premises (e.g. client's premises, on the road) almost all of the time	
▪ Working with computers, Internet and email for professional purposes	
▪ Employed in environmental friendly technologies, products and processes	
▪ In overtime (additional hours)	
▪ In night and shift work	
▪ In weekend work	
▪ In compressed working week	
▪ In irregular and unpredictable working times	
▪ In unemployment benefits	
▪ In minimum income / wage schemes	

Ageing women workers	
<i>Employment dimension</i>	
Including yourself, about how many people are employed at the place where you usually work	Please cross only one box
▪ Under 10	
▪ 11 to 49	
▪ 50-99	
▪ More than 100	
<i>Employment sector</i>	
In which of the following sectors of the economy does your company operate?	Please cross only one box
▪ Agriculture	
▪ Industry	
▪ Service	

OR3. Socio-culture (What)
<i>Descriptor</i>
<p>Sustainable Life Development (SLD) orients corporate strategies towards:</p> <ul style="list-style-type: none"> ▪ Investments in human capital, research and studies ▪ Reduction in intimidation and discrimination, sexual harassment against women ▪ Abatement of gender and age barriers and stereotypes at workplaces, in job descriptions and corporate advertisements ▪ Dissemination of knowledge and expertise on gender policies ▪ Increase in people literacy and education ▪ Training measures during parental leave and in relation to reintegration into employment ▪ Dissemination of knowledge and expertise on environmental issues and sustainable development

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
High school degree of the employees	Percentage over total number of employees per year	
University degree of the employees	Percentage over total number of employees per year	
Intimidation, discrimination and sexual harassment against women	Number of actions brought before the company management	
Corporate advertising on gender and age issues	Number per year	
Education and training on gender policies	Number per year	

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Life-long learning	Percentage of employees involved in education or training courses over total number of employees per year	
Training measures during parental leave and in relation to reintegration into employment	Number per year	
Education and training programmes on the environment and sustainable development	Number per year	

Company benchmarking (SLD Indices)	
<i>Voice (item) of the Profit & Loss Account in EURO</i>	
Turnover:	
<ul style="list-style-type: none"> ▪ Estimate (in percentage) of the socio-cultural property (responsible consumption, fair trade, etc.) attributable to the value of the sale 	
Production costs:	
<ul style="list-style-type: none"> ▪ Production expenses for research, tests, training, books, newspapers and magazines, socio-cultural initiatives, etc 	
<i>Voice (item) of the Statement of Economic Assets & Liabilities in EURO</i>	
Intangible fixed assets:	
<ul style="list-style-type: none"> ▪ Social Quality certifications and marks 	

Ageing women workers	
<i>Education and training</i>	
What is the highest level of education you completed?	Please cross only one box
<ul style="list-style-type: none"> ▪ Primary education 	
<ul style="list-style-type: none"> ▪ Secondary education 	
<ul style="list-style-type: none"> ▪ University 	
<ul style="list-style-type: none"> ▪ None 	
You have been involved in	If YES please cross the box
<ul style="list-style-type: none"> ▪ Literacy and education courses 	
<ul style="list-style-type: none"> ▪ Training measures during parental leave and in relation to reintegration into employment 	
<ul style="list-style-type: none"> ▪ Training and education courses on gender policies (equal opportunities between men and women) 	
<ul style="list-style-type: none"> ▪ Training on new technology 	
<ul style="list-style-type: none"> ▪ Training on environmental issues and sustainable development 	

Ageing women workers	
<i>Violence and discriminations</i>	
Personally, you have been subject at workplace to	If YES please cross the box
▪ Physical violence	
▪ Intimidation	
▪ Gender (sexual) discrimination	
▪ Unwanted sexual attention	
▪ Age discrimination	
▪ Discrimination linked to nationality, ethnic background / race	
▪ Discrimination linked to disability	
▪ Discrimination linked to sexual orientation	
▪ Discrimination linked to political and religious orientation	

OR4. Social equity / between individuals (Why)
<i>Descriptor</i>
<p>Sustainable Life Development (SLD) orients corporate strategies towards:</p> <ul style="list-style-type: none"> ▪ Involvement of employees and their unions in human resources' management ▪ Job satisfaction and motivation procedures ▪ Equal opportunities between men and women (employment, pay, access to education and other services) ▪ Increase in the access by women to higher posts and in the proportion of women in decision making processes ▪ Collaboration with social services to ensure child care and day-care facilities, during women work and training, as well as to help the most vulnerable persons (children, elderly, those with different abilities, immigrants, those with particular forms of dependency) ▪ Reconciliation between working and “non-working” life supported by a more suitable organisation of “working time” with “social time” (school, services, stores and shops, leisure activities, etc.) ▪ Safety measures both at work and in physical mobility

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Average gender pay gap in similar jobs	Average difference in percentage between men and women wage in similar job per year	
Parental leaves	Percentage of employees in parental leave over total number of employees per year	
Women employees with high school degree	Percentage over total women employees per year	
Men employees with high school degree	Percentage over total men employees per year	

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Women employees with university degree	Percentage over total women employees per year	
Men employees with university degree	Percentage over total men employees per year	
Women in higher posts	Percentage over total persons in higher posts per year	
Accident at work	Number of employee accidents per year	
Serious accident at work (with more than 3 days' absence)	Percentage of persons affected by serious at-work-accidents over the number of employed persons per year	
Morbidity	Number of sick days per employee and year	
<i>Indicators</i>		If YES please cross the box
Involvement of employees and their unions in human resources' management		
Job satisfaction and motivation procedures		
Collaboration with social services to alleviate family work load and to help the most vulnerable persons		
Projects and plans for a more suitable organisation of "working time" with "social time"		

Company benchmarking (SLD Indices)
<i>Voice (item) of the Profit & Loss Account in EURO</i>
Production costs: <ul style="list-style-type: none"> ▪ Goods and services acquired from firms socially responsible (e.g. SA8000) ▪ Production expenses for improving corporate social dialogue

Ageing women workers				
<i>Job satisfaction and motivation</i>	Please cross only one box			
On the whole, you are satisfied with working conditions at your workplace:	Very satisfied	Fairly satisfied	Not very satisfied	Not at all
Within your workplace:	If YES please cross the box			
▪ You receive the same wage of a man employed in a similar job				
▪ You can receive parental leave benefits				
<i>Working times</i>	Hours per week			
How many hours do you usually work per week at your workplace, including overtime?				
In average how many hours per week do you normally spend travelling from home to work and back?				

Ageing women workers					
In general your working hours fit in with	Please cross only one box				
	Very well	Fairly well	Not very well	Not at all	
▪ Your family commitments					
▪ Your social commitments					
<i>Other times of life</i>					
How many hours per week are you usually involved in any of the following activities?				Hours per week	
▪ Voluntary or charitable activity					
▪ Political / trade union activity					
▪ Caring for and educating your children (*)					
▪ Cooking (*)					
▪ Housework (*)					
▪ Caring for elderly/disabled relatives (*)					
▪ Taking a training or education course					
▪ Sporting activity					
▪ Cultural activity					
▪ Leisure activity					
(*) domestic tasks					
<i>Household conditions</i>				Number	
How many people live in your household, including yourself?					
How many children under 15 are currently living at home?					
How many people in your household have a paid job?					
How many elderly people are dependent upon you in your household?					
How many disabled persons are dependent upon you in your household?					
Have you or someone else in your household received any of the following types of income over the past 12 months?				If YES please cross the box	
▪ Earnings from work, included income from self-employment					
▪ Pension					
▪ Child benefit					
▪ Unemployment, disability or any other social benefits					
▪ Other income (e.g. from savings, property or stocks, etc.)					
You are the person who contributes most in the household income					
<i>Services' conditions</i>					
How would you rate the quality of each of the following public services in your territorial area?	Please cross only one box				
	Excellent	Good	Quite good	Insufficient	Not at all efficient
Health					
Education system					
Public transport					
Social services					
Pension system					

OR5. Inter-local equity / between territories (Why)
<i>Descriptor</i>
Sustainable Life Development (SLD) orients corporate strategies towards: <ul style="list-style-type: none"> ▪ Contributing to a balanced inter-local development through fair and solidarity relationships and alliances between entrepreneurs of different local communities

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Immigrant employees	Number per year	
Immigration	Percentage of immigrants over total number of employees per year	
Import of raw materials, subsidiary materials and goods from abroad	Percentage of purchases from abroad over total amount of purchases per year	
Export of raw materials, subsidiary materials and goods to a foreign country	Percentage of the value of exportation over total amount of turnover per year	
<i>Indicators</i>		If YES please cross the box
Transfer of company branches and processes to a foreign country		
Projects on fair trade		

Company benchmarking (SLD Indices)
<i>Voice (item) of the Profit & Loss Account in EURO</i>
Production costs: <ul style="list-style-type: none"> ▪ Commercial expenses and charges for fair trade

Ageing women workers	
<i>Solidarity processes</i>	
You are involved in	If YES please cross the box
<ul style="list-style-type: none"> ▪ Initiatives for multicultural and multiethnic integration within your workplace 	
<ul style="list-style-type: none"> ▪ Initiatives for multicultural and multiethnic integration outside your workplace 	
<ul style="list-style-type: none"> ▪ Fair trade initiatives within your workplace 	
<ul style="list-style-type: none"> ▪ Fair trade initiatives outside your workplace 	

OR6. Inter-temporal equity / between generations (Why)
<i>Descriptor</i>
<p>Sustainable Life Development (SLD) orients corporate strategies towards:</p> <ul style="list-style-type: none"> ▪ Equal opportunities between generations without gender discrimination (e.g. age and gender management to enable women to enter, remain in or return to employment) • Training and education activities geared to the specific needs and preferred methods of older workers, preferably developed in conjunction with them and through their active involvement ▪ Training of older women workers in new technology, as well as in environmental recovery and improvement ▪ Utilisation of ageing workers into vocational training as trainers and mentors to young people, as well as advisors, facilitators and consultants in specific tasks and projects ▪ Investments in research, studies and strategic impact assessment on projects (long-term risks and damaging changes) looking at the future generations and considering conservation and development of environmental resources

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Employees below 25 years (I)	Number per year	
Employees below 25 years (II)	Percentage over total number of employees per year	
Employees above 55 years (I)	Number per year	
Employees above 55 years (II)	Percentage over total number of employees per year	
Average employee dependency ratio	Percentage of ageing employees (aged 55 and over) over employees aged below 25 per year	
Women employees below 25 years (I)	Number per year	
Women employees below 25 years (II)	Percentage over total number of women employees per year	
Women employees above 55 years (I)	Number per year	
Women employees above 55 years (II)	Percentage over total number of women employees per year	
Men employees below 25 years (I)	Number per year	
Men employees below 25 years (II)	Percentage over total number of men employees per year	
Men employees above 55 years (I)	Number per year	
Men employees above 55 years (II)	Percentage over total number of men employees per year	
Employees in early retirements	Percentage over total number of employees per year	
Training and education activities for older workers	Number per year	

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Training of older women workers in new technology, as well as in environmental recovery and improvement	Number of initiatives per year	
Utilisation of ageing workers into vocational training, as trainers and mentors to young people, advisors, facilitators and consultants in specific tasks and projects	Number of initiatives per year	
Participation in projects submitted to strategic environmental impact assessment	Number of assessments carried out per year	
<i>Indicators</i>		If YES please cross the box
Childcare facilities and assistance (e.g. in-firm nursery or crèches)		

Company benchmarking (SLD Indices)
<i>Voice (item) of the Profit & Loss Account in EURO</i>
Production costs: <ul style="list-style-type: none"> ▪ Production expenses for studies concerning appraisal and assessment of environmental, economic and socio-cultural impacts

Ageing women workers									
<i>Career paths</i>					Number				
How old are you?									
How many years have you been in this job?									
How many years have you been employed in this company?									
How many times have you changed job and / or company in your professional career?									
You are in early retirement					If YES please cross the box				
<i>Job expectations</i>					If YES please cross the box				
You think you will be able to do the same job you are doing now when you are 60 years old									
If you could change job, which of the following occupations might meet better your expectations?					Please cross only one box				
▪ To be always employed in the current company but with a higher position									
▪ To be always in the current position but in another company									
▪ To be employed with a higher position in another company									
▪ To be a subcontracting self-employed of the current company									
▪ To be totally self-employed									
Do you think it is that you might lose your job in the next 6 months?					Please cross only one box				
					Very likely	Quite likely	Quite unlikely	Very unlikely	Don't know

Ageing women workers	
<i>Putting in value resources of ageing workers</i>	
You are involved in	If YES please cross the box
▪ Organising and/or attending training and education activities geared to specific needs of ageing workers	
▪ Training of ageing workers on new technology	
▪ Training of ageing workers on environmental issues	
▪ Vocational training as a trainer and mentor to young people	
▪ Specific tasks and projects as a senior advisor, facilitator and consultant	
<i>Increasing awareness on future generations</i>	
You are involved in	If YES please cross the box
▪ Studies, research concerning and/or projects submitted to strategic environmental impact assessment	

OR7. Diversity (How)
<i>Descriptor</i>
Sustainable Life Development (SLD) orients corporate strategies towards:
▪ Innovation and diversification propelled by merging economic, socio-cultural and environmental identities
▪ Involvement of employees in the utilisation of their different cultures, knowledge and professional expertise

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Participation in projects on innovation and diversification	Number of projects per year	
Participation in projects on Biodiversity	Number of projects per year	
Immigrant employees from European Union (EU 27)	Percentage over total immigrant employees per year	
Immigrant employees from Europe non EU 27	Percentage over total immigrant employees per year	
Immigrant employees from Africa	Percentage over total immigrant employees per year	
Immigrant employees from America	Percentage over total immigrant employees per year	
Immigrant employees from Asia	Percentage over total immigrant employees per year	
Immigrant employees from Oceania	Percentage over total immigrant employees per year	
Women immigrant employees	Percentage of women immigrants over total number of immigrant employees per year	

Company profile	
<i>Indicators</i>	If YES please cross the box
Local origin certification	

Company benchmarking (SLD Indices)
<i>Voice (item) of the Profit & Loss Account in EURO</i>
Production costs: <ul style="list-style-type: none"> ▪ Production expenses for studies concerning economic, environmental, socio-cultural diversification and innovation

Ageing women workers	
<i>Mutual learning from different cultural backgrounds</i>	
Within your workplace	If YES please cross the box
<ul style="list-style-type: none"> ▪ You are working with colleagues coming from other countries 	
<ul style="list-style-type: none"> ▪ You exchange points of view and experience with them 	
<ul style="list-style-type: none"> ▪ You are learning new things from these exchanges 	
<i>Innovation and diversification</i>	
Within your workplace, you are involved in	If YES please cross the box
<ul style="list-style-type: none"> ▪ Projects and initiatives for innovation and diversification of products and processes 	
<ul style="list-style-type: none"> ▪ Projects on Biodiversity 	

OR8. Subsidiarity (How)
<i>Descriptor</i>
Sustainable Life Development (SLD) orients corporate strategies towards: <ul style="list-style-type: none"> ▪ Integration of top-down and bottom-up approaches in streamlined decision making processes through devolution of tasks, autonomy and responsibilities over planning, budget, innovation and technology to employees, team and project groups ▪ Job enrichment, job and task rotation, (semi) autonomous work, multitasking and multi-skilled activities ▪ Improvement and creation of local networks of responsible (e.g. green) procurement, production, distribution and consumption while supporting entrepreneurial synergy and reducing spatial range of material flows (territorial subsidiarity)

Company profile			
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data	
Devolution of tasks, autonomy and responsibilities to employees, team and project groups	Percentage of employees involved in devolution processes over total number of employees per year		
Participation in local networks for responsible (e.g. green and social) procurement, production, distribution and consumption	Number per year		
Job enrichment, job and task rotation, (semi) autonomous work, multitasking and multi-skilled activities	Please cross only one box		
	Full	Partial	Not at all

Company benchmarking (SLD Indices)	
<i>Voice (item) of the Profit & Loss Account in EURO</i>	
Production costs: <ul style="list-style-type: none"> ▪ Production expenses for improving work organisation through devolution of responsibilities, tasks and autonomy (job rotation, teamwork, etc.) ▪ Goods and services acquired from local firms 	
<i>Voice (item) of the Statement of Economic Assets & Liabilities in EURO</i>	
Financial fixed assets: <ul style="list-style-type: none"> ▪ Participations in local production and consumption networks (e.g. purchase groups) ▪ Participations in organisations (networks) for responsible consumption 	

Ageing women workers	
<i>Work organisation subsidiarity</i>	
Within your workplace	If YES please cross the box
▪ You are working under the direct control of your boss	
▪ You are working in close collaboration with your colleagues (e.g. team and project groups)	
▪ You have, or share with your colleagues, autonomy and responsibilities (e.g. over planning, budget, innovation and technology)	
▪ You are assessing yourself the quality of your own work	
▪ You are solving unforeseen problems on your own	
▪ You are involved in complex tasks (e.g. job enrichment, job rotation, multitasking and multi-skilling activities)	
▪ You are learning new things	
<i>Territorial subsidiarity</i>	
You are involved in initiatives promoted by	If YES please cross the box
▪ Associations and networks for responsible (e.g. green and social) procurement and consumption	

OR9. Networking and partnership (How)
<i>Descriptor</i>
<p>Sustainable Life Development (SLD) corporate strategies towards:</p> <ul style="list-style-type: none"> ▪ Alliances, relationships and exchange of good practices with other companies, their associations and those of environmental, socio-cultural and ethical interests ▪ Networked organisations (e.g. consortia between businesses) ▪ Collaboration with agencies and services involved in employment, training, education, social inclusion and sustainable development ▪ Association freedom of the employees and other stakeholders

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Participation in business and trade associations	Number per year	
Exchange of good practices in sustainable development, employment, training, education and social inclusion policies and services	Number of projects per year	
Participation in consortia between companies	Number per year	
Relationships with associations dealing with environmental and social (e.g. women, immigrants, families, disabled persons, elderly, equal opportunities, civil rights) issues	Number per year	
Collaboration with agencies in projects concerning sustainable development, employment, training, education and social inclusion policies	Number of projects per year	
Presence of trade unions in the company	Number per year	

Company benchmarking (SLD Indices)
<i>Voice (item) of the Profit & Loss Account in EURO</i>
<p>Production costs:</p> <ul style="list-style-type: none"> ▪ Administrative and overhead expenses concerning subsidies for associations of economic, socio-cultural, environmental interests <p>Amortizations and reserves:</p> <ul style="list-style-type: none"> ▪ Amortizations of investments in financial assets related to participations in firms, association, funds, networks
<i>Voice (item) of the Statement of Economic Assets & Liabilities in EURO</i>
<p>Financial fixed assets:</p> <ul style="list-style-type: none"> ▪ Participations in firms and associations of an economic nature ▪ Participations - donations in firms and associations involved in environmental and socio cultural issues ▪ Participations in ethical and green funds

Ageing women workers	
<i>Networking and partnership</i>	
You are a member of and / or you participate in initiatives of	If YES please cross the box
▪ Trade unions	
▪ Environmental associations	
▪ Associations of social interest (e.g. women, immigrants, families, disabled persons, elderly, equal opportunities, civil rights)	
▪ Cultural associations	

OR10. Participation (How)
<i>Descriptor</i>
Sustainable Life Development (SLD) orients corporate strategies towards:
<ul style="list-style-type: none"> ▪ Increase in awareness on policies for age and gender management, labour and social inclusion, corporate social responsibility and sustainable development ▪ Improvement of the relationships between the company and the stakeholders through information, animation and facilitation

Company profile		
<i>Indicators</i>	<i>Unit of measurement</i>	Please insert available Data
Promotion and / or participation in awareness campaigns related to social inclusion, gender issues, civil and work rights	Number per year	
Promotion and / or participation in awareness campaigns related to sustainable development and corporate social responsibility	Number per year	
Participation of women in all below-mentioned organisational mechanisms (forums, committees, groups, etc.)	Percentage (estimate) of women over all members	
<i>Indicators</i>		If YES please cross the box
Regularity of information on corporate social strategy given to employees, workers' representatives and trade unions		
Regularity of information on corporate environmental strategy given to employees, workers' representatives and trade unions		
Meetings between management, workers' representatives and trade unions		
Forums, committees and other organisational mechanisms (e.g. Quality Circles or Councils) with the involvement of employees and other stakeholders		
Equal opportunities committees, teams, working groups or project-based groups		
Environmental committees, teams, working groups or project-based groups		

Company benchmarking (SLD Indices)	
<i>Voice (item) of the Profit & Loss Account in EURO</i>	
Production costs:	
<ul style="list-style-type: none"> ▪ Commercial expenses and charges for operating environmental, social and economic marketing 	
Amortizations and reserves:	
<ul style="list-style-type: none"> ▪ Amortizations of investments in intangible fixed assets related to quality improvement and business promotion 	
<i>Voice (item) of the Statement of Economic Assets & Liabilities in EURO</i>	
Intangible fixed assets:	
<ul style="list-style-type: none"> ▪ Strategic environmental, social and economic marketing 	

Ageing women workers	
<i>Promotion and / or participation in awareness campaigns</i>	
You are regularly informed by the company on	If YES please cross the box
<ul style="list-style-type: none"> ▪ Health and safety risks related to your workplace 	
<ul style="list-style-type: none"> ▪ Environmental friendly technologies, products and processes 	
<ul style="list-style-type: none"> ▪ Responsible consumption and utilisation of available resources (e.g. natural resources) 	
<i>Debating the corporate strategy</i>	
You are involved by the company in debating	If YES please cross the box
<ul style="list-style-type: none"> ▪ Its overall strategies and performances (including labour rights and collective bargaining agreements) 	
<ul style="list-style-type: none"> ▪ Its strategy for age and gender management (e.g. equal opportunities between men and women) 	
<ul style="list-style-type: none"> ▪ Overall social impacts of its strategies and performances 	
<ul style="list-style-type: none"> ▪ Overall environmental impacts of its strategies and performances 	
<i>Participation bodies</i>	
At your workplace, you are a component of	If YES please cross the box
<ul style="list-style-type: none"> ▪ Equal Opportunities committees teams, working groups or project-based groups 	
<ul style="list-style-type: none"> ▪ Quality Circles or Councils 	
<ul style="list-style-type: none"> ▪ Environmental committees, teams, working groups or project-based groups 	

Workplace Analysis

Questionnaires are individually administered to the components of the two samples. Researchers (project team) are responsible for carrying out this field work. Stakeholders (Local Project Group) support the field work favouring contacts and relationships with the concerned companies and ageing women workers.

Each project team has a number of paper copies of the questionnaires corresponding to the number of companies and persons to be interviewed.

Each questionnaire is anonymous but codified in order to correctly input and aggregate the data.

Each project team inputs data resulting from the field work into forms provided by the on-line (Internet-based) SLD system (Chapter 10).

The on-line SLD system elaborates the data automatically while providing anonymous results.

Data of the questionnaires on company profile and ageing women workers are aggregated and calculated in terms of arithmetic mean, maximum and minimum values.

Data of the questionnaire on company benchmarking are treated individually.

Companies themselves can directly utilise the benchmarking tool to make autonomous, spontaneous and anonymous exercises at their best convenience in order to understand the orientation of their business strategy towards SLD, without leaving any data registered or kept on record.

Benchmarking results are given according to the following SLD indices.

PLEASE = Profit and Loss Economic Account with Social and Environmental dimensions			
Production Costs	SLD indices (% between 10 SLD Orientation aspects)	Turnover	SLD indices (% between 3 SLD Orientation aspects)
SLD Orientation aspects	utilised to rectify the value employed	SLD Orientation aspects	utilised to rectify the value created
O1. Environment		O1. Environment	
O2. Economy		O2. Economy	
O3. Socio-culture		O3. Socio-culture	
O4. Social equity		Total	100
O5. Inter-local equity			
O6. Inter-temporal equity			
O7. Diversity			
O8. Subsidiarity			
O9. Networking and partnership			
O10. Participation			
Total	100		

SEALES = Statement of Economic Assets and Liabilities with Environmental and Social dimensions	
Investments	% between 6 SLD Orientation aspects
	utilised to rectify the resources employed
O1. Environment	
O2. Economy	
O3. Socio-culture	
O8. Subsidiarity	
O9. Networking and partnership	
O10. Participation	
Total	100

The on-line SLD system (Chapter 10) gives results that summarise the profiles of the interviewed companies and women in each concerned local context.

These territorially-based profiles are utilised project team and the associated Local Project Group (LPG) to perform a SLD / SWOT analysis following steps that are very similar to those already presented in Chapter 7.

The procedures to perform the SLD / SWOT analysis are facilitated by the on-line (Internet-based) SLD system through specific forms to be filled in by:

- researchers and stakeholders to assess individually Strengths and Weaknesses, Opportunities and Threats for each of the 10 SLD Orientation aspects (Step 1)
- researchers and stakeholders to define individually hypotheses of innovative actions for each of the 10 SLD Orientation aspects (Steps 2 and 3)
- researchers and stakeholders to merge individually the hypotheses of innovative actions concerning each of the 10 SLD Orientation aspects (Step 4)
- researchers to aggregate all individually defined assessments and innovative actions (Step 5)

Step 1: assessing individually Strengths, Weaknesses, Opportunities and Threats for each of the 10 SLD Orientation aspects

Short forms with few rows allow the respondent to write concise sentences adopting the “key words” technique. The key words must express assessment on the specific issue taken into account by the respondent:

- a characteristic of workplace, work organisation and corporate strategy related to the company under examination
- a characteristic of work and life conditions of the interviewed women workers

The assessment of these issues must be made carefully reading the Descriptor of the SLD aspect that is reported at the opening of four forms concerning its Strengths, Weaknesses, Opportunities and Threats.

The forms appear subsequently and are filled in separately to avoid bias and decrease in creativity and intuition because of drag effects determined by looking at what was written before.

However there is possibility to improve what was written in a specific form reopening it at the respondent best convenience.

Generally each separate form takes about five minutes of time to be filled in.

This time is enough to avoid that wordy formulation exceeds in useless details against the opportunity given to complete all the rows with the assessment of other issues.

The assessments do not have obviously the same importance with respect to the issues taken into consideration. For instance not all the Strengths are strong at the same degree.

Therefore, a score must be attributed to each assessment phrase by the respondent according to a scale of importance from 1 (very low) to 5 (very high) points.

Example: Environment	
<i>Descriptor: The SLD approach addresses</i>	
<i>Strengths</i>	<i>Score</i>
Low packaging materials	2
Reutilisation of waste and spare parts	3
Healthy workplaces	5
Systems to minimise environmental damages	4

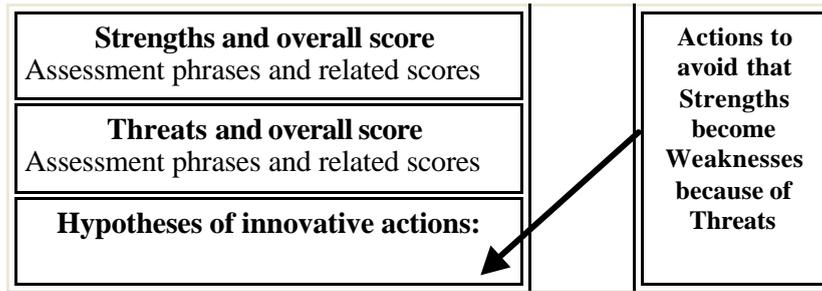
The relative weight of the Strengths, Weaknesses, Opportunities and Threats related to each of the 10 SLD aspects allows the respondent to focus her/his attention on how to improve the current situation through the identification of hypotheses of innovative actions.

The method consists on confronting Strengths and Threats on one hand, and Weaknesses and Opportunities on the other hand.

Steps 2 and 3: defining hypotheses of innovative actions concerning each of the 10 SLD Orientation aspects

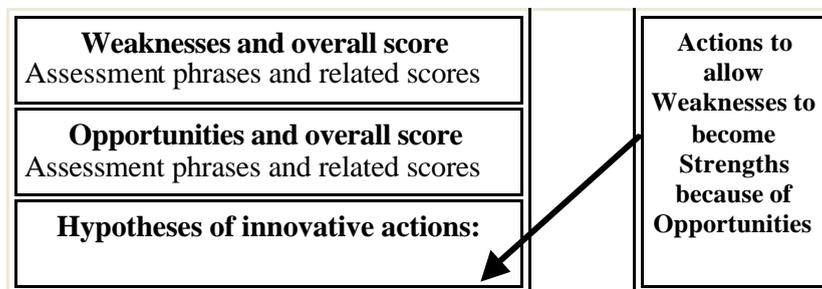
Hypotheses for innovative actions derive from considering how the Strengths (S) can overcome Threats (T) to avoid becoming Weaknesses (W).

To this end, the results of Step 1 are presented to the respondent through a form where she/he can read both the assessment phrases and the related scores in order to write the actions according to the formula: **S+T # W**



Other hypotheses derive from the capacity of utilising the identified Opportunities (O) as driving forces to transform Weaknesses (W) into Strengths (S).

To this end, the results of Step 1 are presented to the respondent through a form where she/he can read both the assessment phrases and the related scores in order to write the actions according to the formula: **W+O = S**



Hopefully a comprehensive hypothesis should be written looking at the overall results concerning Strengths and Threats and comparing them. Similarly, a comprehensive hypothesis should derive from the analysis and comparison of the overall results concerning Weaknesses and Opportunities and comparing them.

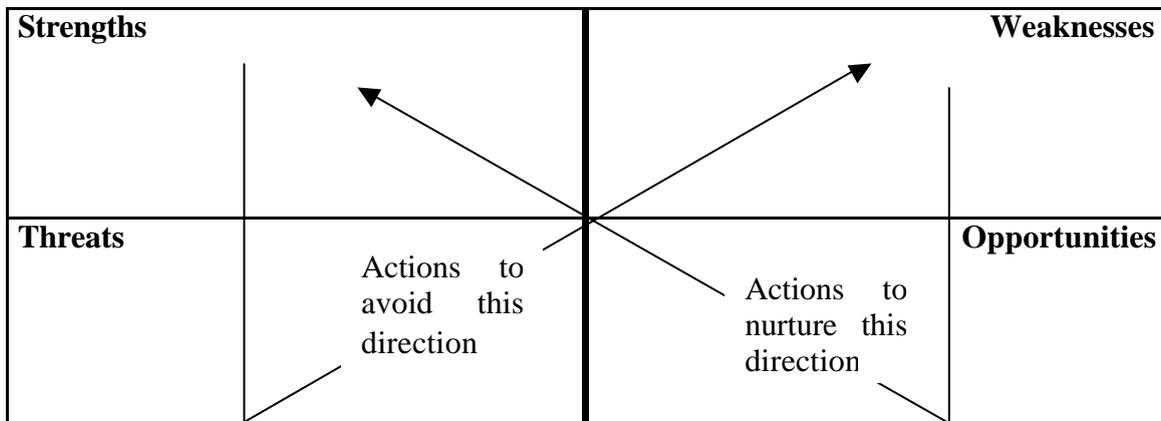
The challenging effort is to construct a leading hypothesis supported by coherent courses of actions with examples in brackets and aggregation formulae (like “for example, in particular, with attention to ...”).

The hypothesis must be introduced by a verb since it facilitates to perceive an action (e.g. to promote, to create, to foster, to facilitate).

Generally about ten – fifteen minutes of time are necessary to conceive and write the hypotheses utilising a pro-active creativity that looks at the future without being influenced by prejudices, conventional thinking and past experiences.

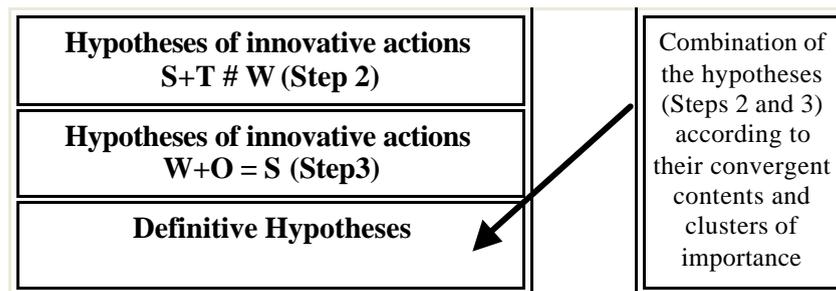
Step 4: merging the hypotheses of innovative actions concerning each of the 10 SLD Orientation aspects

Steps 2 and 3 give the following results:



These results must be further combined.

A final form presents the results of Step 2 and 3, allowing the respondent to compare the hypotheses of innovative actions in order to combine those that are similar and to cluster those that have a common end.



Step 5: aggregating all the individually defined assessments and innovative actions

Both the components of the project team and the Local Project Group answer the forms already mentioned. Therefore a large number of respondents produces a large number of analyses more or less with a similar degree of completeness.

The project team examines and aggregates the individual results (assessment phrases, scores and hypotheses of innovative actions) according to their similarity, difference and converging paths. The following form allows the project team to further work out the contents of the concerned hypotheses in terms of:

Short description = Purpose
Expected results
Financial and organisational measures

The several contents of each hypothesis can be in fact better constructed:

- some of them play an overarching role more than others; therefore contribute to the short description
- some of them describe expectations and probable results; therefore they can be utilised to identify the expected results
- some of them consider more practical issues than others looking for money, structures, systems and specific arrangements or procedures; therefore they can be utilised to focus the attention on concrete measures both of a financial and organisational nature

Pilot Initiatives structure

The final results of the SLD / SWOT analysis, namely the hypotheses of innovative actions:

- merge different views, needs and perspectives highlighted on the basis of the interviewed companies and women workers
- converge in the business Pilot Initiatives mainly consisting of activities concerning training, education, human resources, age and gender management, work organisation changes
- will be implemented after the end of a SLD project, in parallel with the Action Plans (Chapter 7)

The short description (purpose), expected results, organisational and financial measures of each final hypothesis are transferred in specific forms. In particular, the form on organisational and financial measures allows the project team, in consultation with the Local Project Group, to write for each strand of intervention:

- the time duration
- the necessary budget
- the source of financing
- the department or agency responsible for managing the envisaged measures

Probable sources of financing are: the Regional Operational Programmes and the Single Programming Documents related to the European Structural Funds; corporate plans to invest in human resources; funds from Chambers of Commerce, private financial institutes, association and networks of enterprises.

Additional resources are:

- human (e.g. trainers, consultants, evaluators, accountants and the ageing women workers themselves)
- material (e.g. free utilisation of premises and equipment)
- streamlining co-ordination and co-operation between the supporting bodies, the departments and services of the local public administrations (e.g. to access specific funds)
- mobilisation of local stakeholders and their networks (e.g. trade unions, trade associations, women associations and other civil society organisations)

The form on organisational and financial measures can be filled in if useful information are available, taking into account the Pilot Initiatives are elaborated by stakeholders and researchers to:

- favour further decisions
- improve business strategies without substituting for the normal procedures of industrial relations existing in the concerned local context
- be presented to the social partners (trade associations and trade unions) as a product to be further negotiated in order to arrive at agreements on each (or some) of the suggested measure

The presentation of the Pilot Initiatives will consist of three connected reports. Their draft versions are automatically produced by the on-line SLD system (see Chapter 10) and allow project team (researchers) to elaborate the final version with integrations on:

- Summary (4 paragraphs)
- Pilot Initiatives (10 Chapters, each concerning each of the 10 hypotheses)
- Workplace Analysis (10 Chapters, each concerning each of the 10 SLD Orientation Aspects)

Summary

This Chapter explains how to elaborate business Pilot Initiatives involving the local stakeholders through specific methods, procedures and instruments.

Methods, procedures and instruments	Purposes	Expected results
Samples & questionnaires	To understand company profile, strategy and performances together with living and working conditions of ageing women workers through three distinctive but converging questionnaires according to the 10 SLD Orientation aspects	A comprehensive overview that combines results from a sample of companies and a sample of women workers in the concerned case study areas
Descriptors, indicators and items of the questionnaires	To guide the field work with a clear orientation on What, Why and How to do in next years	Harmonisation of the contents of questionnaires in different case study areas while respecting and putting in value their diversities
Workplace Analysis	To utilise in a strategic way SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) on a comprehensive overview of the field work results according to the 10 Orientation aspects of the SLD approach and through five main steps	Collection and combination of individual opinions and points of view to determine comprehensive hypotheses of innovative actions
Pilot Initiatives	To merge all assessments and decisions in 10 main hypotheses of change to be correlated with those stemmed from the territorial Action Plans	Courses of actions aimed at improving the capacity to determine a better quality of working and living conditions in parallel with the Action Plans

A key role is played by the project team, in a close collaboration with the Local Project Group, to progressively integrate the contents of the business Pilot Initiatives with those of the territorial Action Plans.

The correlation between the two instruments is a key point to arrive at shared visions and paths of future development (in a 15 years' perspective) through the involvement of the local stakeholders: this is the task of the Local Scenario Workshops as it is illustrated in the following Chapter.

CHAPTER 9: LOCAL SCENARIO WORKSHOP

Introduction

The Sustainable Life Development (SLD) approach aims at improving the capacity of local stakeholders to think strategically (long term perspective) and to act immediately through an overarching picture of future development that allows hypotheses of innovative actions to be simplified, verified and integrated at business and territorial levels.

Local Scenario Workshop (LSW) serves to develop a shared vision and common paths on the future development (e.g. 15-year perspective) while facilitating a better correlation between business Pilot Initiatives (Chapter 8) and territorial Action Plans (Chapter 7).

LSW allows researchers and stakeholders to refine and reinforce the main hypotheses of innovative options developed through Local Context Analysis and Workplace Analysis.

LSW is carried out by the project team, in consultation with the stakeholders involved in the Local Advisory Group (LAG) and in the Local Project Group (LPG), through the following phases:

- final Stakeholder Analysis (Chapter 6) to enlarge the fields of interest, the points of view and the suggestions from the part of local representatives and actors
- two meetings with the above-mentioned stakeholders performed with specific brainstorming and creative techniques in order to define hypotheses of innovative actions and/or paths
- aggregation of the LSW results in a selected number of issues concerning the 10 Orientation aspects that answer the questions “What and Why” (Chapter 1) and “How” (Chapter 2) of the Sustainable Life Development (SLD) approach
- final integration of results both into the businesses Pilot Initiatives and the territorial Action Plans

Descriptors and Indicators of the SLD aspects utilised during the LSW are those already applied in the Local Context Analysis (Chapter 7) and Workplace Analysis (Chapter 8).

The following paragraphs describe the:

- Strategic thinking techniques
- Local Scenario Workshop structure

Strategic thinking techniques

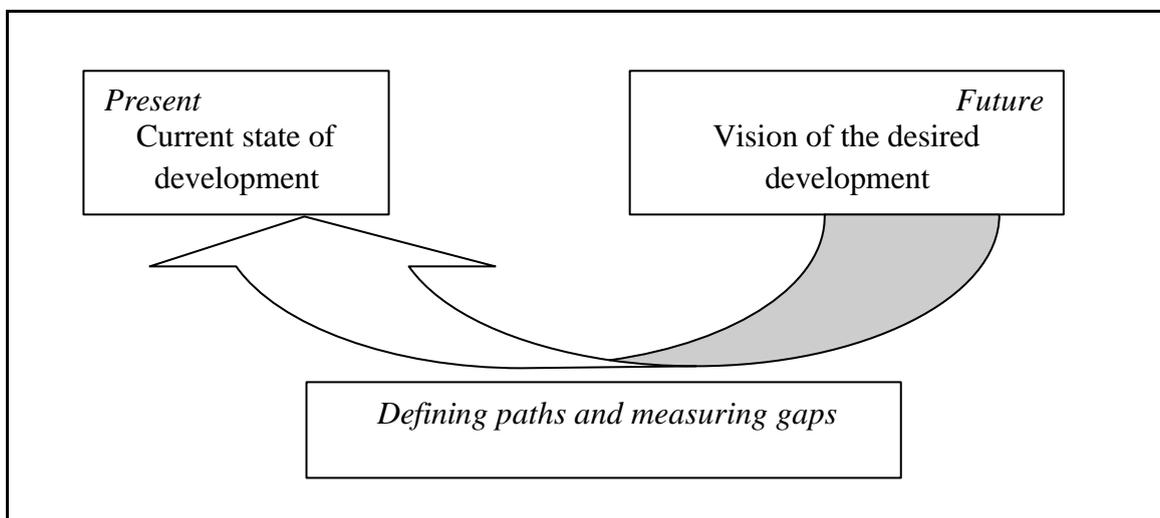
According to the Sustainable Life Development (SLD) approach, a scenario is an overarching picture of future development aimed at simplifying, verifying and integrating the hypotheses of innovative actions at business and territorial levels.

From a methodological point of view, a similar way of thinking connects:

- the original local scenario workshop method
- the backcasting techniques
- the SLD / SWOT analysis

All of them have a qualitative nature and are based on

- inverting the direction of thinking (from the future to the present times) versus conventional approaches for strategy planning
- taking into account the concerns of a range of stakeholders, rather than the concerns of single decision-makers only
- providing many inputs to the policy-making process



The original scenario workshop method

According to this method "Scenarios try to describe some hypothetical series of occurrences. By using a relatively comprehensive scenario, the analyst is able to bring forth occurrences and turning points demanding a critical choice. Afterwards these turning points can be examined more or less systematically. However, the scenarios should not be used to 'prove' anything. They are literary and educational aids rather than tools for rigorous analysis. They should be used to stimulate, illustrate and learn, they should provide us with precision and richness in communication and to check details" (Selstad, T., 1991).

The process of building scenarios begins with the identification of driving forces, the forces that influence the outcome of events: “Thus, in writing scenarios, we spin myths – old and new – that will be important in the future ... These myths in scenarios help us come to grips with forces and feelings that would not otherwise exist in concrete form. They help us describe them, envision them, bring them to life – in a way that helps us make use of them” (Schwartz P., 1999).

The methodology to perform a Workshop (Jungk R. and Norbert R. M., 1984) is based on:

- involving local actors in the processes of change and development
- facilitating and supporting creativity and communication
- creating equalised communication to eliminate the influence of power relation between the actors

The scenario workshop method was originally developed in the European project Fleximodo, in specific fields of research (Drewes Nielsen L. and Gjesing Hansen L., 1997; Drewes Nielsen L. & Homann Jespersen P., 2003) and applied to the European project INNESTO that formulated the Sustainable District Logistics approach.

The backcasting techniques

Backcasting is a particular form of scenario building, where the scenarios are chosen to reflect desirable “visions“ of development and policy packages are constructed to be consistent with these images of the future (Dreborg K., 1996 and Robinson J. 1990).

There are fundamental differences between forecasting and backcasting (Dreborg K., 1996; Rienstra S., 1998) since the latter improves the ability to identify trend-breaches, to generate more creative policy options and to include a larger number of policy considerations.

Forecasting	Backcasting
Focus on quantified variables	Focus on qualitative picture
More emphasis on details	More emphasis on trend breaches
Results determined by the current situation	Results determined by future images
From past to present and slightly to future	From future to present
Deterministic analysis	Creative thinking
Closed future	Open future
Statistical econometric tests	Plausible thinking
From simple to complex	From complex to simple
From quantitative to qualitative	From qualitative to quantitative
Re-active problem solving	Pro-active problem solving
Implicit assumptions and prejudices	Explicit assumptions without prejudices
Limited set of options	Open range of options
Model-oriented mind based on presumed certainty	Ecological mind capable to deal with uncertainty
<i>Adapted from Rienstra S., 1998</i>	

According to Dreborg K. (1996), backcasting is particularly favourable when:

- the problem being studied is complex, affecting many sectors and groups in society
- there is a need for a major change, rather than marginal change
- dominant trends are part of the problem and cornerstones of forecasts
- the problem is mainly due to externalities, which the market cannot properly address
- the time horizon is long enough to allow considerable scope for deliberate choice.

The backcasting techniques were utilised inter alia by the European project POSSUM, the projects on energy futures (e.g. Löhnroth M. et al, 1980; Johansson T. et al, 1983) and on sustainability futures (e.g. Olson R., 1994).

The SLD / SWOT analysis

As already described (Chapters 7 and 8), the SLD / SWOT analysis:

- provides the glasses (the SLD aspects) through which it is possible to have a comprehensive picture that combines future situations (Opportunities and Threats) and actual conditions (Strengths and Weaknesses)
- looks at the future to determine hypotheses that improve the present situations and anticipate favourable changes

SWOT analysis is therefore utilised strategically (long term change) and with a clear orientation (sustainable development and life). This combination of factors is one of the main innovative methods promoted by the Sustainable Quality Management (SQM) system, as it was in the European project INNESTO.

Local Scenario Workshop structure

The composition of the Local Scenario Workshop (LSW) can be variable but within a suggested ceiling of 20 – 25 stakeholders that allows the project team to perform the visioning exercises in a right and fruitful way.

As already specified (Chapter 6), a final Stakeholder Analysis is carried out by the project team to answer a main question: “Who was excluded from the debate and why?” The final Stakeholder Analysis takes into account issues and lessons derived from the experimentation with the LAG and LPG, namely:

- diversity and overlap between LAG and LPG members
- women participation
- stakeholder involvement and contribution to the project

Generally, two thirds (2/3) of LSW are stakeholders already involved in LAG and LGP and one third (1/3) consists of persons who did not participate in any phase of the project development.

Each project team, in collaboration with the Local Advisory Group and the Local Project Group:

- compares the contents of the territorial Action Plan (Chapter 7) and business Pilot Initiatives (Chapter 8)
- selects few but relevant topics (five questions at the maximum) that refer to a limited number of the 10 SLD Orientation aspects

Topics (Questions)
1.
2.
3.
.....

The LSW debates the selected questions to reinforce some hypotheses of innovative actions, to enlarge the spectrum of analysis of other hypotheses and to include new points of view on courses of action that have been already defined.

The LSW is organised through:

- two distant sessions from each other (some days or a week)
- two interrelated phases in the first session (more or less six hours as a whole)
- a single phase in the second session (more or less six hours)
- presentation rounds of the participants
- plenum and group activities
- tags (e.g. small sheets, preferably post-it) where the participants write sentences
- wallpapers utilised to collect sentences and to present the results of the LSW activities

The first session of the LSW is divided into two phases:

- the criticism phase where an assessment exercise is performed under the statement “Today everything is wrong”
- the utopia phase where a vision-making exercise is performed under the statement “Everything is possible in a 15 years’ perspective”

The second session of the LSW consists in the realisation phase where an exercise is performed to identify paths that connect “Everything is possible” and “Everything is wrong” under the statement “Today we initiate new actions aimed at ...”.

All the three phases, supported by facilitators, are based on brainstorming and creative methods supported by a specific set of rules to secure a free and open debate:

- short statements
- no discussion of statements
- all statements are allowed

All the suggested procedures should be anyhow utilised in a flexible way according to the cultural characteristics of the concerned territory.

First session: Criticism and Utopia phases

Similar procedures connect the criticism and utopia phases, both of them carried out in plenary session.

Same time should be given to perform the two phases with a close attention to regulate and co-ordinate all procedures.

In the criticism phase, each participant is asked to focus the attention on the current situation and to formulate short statements on what is “wrong” today according to her/his opinion.

In the utopia phase each participant is asked to imagine a future scenario (15 years from now) where everything is possible and to formulate short statements on what is “right” according to her/his expectations.

The main purpose in both the phases is to collect as many opinions and ideas as possible.

Two wallpapers are respectively marked “Criticism” and “Utopia”.

Tags are given to each participant to formulate 3 phrases at maximum.

Tags are collected (attached or written) in the two wallpapers.

Facilitators stimulate possible aggregations between the individual statements.

Two methods can efficiently speed up this collective exercise while facilitating aggregation of several statements.

The first method starts with writing the statements of a first participant on the related wallpaper. The following participants are asked to verify which points of view are in common or can be shortly integrated. Otherwise new phrases are written on the wallpaper. Generally the last participants agree upon many of the already written formulations.

The second method starts with drawing several rows in the wallpaper. A first participant attaches her/his tags in different rows. The following participants attach their tags close to those already positioned if they have similar contents and meanings. Otherwise other rows are utilised. Generally there is not need to add any other rows for the last participants, since they agree upon many of the already attached statements.

Priorities can be assigned to the aggregated statements, but this is not an essential requirement. When it is useful or necessary, the participants are asked to vote for the aggregated statements they find most important. Each participant has a number of votes that correspond to the number of the written statements. She/he can attribute the votes to several statements on the wallpapers, as well as in the extreme case of putting all votes on one statement only.

After the voting the facilitators count the points and form two lists of prioritised statements on current situations (criticism phase) and future expectations (utopia phase).

The first session ends in 2 separate tables that summarise the results of the Criticism and the Utopia phases.

Criticism (today) <i>Statements (optional priority)</i>	Utopia (15 years from now) <i>Statements (optional priority)</i>
XXX (1)	XXX (1)
XXX (2)	XXX (2)
XXX (3)	XXX (3)
.....

Second session: Realisation phase

The project team rephrases the results of the two tables (criticism and utopia) when necessary, compares their contents and selects key issues.

A short list of these issues is presented to the participants in the second session (realisation phase). If it is useful, some relevant data, extracted from the Local Context Analysis and the Workplace Analysis, can be added to the presentation.

In this session, stakeholders perform a simplified SWOT analysis on the selected key issues.

The starting exercise is carried out in a plenary session, but sometime, when many issues are at stake, it is necessary to work in small groups (five at the maximum, each of them with five persons). It is however warmly recommended to concentrate the attention on five issues to the utmost.

The following procedures are adopted:

- the selected issues (possibly five) and the associated descriptors of the SLD Orientation aspects are written on a large wallpaper in big characters
- participants are requested to take into consideration all the issues and descriptors
- tags are given to each participant to formulate 3 phases at maximum, respectively for Strengths, Weaknesses, Opportunities, Threats related to the entire short list of key issues
- about five minutes of time are given to write short statements concerning each SWOT component
- once completed one SWOT component (for instance Strengths), the resulting tags are collected by the facilitator
- about three minutes are given to the participants to rest before starting the exercise concerning the following SWOT component

As a total, nearly forty minutes are necessary to complete the SLD / SWOT analysis of the short list of selected issues.

All the individual statements (tags) are reported (written or attached) in wallpapers respectively marked with one of the specific headlines “Strengths, Weaknesses, Opportunities, Threats” while the facilitator stimulates possible aggregations between the individual statements.

Two methods can efficiently speed up this collective exercise while facilitating aggregation of several statements.

The first method starts with writing the statements of a first participant on the related wallpaper. The following participants are asked to verify which points of view are in common or can be shortly integrated. Otherwise new phrases are written on the wallpaper. Generally the last participants agree upon many of the already written formulations.

The second method starts with dividing the wallpaper in several rows. A first participant attaches her/his tags in different rows. The following participants attach their tags close to those already positioned if they have similar contents and meanings. Otherwise other rows are utilised. Generally there is not need to add any other rows for the last participants, since they agree upon many of the already attached statements.

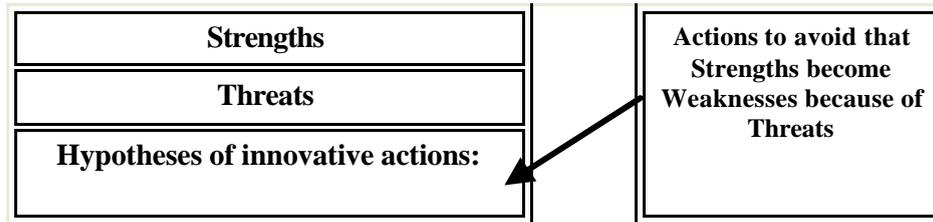
Generally each separate wallpaper takes thirty minutes of time at the maximum to be filled in.

Therefore two groups are created to compare the wallpapers (tables) of Strengths and Threats on one hand, and the wallpapers (tables) of Weaknesses and Opportunities on the other hand.

Each group nominates a co-ordinator assisted by a facilitator.

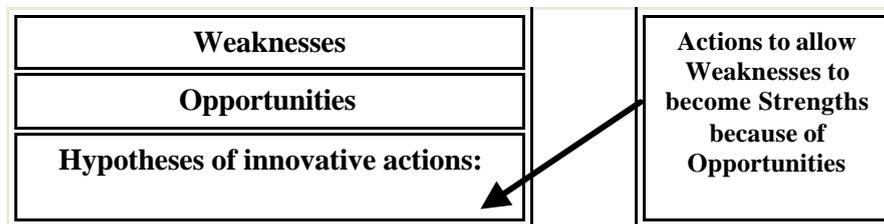
The first group defines hypotheses for innovative actions considering how the Strengths (S) can overcome Threats (T) to avoid becoming Weaknesses (W).

The formula is: $S+T \neq W$



The second group defines hypotheses for innovative actions considering how the Opportunities (O) can transform Weaknesses (W) into Strengths (S).

The formula is: $W+O = S$



Hypotheses are recommended to be formulated with examples in brackets and aggregation formulae (like “for example, in particular, with attention to ...”).

Hypotheses must be introduced by a verb since it facilitates to perceive an action (e.g. to promote, to create, to foster, to facilitate).

Hypotheses are formulated individually by each component of the two groups. A maximum of three hypotheses are requested for each participant.

Hypotheses should be elaborated taking into consideration all statements reported in the wallpapers. Participants can however focus their attention on a limited number of statements.

Generally about ten – fifteen minutes of time are necessary to conceive and write the three hypotheses utilising a pro-active creativity that looks at the future without being influenced by prejudices, conventional thinking and past experiences.

For each group, all hypotheses are collected and aggregated in a new wallpaper marked with the related formula ($S+T \neq W$ or $W+O=S$).

The most efficient method is to start with the hypotheses of a first participant, asking to the others if they have similar points of view that allow the group to integrate the various statements.

Generally more than thirty minutes of time are requested by this final aggregation.

Eventually, the co-ordinators present the results of the two groups to all the participants in terms of:

Strengths		Weaknesses
Threats		Opportunities
Hypotheses of innovative actions		Hypotheses of innovative actions

If time is available, a conclusive exercise can be made to determine a vision shared by the stakeholders. To this end, it is suggested to carry out a free open debate introduced by the SLD project leading vision.

If time is not enough, the project team elaborates a statement that summarises the LSW vision considering the debate among the stakeholders and its results.

Eventually, the project team integrates the hypotheses of innovative actions derived from LSW with those concerning corporate Pilot Initiatives and territorial Action Plans.

The on-line SLD system provides a downloadable template to transfer the LSW results in a single report.

Summary

This Chapter explains how to carry out a Local Scenario Workshop (LSW) involving the local stakeholders through specific methods, procedures and instruments.

Methods, procedures and instruments	Purposes	Expected results
Scenario and backcasting techniques, SLD / SWOT analysis	To improve capacity for strategic thinking	A wider range of interests (stakeholders) involved in more creative policy options that move “from future to present” times
Local Scenario Workshop	To determine shared visions and paths that correlate Action Plans and Pilot Initiatives in a long term (15 years) perspective	Hypotheses of innovative actions strengthened and integrated at business and territorial levels

Local Scenario Workshop takes stock of other operational phases of a SLD project to arrive at shared visions and paths of future development (in a 15 years’ perspective) through the involvement of the local stakeholders.

Playing this role, the LSW is a conclusive point of arrival for a SLD project but hopefully a point of departure for implementing the business Pilot Initiatives and the territorial Action Plans in the following years.

CHAPTER 10: ON-LINE SLD SYSTEM

Introduction

The Sustainable Life Development (SLD) approach aims at supporting local stakeholders to evaluate and decide.

The on-line (Internet-based) SLD system is a central product that supports researchers and stakeholders to assess current situations (e.g. local contexts and workplaces), to elaborate innovative actions (e.g. plans and initiatives) and to monitor their implementation.

The on-line SLD system:

- is as user-friendly as possible for a wide range of clients (researchers, local authorities, social partners, women organisations, environmental associations, etc.)
- is accessible to registered users while favouring a permanent interaction with them
- has several but interrelated sections, e.g. Users, Aspects, Descriptors, Stakeholder Analysis, SWOT Analysis, Indicators, Questionnaires, Action Plans, Pilot Initiatives, Local Scenario Workshop
- provides instructions and suggestions to follow methods and procedures
- allows researchers to store and elaborate data
- elaborates harmonised and well-printable draft reports on the results of operations carried out by researchers and stakeholders

The on-line SLD system is conceived to carry out the following operations.

Stakeholder Analysis (Chapter 6)

Through the Stakeholder Analysis, each project team (researchers) identifies locally relevant actors to be involved in three different groups: Local Advisory Group (LAG), Local Project Group (LPG) and Local Scenario Workshop (LSW).

The project team downloads appropriate questionnaires from the on-line SLD system. The questionnaires contain specific criteria of selection for each stakeholder group.

For the LAG creation:

- interest (in the work of the group and to foster decisions and initiatives in relation to specific fields of activity)
- influence (to block decisions and initiatives)
- impact (capacity for being affected by decisions and initiatives)

- information (possession of data needed to contribute and to facilitate decisions and initiatives)
- involvement degree (total score of the previous criteria in terms of importance of her/his participation for the work of the group).

For the LPG creation:

- disciplinary background (fields of knowledge and expertise of the person)
- role (played in the stakeholder organisation)
- excellence (field of activity, interest and quality of the stakeholder organisation).

For the LSW formation:

- diversity and overlap between LAG and LPG members
- women participation
- stakeholder involvement and contribution to the project

Action Plans (Chapter 7)

Territorially-based Action Plans derive from hypotheses of innovative actions devoted to ageing women workers.

These hypotheses are defined through a Local Context Analysis (LCA). To this end, each project team, supported by the Local Advisory Group, evaluates:

- the "Orientation" towards SLD (10 aspects) of the local context taking into account a series of significant local projects
- the consistency of "Social Potential" (distinguished in Institutional Capital, Human Capital and Social Capital) existing in the local context (16 aspects)
- the "Dynamics" of change combining the quality of local projects with the characteristics of the local contexts (6 aspects)

Detailed descriptors for each of the above aspects are always visible to support evaluation and decision making processes.

The evaluation is made through a SLD / SWOT analysis looking at the descriptors of the 32 SLD aspects and arriving at elaborating hypotheses of innovative actions.

The on-line SLD system allows each registered user to write some sentences and scoring them in separate and simple forms entitled Strengths, Weaknesses, Opportunities and Threats, without having the possibility to look at the results of each form.

The results appear only at the end of the exercise, when improvements and changes can be made.

Two separate and subsequent forms show Strengths and Threats on one hand, and Weaknesses and Opportunities on the other hand. These combinations allow the registered users to write hypotheses for innovative actions.

The first form regards how the Strengths can overcome Threats to avoid becoming Weaknesses.

The second form regards how Opportunities can transform Weaknesses into Strengths. Then, a further form allows the registered users to compare the hypotheses in order to combine those that are similar and to cluster those that have a common end.

A specific section is created to store data concerning indicators related to each SLD aspect. Each database is manageable for further data elaboration.

Once 32 hypotheses of innovative actions are determined, they must be aggregated answering a key question: what transformation levers (Dynamics) could be utilised to better act on the local key factors (Social Potential) in order to promote feasible paths towards a sustainable life (Orientation)?

Forms provided by the on-line system follow a method consisting of basic steps:

- to connect innovative actions concerning the 6 Dynamics aspects with the 10 Orientation aspects in order to identify feasible trajectories towards SLD
- to place the innovative actions referred to the Social Potential (16 aspects) along the above-mentioned 6 trajectories
- to cluster together the hypotheses that summarised the main contents of the 6 trajectories
- to prioritise them according to their strategic relevance in terms of overall value added in the territorial and sectoral dimensions taken into account by the case studies

Forms concerning the hypotheses of innovative actions include a short description (purpose), expected results and organisational and financial measures.

Draft reports are produced by the on-line system with the following structure and they will be improved by the Project Teams once downloaded from the system.

Summary, 4 paragraphs	
Introduction	Free text, e.g. number of stakeholders and researchers involved, main process of involvement, other useful considerations
Profile	Representation of the summarised scores of SLD / SWOT analysis (automatically produced by the system)
Vision	Free text
Missions	Priority and short description (purpose) of the six resulting main hypotheses of innovative actions (automatically produced by the system)

Action Plan, 6 Chapters	
1 chapter for each of the 6 main hypotheses of innovative actions. Each Chapter has:	
Short description (purpose)	Automatically produced by the system, but a free text can be added
Expected results	Automatically produced by the system, but a free text can be added
Organisational and financial measures	Automatically produced by the system with a grid useful to specify: 1) Time duration; 2) Budget; 3) Financing source; 4) Department / Agency responsible for managing the measures

Local Context Analysis, 32 Chapters	
1 chapter for each of the 32 SLD Aspects. Each Chapter has	
Descriptor	Automatically produced by the system
SLD SWOT	Automatically produced by the system
Hypotheses of innovative actions	Short description (purpose); Expected results; Organisational and financial measures Automatically produced by the system
Indicators	Automatically produced by the system

Pilot Initiatives (Chapter 8)

Pilot Initiatives derive from hypotheses of innovative actions devoted to ageing women workers in several areas of business strategy.

These hypotheses are defined through a Workplace Analysis (WA). To this end, each project team, supported by the Local Project Group, analyses work organisation, business performances, organisational behaviour and human resources strategies, looking also at changes that can favour a prolonged involvement of the ageing women workers, their abilities, skills and training improvement.

Only the 10 aspects of the SLD Orientation are utilised to carry out the Workplace Analysis.

The on-line SLD system has sections dedicated to:

- detailed descriptors for each of the above mentioned 10 aspects
- two separate questionnaires to be administered respectively to a sample of businesses and a sample of women workers
- storage and aggregation of data stemming from the above-mentioned questionnaires
- a benchmarking questionnaire where the interested companies can insert data from their balance sheets to verify performances according to the 10 SLD indexes
- a SLD / SWOT analysis on the features of companies and women workers resulting from the above mentioned questionnaires that allow the project team (researchers) and Local Project Group (stakeholders) to elaborate hypotheses of innovative actions in terms of short description (purpose), expected results and organisational and financial measures

Draft reports are produced by the on-line system with the following structure and they will be improved by the Project Teams once downloaded from the system.

Summary, 4 paragraphs	
Introduction	Free text, e.g. number of stakeholders and researchers involved, main process of involvement, other useful considerations
Profile	Representation of the summarised scores of SLD / SWOT analysis (automatically produced by the system)
Vision	Free text
Missions	Short description (purpose) of the ten hypotheses of innovative actions (automatically produced by the system)

Pilot Initiatives, 10 Chapters	
Each Chapter has	
Short description (purpose)	Automatically produced by the system, but a free text can be added
Expected results	Automatically produced by the system, but a free text can be added
Organisational and financial measures	Automatically produced by the system with a grid useful to specify: 1) Time duration; 2) Budget; 3) Financing source; 4) Department / Agency responsible for managing the measures

Workplace Analysis, 10 Chapters	
1 chapter for each of the 10 SLD Orientation Aspects. Each Chapter has:	
Descriptor	Automatically produced by the system
SLD SWOT	Automatically produced by the system
Company Profile	Automatically produced by the system
Women condition	Automatically produced by the system
Company Benchmarking	Free text: probable examples of good performances according to SLD indices

Local Scenario Workshop (Chapter 9)

Through the Local Scenario Workshop (LSW), the Pilot Initiatives are correlated to the Action Plans through a shared vision of the future scenario (15 years from now) capable of representing a coherent development of the age and gender management strategy.

A Local Scenario Workshop (LSW) is carried out in two distant sessions from each other (some days or a week). Both the sessions are based on brainstorming and creative methods.

The first session consists of the criticism phase (everything is wrong) and the utopia phase that looks a 15 years perspective (everything is possible).

The second session regards the realisation phase, where the results of the previous session are presented to all the participants. The participants are requested to formulate their own hypotheses of innovative actions or plans in terms of guidelines, performing an SLD-SWOT analysis on a selected and limited number of SLD Orientation aspects.

The on-line SLD system provides a template for reporting the LSW main results. The project team downloads and utilises the template report that has the following structure.

Local Scenario Workshop, 4 paragraphs	
Introduction	Free text, e.g. number of stakeholders and researchers involved, main process of involvement, other useful considerations List of starting key questions
Vision	Free text, e.g. adaptation of the project leading vision
Criticism and Utopia	2 tables on results of: 1) The criticism phase (“Today everything is wrong”) and 2) The utopia phase (“Everything is possible in a 15 years’ perspective”)
Realisation	Hypotheses of innovative actions

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