

AMS and Amu Technical Assistance Projects in Poland 1994–1995

**AMS – the Swedish Labour
Market Board**

**Amu – the Swedish State-owned
vocational training institute**

**Susanne Oxenstierna
Irena Lundberg
Henrik Huitfeldt**

**Department for Central and
Eastern Europe**

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**Sida Evaluation 97/20
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and Eastern Europe**

Sida Evaluations may be ordered from:

Bistandsforum, Sida
S-105 25 Stockholm
Phone: (+46) 8 698 5722
Fax: (+46) 8 698 56 38

Authors: Susanne Oxenstierna, Irena Lundberg, Henrik Huitfeldt

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SWEDISH INTERNATIONAL DEVELOPMENT COOPERATION AGENCY

Address: S-105 25 Stockholm, Sweden. Office: Sveavägen 20, Stockholm
Telephone: +46 (0)8-698 50 00. Telefax: +46 (0)8-20 88 64
Telegram: sida stockholm. Telex: 11450 sida sthlm. Postgiro: 1 56 34-9
Homepage: <http://www.sida.se>

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Executive Summary

The purpose of this report is to provide an evaluation of the AMS and Amu technical assistance projects with the National Labour Office in Poland and the vocational training organisation ZDZ which have been financed by BITS and Sida between 1994 and 1995. The main dimensions of the evaluation are: Achievements of objectives, relevance, whether the results are sustainable, side-effects, efficiency of project implementation and cost-efficiency. In addition, the report gives Sida recommendations on the potential of supporting future projects and suggests improvements in project objectives and design.

- ◆ The main topic - labour market policy - is highly relevant in the transformation of the Polish society. The Swedish experience can be efficiently transferred to Poland, if the process is carried out in a flexible way.
- ◆ The objectives of the two projects have, without exceptions, been fulfilled.
- ◆ *AMS project.* The Swedish efforts have resulted in developing a modern employment service, in particular in the model offices where the Swedish consultants have been active. This includes the separation of placement service from the payment of unemployment benefits and the introduction of active work with employers to increase the number of vacancies reported to the labour offices. Also, management of the offices has been arranged according to functional lines and responsibilities are clearly delegated to department heads.
- ◆ *AmuInternational project.* The Amu-project has visible and sustainable effects. The concept of *modular training* has been introduced and implemented. The six training courses developed during the project are widely applied also in regions not directly involved in the project. Modern management techniques and an understanding for the need of marketing training in a competitive environment have been successfully transferred.
- ◆ The success should be credited both the Polish and the Swedish parties. The Poles involved have been highly competent and deeply engaged in the project activities. The Swedes have professionally delivered their know-how without imposing Swedish solutions on their counterparts. The Poles have adapted the Swedish solutions to their own reality, taking their restrictions into consideration.
- ◆ The cost efficiency of the various components of the projects are, on the whole, satisfactory. Sida should, however, recommend a standard form for how to present costs for evaluation purposes. Particularly when an evaluation is done late after the conclusion of a project, it is difficult to reconstruct cost figures.
- ◆ There are no particular side effects of the projects. AMS originally started its co-operation because two of the experts had earlier worked as ILO-consultants in Poland. Amu has been engaged in the World Bank project training Polish vocational course developers.

- ◆ The gender equality aspect is not directly addressed in the projects. However, since the major part of labour office personnel are women, women have profited from the AMS-project being its main recipients. The Amu project has resulted in training courses largely in female professions. Since Polish women have higher unemployment rates than men, and lower outflow from unemployment, efforts in the labour market area may have indirect positive gender equality effects.
- ◆ It is proposed that the co-operation be continued provided that the Polish side expresses its wish to do so. The co-operation should be long-term but low-key: The Polish counterparts are well capable of adapting Western experiences and limited input can have a considerable impact.
- ◆ The new project proposals are basically replicas of the past projects with new recipient regions and participants. The main differences are that there is no model office activities in the AMS proposal, and that Amu concentrates on management questions instead of modular curricula development. The evaluation team suggests that the new projects should be stronger linked to past project efforts and participants. Previous participants have asked for follow-up contacts in different areas, and small efforts could result in large effects. In addition, previous participants could be used as trainers in new projects.
- ◆ Both the Polish and the Swedish sides are well aware of other international co-operation in the field. Both Polish organisations decide centrally to which region assistance should be directed. Thus, there is very little risk of duplication of efforts from different donors.
- ◆ Despite central co-ordination of donor assistance in the labour market field in Poland, some aspects need further elaboration. It appears that donor assistance, particular in the employment service area, from one country is seen as equal to donor assistance from another. However, since technical solutions, and sometimes basic approaches, differ between countries, there is a risk that the employment service ends up with disparities and compatibility problems in the future. It is therefore recommended that Sida supports initiatives aiming at sharing experiences between employment officers having had assistance from different donors, as well as activities directly aiming at streamlining and unifying the system.
- ◆ AMS and Amu have been particularly active on the local level. In order to strengthen the diffusing of relevant project results over the country, it is of great importance that the central and county (*voivodship*) level are involved in the projects.
- ◆ The Polish side now starts developing contacts with other transition economies. In some instances, seminars on labour market issues have been arranged by the Polish side and a Western party for participants from these countries. Since Sida funds labour market projects in several other transition countries with AMS and Amu as contractors, Sida should consider the relevance of possible joint efforts in the future.

I Project Description

1. *The Objectives of the Evaluation Report*

AMS (the Swedish Labour Market Board) and AmuInternational (the Swedish state-owned vocational training institute) started technical assistance co-operation with Polish labour market authorities in 1990. The first project (POL 0061) was evaluated in 1993, and BITS, later Sida, has continued financing the co-operation by approving additional projects developing employment service and labour market training in Poland.

The projects subject to evaluation are:

1. The AMS project on development of labour market institutions. BITS 14 March 1994, project number POL0062, 2.4 million SEK.
2. The Amu project on labour market training. BITS 6 May 1994, project number POL0063 1.8 million SEK.

The main dimensions of the evaluation are¹:

Evaluation of Past Co-operation

- Achievements of objectives. Achievement of the project goals as defined in the contracts, taking into account possible changes in circumstances.
- Relevance. The relevance of the project approach, goals and services provided during the technical co-operation in the perspective of the labour market situation and in relation to the needs they intended to service.
- Efficiency in the project implementation
- Reasons for high/low achievements of goals.
- Side effects
- Cost efficiency
- Conditions for sustainable effects of the projects.

Opportunities for Continued Co-operation

- The relevance of proposed long and short term objectives and potential impact of the transfer of knowledge from Swedish inputs
- Organisational strength of and weaknesses of the concerned Polish organisations
- Tangible results and long term development effects

¹ See Terms of Reference for the Consultancy Assignment (*Appendix A1*)

- Need for co-ordination with other institutions and other donors
- Possibilities of cost-sharing in future projects

In addition the evaluation should describe the institutional structure, including roles and responsibilities, in the field of labour market policy and labour market training in Poland.

Based on the above findings, the team should give Sida **recommendations** on the potential of supporting future projects and, if relevant, suggest improvement of existing proposals with regard to project objectives, organisation and other aspects relevant for achieving the best development effect.

2. *The Team*

The evaluation assignment was entrusted to a team of three persons: Dr Susanne Oxenstierna specialises in labour market economics and other issues in transition economies. She has been working in different development projects in Russia. Ms Irena Lundberg is a project manager of the City of Stockholm Development and Promotion Office (SML), in particular she manages projects in the Baltic region. Mr Henrik Huitfeldt is a labour economist and economic analyst at Sida

3. *Method*

The report is based on interviews with key persons and with participants who have been engaged in different project activities and project implementation. In Sweden the interviews were made by Susanne Oxenstierna and Irena Lundberg. In Poland most interviews in Warsaw were made by the full team, but team members split for reviewing effects in the regions, e.g. the visits to Lodz, Szczecin, Slupsk and Gdansk were made by Oxenstierna and Lundberg, and those to Torun and Bialystok by Huitfeldt. The interviews took place in February 1997.² The discussions with the various stakeholders of the projects were frank and fruitful. We feel convinced that all important facts have been presented.

In addition, the team has studied and analysed all relevant materials, i.e. decisions, project reports, statistic and economic analyses of the Polish labour market, and material produced in the course of the execution of the projects. A first draft report was submitted in late March 1997.

² See List of Interviewed Persons (*Appendix A2*)

II The Polish Labour Market

1. Employment and Unemployment

The recession was shorter and more shallow in Poland than in the other Central and Eastern European countries. Poland was the first country in the region to reach its pre-transition level of GDP 1996. During the contraction period, 1990-91, the fall in employment accompanied the fall in production. Since production started to grow in 1992, employment has only slightly recovered. In 1996, employment was still 14 percent below its pre-transition level. The informal economy may somewhat disturb the picture. According to official estimates, employment in the informal economy amounted to 13 percent of the labour force in 1995.¹ The informal sector was large also in the 1980s, but some of the decrease in official employment has been absorbed by the informal economy.

In addition, the transition period has been associated with structural change. A fall in employment in the public sector has partly been absorbed by an increase in private sector employment. The private sector share of total employment increased from 46 percent to 62 percent between 1989 and 1995. The relative changes in employment by sector is by far less than the relative changes in production. For example, when the share of employment in the agriculture sector decreased with two percentages between 1989 and 1995 (to 26 percent of total employment), the share of agriculture in GDP almost halved (to only 6.6 percent of total GDP). Thus, employment in Poland has not yet on a large scale reacted to changes in production and only moderate labour shedding has taken place.

Increasing labour force

In most transition countries, the number of persons in the labour force decreased sharply. Poland followed a different pattern. The labour force increased by more than two percent between 1989 and 1995. This is a remarkable high number when we take into account the decreasing employment opportunities and that a large number of persons left the labour force entering different types of early retirement schemes. Common explanations to this phenomena is the demographic situation and that generous monetary and non-monetary benefits for registered unemployed induced persons not participating on the labour market to enter unemployment.²

Unemployment rates

Two sources on measuring unemployment exist: the number of registered unemployed and a quarterly labour force survey from the Central Statistical Office. The labour force survey (LFS) is compatible to the international recognised definition on unemployment (ILO). To be recorded as unemployed in the survey a respondent must fulfil three conditions: not work during the reference week, search actively for a job, and be able to start a new job within two weeks. In Poland, the unemployment rate according to the survey is 11.5 percent (November 1996) and the registered

¹ Kalaska & Witkowski (1996)

² Gora *et al.* (1996)

unemployment rate 13.5 percent (January 1997). The difference is partly due to the fact that some of the persons registered as unemployed do not search for a job.

The official unemployment rates are probably overestimated by two reasons. First, a large fraction of the unemployed are employed in the informal sector and, second, some of the unemployed do not search actively. It is difficult to judge how large implications these effects have on the unemployment rate, but they are likely to be of a significant magnitude.³

The unemployment rate increased steadily until the beginning of 1994 and then it started to fall back slowly (*Table II:1*). The downward trend in unemployment is expected to continue in response to the production increase and increasing efforts to monitor the unemployed.

Gender differences

The Polish labour market is still very much differentiated between female and male jobs. Women have a higher unemployment rate than men, but that is not due to more severe labour shedding in female sectors, instead women have a lower outflow rate from unemployment. It is difficult to judge to what extent this is due to discrimination against women or to their own behaviour in the market. For example, job search intensity is much lower for women than men.⁴

Regional differences

Unemployment rates vary a lot from one county, *voivodship*, to the next and even within regions. In June 1996, the unemployment rate recorded by the labour offices vary from 5.0 percent in Warsaw to above 25 percent in Slupsk and Koszalin in the north-west. Regional differences are rooted in structural differences and they seem to be persistent, caused by among others disturbances at the housing market. The unemployment rates are high in regions dominated by former state-owned agriculture and areas dominated by declining industries.⁵

<i>Table II: 1</i>	<i>Employment and Unemployment Rates in Poland 1992-1996</i>				
	1992	1993	1994	1995	1996
Employment (<i>thousand</i>)	15 010	14 761	14 924	14 967	14 968
Unemployment (LFS ⁶ , <i>percent</i>)	13.5	14.0	14.4	13.3	12.4
<i>Women</i>	13.5	15.0	15.4	14.1	13.9
<i>Men</i>	11.5	12.1	12.5	11.2	11.0
Registered unemployment (<i>percent</i>)	12.9	15.0	16.5	15.2	14.3

Source: Ministry of Labour and Social Affairs and Central Statistical Office.

2. Active and Passive Labour Market Policies

When the growth of the number of unemployed was out of control in the early 1990s, most of the resources for labour market policy were used for passive measures as unemployment benefits. The emphasis has since then step by step changed towards

³Gora *et al.* (1996)

⁴Gora *et al.* (1996)

⁵OECD (1996)

⁶ According to the labour force surveys.

active measures. This process is slow, however. In 1996, only 13 percent of the total resources spent on labour market policy were used on active measures (*Table II:2*).

The program for active labour market policy includes mainly four different measures: start-up loans, intervention works, public works and training and re-training.

- An unemployed, which has a viable plan to create his/her own place of work, can get a loan which amount to a maximum of 20 times the average wage. If the place still exist after 2 years, 50 percent of the loan can be forgiven.
- A wage subsidy (intervention work) for additional places of work for an unemployed can be given as long as no substitution of current workers occurs.
- With co-financing from municipal authorities, the labour offices can provide public works for long-term unemployed with small prospects of finding a permanent job.
- The labour office can also direct an unemployed to training courses of varying length (usually up to 3 months).

Initially, the emphasis was put on start-up loans⁷ but lately intervention and public works have taken over most of the attention. In 1995, intervention and public works amounted to 80 percent of the total budget spent on active labour market policy. Intervention works dominate among these two types of measures.

Since October 1990, all unemployed with 180 days of work within the last 12 months are entitled to unemployment benefits. Initially, the benefit was earnings-related, but since December 1991 the unemployment benefits are equalled to 36 percent of the average wage in the previous quarter for all unemployed, irrespective of their previous income. In December 1991, a maximum length of unemployment benefits was set to 12 months and also the possibilities to reject a job offer were tightened. Some exceptions regarding specific categories of unemployed occur. In 1996, around 50 percent of all registered unemployed was entitled to benefits.

Table II:2 <i>Labour Market Policy Measures in Poland 1992-1996</i>					
	1992	1993	1994	1995	1996
Total expenditures (percent of GDP)	2.0	2.18	2.12	2.16	2.07
<i>Passive and Active Measures in Percentage of Total Expenditures</i>					
	100.0	100.0	100.0	100.0	100.0
Unemployment benefits	86.3	83.9	83.8	84.7	85.2
Active measures	4.7	11.1	12.8	11.4	10.7
<i>of which:</i>					
<i>Intervention works</i>	2.1	4.3	5.5	5.1	
<i>Public works</i>	0.8	3.8	4.7	4.1	
<i>Start-up loans</i>	1.0	1.7	1.2	1.1	
<i>Training</i>	0.8	1.4	1.3	1.2	
Residual	9.0	5.0	3.4	3.4	4.1
<i>(basically apprenticeships)</i>					

Source: Ministry of Labour and Social Affairs

The active and passive labour market policy are financed through the Labour Fund, which is financed by pay-roll taxes, 35 percent, and from the state budget, 65 percent.

⁷ The ILO project was much geared at introducing this measure.

3. *Wage Structure and Poverty*

The transition has resulted in decreasing real incomes and increasing incidence of poverty. This downward trend actually started as early as 1987, but it accelerated in the early 1990s. Since 1994, the deterioration stopped and the situation started to slowly improve. Some increase in wage inequality, measured as the gini-coefficient has occurred during the transition, but the large change in inequality is between persons outside and inside the labour market. Poverty is often associated with unemployment.

The rise in wage inequality results largely from changes at the top rather than at the bottom of the wage distribution.⁸ Thus, the incidence of poverty among the working population is not a result of increasing inequality, instead it is caused by the fall in real wages. Poverty among the working population is shallow and as the real wages catch up, the situation will certainly improve.

As a result of the transition, the Polish wage structure has become more similar to wage structures within the OECD. The wage position for white-collar and private sector workers has improved. The wage premium for education and wage differences within different occupations and branches have increased. The wage premium for age and experience seems to have declined and that is supported by the anecdotal evidence that the winners on the labour market is the young and that experience from the pre-transition period has been depreciated.⁹

Despite the socialist rhetoric, the difference in wages between men and women was large during the old regime. During the transition the wage-gap has somewhat decreased, but still in 1994 the average wage for a full-time employed woman was only 77 percent of the average male wage.¹⁰

4. *Further Development of Labour Market Policies*

The high unemployment rate is regarded as the largest problem in Poland by the population. Even now, after 5 years of continuous high growth, the unemployment rate has only slowly started to fall. The number of long-term unemployed is increasing. The scope for increasing efforts to develop the Polish labour market policy is thus large. Efforts to monitor the registered unemployed have lately been emphasised, but also an increasing emphasis on active measures have been stressed. The main obstacle to a further change towards active measures is financial. Unemployment benefits are less expensive than training and job-creation programs.

⁸ Rutkowski, J. (1996)

⁹ Rutkowski, J. (1996)

¹⁰ Kowalska (1996)

III The AMS Project: Development of Labour Market Institutions

General Assessment: Professionally delivered and received

The project has been professionally delivered and the Polish side has shown good capability of applying Swedish solutions and ideas to their own reality. All participants appear to have understood and, as far as external circumstances have admitted, they have implemented at least two of the main objectives stated in the project: Separation of the placement and vocational guidance services from the payment of benefit services and the development of contacts with employers.

At the model offices the effects are comprehensive and more visible, in particular in Lodz. Organisational changes in the management of the offices have been sustainable. It is clear that management by objectives has been introduced. That the projects have been sustainable is further stressed by persisting effects in Torun, a main recipient in the previous AMS-project in 1991-1993. It may also be noted that the focus on services to employers in the training has increased the number of vacancies, i.e. the measures have had real effects on the functioning of local labour markets.

Diffusion to other regions or offices within a region could be improved. However, this responsibility lies mainly on the Polish side. Apparently, some infusion is still needed from the Swedish side, as expressed by a new project proposal where similar project activities as in this project are proposed for five new counties - *voivodship*.

1. *The Institutional Setting*

The organisation of public employment service in Poland is centralised since the establishment of the National Labour Office (NLO) in 1993. The voivodship labour offices (VLO) are subordinated to the NLO. There are 49 VLOs in Poland and about 5-10 local labour offices (LLOs) in each voivodship.

The activities of the VLOs and LLOs are financed by the Labour Fund. In addition, the voivodship may add some funds to the VLOs and LLOs. The labour fund is primarily financed from the budget, about two-thirds, and to about one-third by a pay-roll tax (see section II above).

The NLO is an agency under the Ministry of Labour, but it has considerable independence. However, the Ministry of Labour controls the over-all priorities in labour market policies and international co-operation.

In addition to these agencies, there are employment councils at all three levels of management. These are advisory boards with representatives from trade unions, employers organisations, local governments, and the central administration.¹

In addition to the public employment service, there are private employment services. These specialise in recruitment to highly specialised professions.

¹ Kabaj (1995)

2. **Project Objectives**

According to the project plan the agreed activities of the project were the following:

- A. Three seminars for managers from Polish Local Labour Offices (LLO) in Gothenburg and Karlskrona in August and October 1994.
- B. Seminar for trainers in Gothenburg, November 1995.
- C. Six training sessions for LLO personnel in Poland, September 1994-July 1995.
- D. Four consultation periods in the LLOs in Nowy Dwor and Lodz September 1994-May 1995.
- E. Evaluation seminar October 1995.

Seminars in Sweden for managers of Polish LLOs (A)

The aim of these seminars were to train 36 managers from 7 different voivodships in *management by objectives*. This means that work is organised according to plans where each department has concrete goals to achieve. The management includes planning of activities, stating of goals, budgeting and evaluation. A second goal of these seminars were to infuse organisational change in the LLOs regarding *the separation of placement service and vocational guidance from the payment of benefits service* which is provided by the Polish LLOs. According to the final report, 36 managers from the voivodships of Gdansk, Warsaw, Lodz, Bydgoszcz, Elblag, Torun and Katowice took part in these activities.

Seminar in Sweden for trainers (B)

The aim of the seminar was to train 14 trainers from the LLOs and 2 from the NLO in special placement service to persons with special difficulties (e.g. disabled) in finding jobs.

Training of officers (C)

The purposes of the six training sessions were to:

- Differentiate placement and vocational guidance services from the payment of benefits
- Develop services to employers in order to increase the inflow of vacancies and make matching more efficient
- Develop the methods for serving groups of unemployed
- Introduce vocational guidance as a basic service to the unemployed.

Consultations to the model offices (D)

The project involved special consultations to two LLOs, one in Lodz and the second in Nowy Dwor in the Warsaw voivodship. The goals of these consultations were to:

- Introduce management by objectives, i.e. management through work plans with concrete goals for all staff, budgets attached to these, and evaluation made by management.
- Separate of placement and vocational guidance services from the payment of benefits services.
- Introduce vocational guidance as a basic service to the unemployed
- Develop methods for working with groups of unemployed
- Develop the services to the employers

- Develop techniques to handle vacancies

3. *Project Results*

The extensive final report provided by AMS and NLO² shows that all planned activities have been undertaken in an ambitious and highly qualified way. The interviews made during the field mission in Poland by the evaluation team confirm that the Polish participants have been satisfied with the project and to a large degree, the know-how provided has been implemented in the daily work of the LLOs. Two elements that all participants have mentioned during the interviews and which appears to have been put into practice are:

- Separation of placement services from the payment of benefit services
- More time devoted to employers in order to increase the number of vacancies

Of course, the most visual effects have been achieved in the two model offices where the Swedish consultants were able to work on a broad agenda of issues necessary to change the organisation and approach to employment services.

Lodz

In particular, the Lodz LLO has succeeded in implementing the organisational changes discussed during the consultations with the two Swedish experts, Ms Britta Tener and Ms Gerd Olofsson. The enthusiastic manager, Mr Jan Wisniewski, appears to have squeezed out the most of all impulses and ideas that emerged during the consultations. He stressed the concrete and practical nature of the co-operation with the Swedish side, apparently this is one of the keys to why the co-operation has been fruitful and shows evident results.

He compared this to co-operations with some other countries. At one instant he had been compelled to ask consultants to leave, since they did not provide any substantial assistance, only a lot of extra work for himself and his staff.

The local labour office has got a new building with plenty of space for the services. The separation of passive and active measures was very clear. Passive measures, i.e. registration, benefit calculation, and social services, took place on the ground floor, and active measures, i.e. placement and vocational guidance, work with the employers, vacancies, and special departments for intervention works, public works and loans, on the first floor. We made a study tour of the labour office which took about 2 hours during which we got detailed descriptions of each department and function by the staff. The organisation of the active part is very similar to that in Swedish employment services.

The director obviously had delegated management in a clear and functional way to his subordinates. This was shown explicitly during our visit when each deputy and each specialist showed and told us about their responsibilities. Also, the work with the employers had had concrete effects. More vacancies were reported to the LLO, and employers were satisfied with the services of the office.

Mr Wisniewski and his young deputies expressed wishes for some follow-up of the Swedish contacts. Our impression is that a rather small effort from the Swedish party could create big additional effects in this office. For instance, a 1-2 days consulting visit in connection with projects in other voivodships for discussions of not resolved issues could be of great value to the office. Particularly they mentioned analyses and forecasts of the local labour market as a theme which they would be interested to develop.

² AMS & NLO (1995)

Nowy Dwor

The Nowy Dwor office is a much smaller office than the Lodz LLO. The effects here of the Swedish impact was not as visible as in Lodz. However, basic changes as the separation of placement and benefit services, and the establishment of the different sub-departments for different forms active labour market policies had been undertaken.

The focus on employers was very high and to some extent it appeared that the labour office saw its role more as a service to the employers "recruiting" the right person to a specific vacancy, than as a service to the unemployed. The active work with employers had had the effect that more vacancies flew into the LLO, even from outside the Nowy Dwor district.

Also, the services to the unemployed had been changed. Earlier placement services had been divided according to the education of the unemployed, now it was divided according to branches of industry.

We asked about if and how experiences from this office had been diffused to other LLOs in the Warsaw area. Ms Heda, the director, told us that they had participated in some seminars which aimed at diffusing the experience. At a later interview with the director of the Warsaw VLO, Ms Zalewska, we were told that as a result of a series of meetings where the Nowy Dwor experience had been discussed, two offices in the Warsaw region had applied the separation of placement and benefit payment services. One office had created a special department for working with employers.

The Nowy Dwor office wanted to have follow-up assistance, and the director, like her colleague in Lodz, specially mentioned consultations on how to make analyses and forecasts of the regional labour market. The office had been shown as a model office for groups of LLOs of other voivodships and for a group of Lithuanian employment service officers.

Gdansk

In Gdansk the director of the VLO, Ms Zielinska, was pre-occupied with the 2000 unemployed resulting from the shut-down of the ship-yard, and this topic dominated the interview. However, she claimed that the Swedish contributions had had considerable effects, in particular when taking into account impulses from the Swedish experts already in the ILO project, and that Swedish efforts were the first bilateral project in this field. In particular, the influence consisted of the stress put on active measures.

Ms Zielinska did not agree on that Gdansk had been especially privileged in getting technical assistance. Apart from the ILO project and the Swedish efforts, they had had assistance from the US Ministry of Labour. The latter had helped in setting up job centres, which are centres not only assisting the unemployed in their search for jobs, but also providing other services such as assistance with contacts with the local administration and social services (e.g. children's day care). American assistance was also geared at creating services for temporary employment for special groups, e.g. women. The latter was a non-governmental initiative standing outside the VLO. Women make up 65 percent of the registered unemployment in Gdansk.

One of the LLO managers, Ms Mliczek, having taken part in the management seminars of the Swedish project said she had been able to apply several of the ideas presented in Sweden: Management by objectives, organisational changes involving management, the planning of work, services to clients and employers. Two years ago, they had separated the LLO's placement and payment of benefit functions. She also mentioned that some work had been initiated on special services for the disabled.

We also visited the Gdansk VLO training centre where some of AMS' courses had been held. The centre is well equipped and provides a nice atmosphere for giving courses. In particular, the ILO has used the centre for courses and seminars. But other countries, e.g. Holland, USA, and the UK had, like the Swedes, used the premises.

In 1995, the centre had organised a couple of courses for participants from the Baltic states. The courses had been financed by the US Department of Labour and the trainers had come from the US and Poland. Both the Director of the Centre and Ms Zielinska expressed hopes of initiatives to similar courses with Swedish financing and Swedish experts. They both claimed that the Polish experience was highly relevant for the Baltic states and that the training costs were lower when the courses were held in Gdansk than in Sweden or the US.

The VLO has some contacts with their counterparts in the Kalingrad area. The voivodship of Gdansk is engaged in a sister project with Kalmar which among other things involves training of managers in the administration. They had made an application to the European Commission for funding.

Torun

Torun, together with Katowice, were the main recipients of the first AMS and Amu projects 1991-1993. In the project 1994-1995, only a few persons took part in project activities.

It was clear that the effects of the project still persist. Most of the people who had taken part still worked in the labour office. The effects of the Swedish project were clearly sustainable, first of all because the Swedish project was one of the first. Also the enthusiasm of the Swedish experts was mentioned as an important element. Later Torun had taken part in projects with Germany and the USA.

Changes like those in Nowy Dwor had taken place. There is a high consciousness and willingness to develop the services further. Key elements as "orientation towards the clients", "step-wise change", and "our role in society" have been prominent elements in the co-operation.

The LLO has close co-operation with the ZDZ in Torun (see below, section IV).

4. Cost Efficiency

The costs of the project activities are depicted in *Table III:1*. Due to the time which has passed since the conclusion of the project, we could not get a more detailed specification of costs for each project activity. However, seminars have been of equal length, one working week each, and consultations to the model offices were delivered four times between September 1994 and May 1995, by one week at each office each time. Thus, we may look at the total average cost per directly involved participant, which is around 11 000 SEK, which could be considered reasonable.³ As usual, activities which have taken place in Sweden are more expensive than those in Poland.

The consultants say that in connection with the consultations to the model offices several seminars were held to which many participants were invited. Thus, more persons may have been involved on a casual basis. Particularly in Lodz, lectures and seminars took place to which officers from other LLOs were invited, and the consultants estimate that at around 40-50 persons were reached this way. Of course, the whole staff at the model offices

³ This is in line with the average costs per participants in the AMS projects in Russia. See Oxenstierna & Pihlgren (1997).

may have been involved in the activities in some way, and these were 24 in Nowy Dwor, and 118 in Lodz.

AMS-project (BITS 940314, POL0062) 2.4 million SEK

Table III:1 Costs of activities of the AMS- project 1994-1995			
<i>Activity</i>	<i>Number of persons directly involved</i>	<i>Total cost (SEK)</i>	<i>Cost/ person</i>
A. Seminars for managers	36	542 301	15 064
Seminar 1 in Gothenburg	12		
Seminar 2 in Gothenburg	12		
Seminar in Karlskrona	12		
B. Seminar for trainers in Gothenburg	16	191 080	11 943
C. Training of officers (6 sessions)	118	641 280	5 435
D. Consultations to the model offices			
Nowy Dvor	15	188 080	12 539
Lodz	20(40-50)	188 080	9 404
E. Evaluation seminar	9	30 524	3 393
F. Project management & final report		578 655	
Total	214	2 360 000	11 029

If we look at a break down of the total figures, we find that almost half of the budget has been used for direct costs - travel, accommodation, etc. - and 28 percent for remuneration of experts (*Table III:2*). The internal administration accounts for a fourth of total costs which may be considered reasonable. The share is, however, much higher than in Amu's project.⁴

Table III:2 Break-down of Costs in the AMS-project 1994-1995				
	<i>Total</i>	<i>Remuneration</i>	<i>Administration</i>	<i>Direct</i>
<i>SEK</i>	2 360 000	672 000	610 000	1 078 000
<i>Percent</i>	100	28	26	46

5. Co-operation with Other Countries

The World Bank Project mentioned in the previous Sida evaluation⁵ is now in its final stage. The project should have been finished in 1996, but because of delays the last part of the installation of hard ware at LLOs is still not finished.

The International Department at the Ministry of Labour expressed the need for continued bilateral co-operation. We were told that the knowledge of what was needed had developed significantly since the beginning of the 1990s. Then projects like the 80 million USD World Bank project was given priority and deemed extremely important. Now, however, there was more consciousness about the need for specialised and well directed know-how.

The NLO has a quite vital co-operation with other countries. Presently the most serious co-operation is with Germany, USA, Denmark, UK, and France. Occasional seminars

⁴ The internal costs are somewhat lower than in the Russian projects, where AMS internal costs were 29-35 percent.

⁵ Swedish International Services (1993)

have been arranged with Spain, Belgium and Italy. In addition, co-operation has started with other transition economies.⁶

Germany

The co-operation with Germany during the later years involved the development of a net-work of centres for vocational guidance in Gdansk, Torn, Warsaw, Lodz, Rzeszow, Lublin, Katowice and Wroclaw. The next step in this project will be the establishment of such a centre in Szczecin. The co-operation has also involved development of information net-works to fight illegal employment. In addition, there is a program offering unemployed Poles seasonal work in Germany, and a program for students. These programs have been developed in co-operation with the Bureau of Migration within NLO.

France

France has established a training centre in Warsaw where they arrange courses and seminars for Polish labour office employees. A principal idea in these efforts is that trainees at seminars should be able to take part in training of new groups of Polish specialists in order to speed up the diffusion of the new know-how.

Denmark

During 1996, Denmark had a large program on the development of the local labour offices. Four parallel projects were carried out in the regions, particularly focusing on job creation and developing vocational guidance techniques.

UK

Several projects have taken place on placement issues with the NLO in Warsaw. In addition, there is a special program of co-operation between the University of Hull and Torun which aims at establishing an office for promoting students from higher education in the voivodship of Torun. Training of one group of unemployed students will be financed by the English party.

Transition economies

Co-operation with other transition economies has started. Specifically such co-operation is developed with Lithuania, Ukraine and Belarus. Support for the development of this co-operation is welcome from Western countries, for instance, in the form of organising joint seminars as has been done in Gdansk.

6. Continued Co-operation

There is a draft proposal on further co-operation according to which a similar one year project should be undertaken with participants from 5 new voivodships - Slupsk, Koszalin, Szczecin, Gorzow and Pila. These voivodships are in the north-west of Poland, and have an unemployment rate of around 18-25 percent.⁷

The new draft proposal

The objectives of the new draft proposal is to:

⁶ And the rest of this subsection, *Biuletyn Informacyjny Krajowego Urzedu Pracy* (1996) & (1997). *Rynek Pracy* (1997)

⁷ Registered unemployed. Ministry of Labour (1996).

- Develop management within the labour market organisation in particular at the NLO and the VLO level
- Develop the LLOs from an organisational point of view and establish responsibility areas regarding reception service, placement, information service, counselling, and financial matters
- Develop working methods for the above mentioned services (except financial matters).

From the results of the previous projects shown in this report, AMS appears to be well apt at continuing according to these lines. The inclusion of management development at the NLO and VLO level, which has not been so elaborated previously, is of relevance.

It appears that the region for continued co-operation is well chosen because unemployment problems are significant here, and at least some of the counties are in relative proximity of Sweden, which means the efforts might be strengthened by other Swedish presence in form of assistance or business co-operation in other fields.

What may be questioned is whether the effects of concentrating only on seminars will be effective. As has been discussed above, visible sustainable effects of the Swedish efforts are particularly seen at the model offices in Lodz and Nowy Dwor, and in Torun, where the Swedish consultants were able to work on a broad range of issues and the assistance has been given over a longer period. The building up of confidence which is a prerequisite for successful transfer of knowledge takes time.

We believe that effects are strengthened when contacts are pertained between the Polish participants and the Swedish consultants also after a concrete project has been concluded. Therefore we would recommend two additions to the proposal:

- Follow-ups at least with the two model offices and maybe Torun. The model offices have asked for additional help, in particular with analyses and forecasts of the local labour market. Some consultation in this area (as well as others) could be done in connection with Swedish experts travelling to Poland in connection with seminars.
- Inclusion of former Polish participants in the Swedish activities as trainers in the planned seminars. For instance, somebody could be invited to tell how they had applied the Swedish solutions in their offices, and also about the problems in this adaptation process. The model offices, particular the one in Lodz, could perhaps be shown to participants in the new program.

Complementary to other donors' efforts

The proposal includes a section describing the content of the *Employment Promotion and Services Project* financed by a World Bank loan and the Polish side, and also a detailed description of its component "Development of Employment Services". As far as we understood, this project is under conclusion during 1997. In addition, as AMS argues, the new project covers quite different aspects of labour office development than the World Bank project. In fact, the AMS project covers much more detailed and organisational technical matters than the World Bank project. Therefore, we agree that there is no duplication of efforts, but rather complementary, and it will be important that assistance at the local level continues after the broader and more general components of the World Bank project have been concluded.

As have been shown above, the NLO has a wide range of bilateral co-operations with different countries. Since the NLO controls the choice of regions where the assistance is given by different donors, we do not find large risks of duplication here either. However, since employment service infrastructure differs between Western countries, it is important to

involve the central and regional leadership in the Swedish training, in order to avoid contradictions in the development of Polish labour administration. For that reason, the special component in the new project directed towards the management of the NLO and VLOs is of great importance.

Initiatives to unify the system

We also believe that it would be relevant to initiate conferences for the exchange of experiences between LLO staff in the voivodships having had different donor assistance. Different countries have different technical solutions to concrete problems, and it does not seem the NLO has a comprehensive picture of the disparities which could cause disturbances in the future. Now assistance could be given by any country in different places, and nobody bothers about differences in approaches and solutions. Therefore initiatives geared at streamlining and unifying the organisational and administrative system for Polish employment service activities would be of great relevance.

IV The Amu Project: Labour Training

General Assessment: High competence on both sides and concrete results

The receiving party is highly competent and has used the impulses gained in the co-operation in a maximum way. To a large degree this is explained by the fact that the Amu counterparts, ZDZ-institutes and schools, are vocational training institutions with long traditions and have a staff with high qualifications. Also, the unique competence of the Amu project manager, Alina Maric, has had great impact on the successful results, since she is not only an expert in training of adults, but she also knows the language and has good competence in both the Swedish and Polish cultures and realities.

ZDZ appears to be a strong organisation, and the parts which were reviewed by the team appears to have adapted quite well, from their previous more or less monopolistic position in the market for vocational training, to the competition today. Some ZDZ-institutes which are strong might be in the position to finance their further co-operation with Amu themselves. Others, however, have a difficult financial situation, and need assistance financing.¹ If further projects are financed by Sida, participants from earlier projects might be included as trainers in order to strengthen the multiplier effect and develop the internal training within the Polish organisation..

The modular training approach proposed by Amu and the ILO has gained way. The six modular training programs developed during the project with Amu are used all over Poland and the ZZDZ supports the further development of such a training program approach.

The management training has resulted in a marked increase in the understanding for the necessity of marketing training services and fit the training to the needs of the labour market and the jobs available.

1. The Institutional Setting

ZDZ

In Poland the market for vocational training is dominated by the old vocational training establishment ZDZ.² At least, this is true for blue collar professions. The ZDZs all over Poland are members of the Union of Vocational Education Centres - ZZDZ. This is an educational association acting on the basis of an Association Act.

The main statutory objective of ZZDZ is to participate in the national education programme regarding vocational development of the workers. This objective is carried out by ZZDZ in close co-operation with the 29 centres organised in the Union. The centres cover the whole territory of Poland with a network of 350 vocational centres, 224 post grammar schools and 108 workshops. The organisation also includes 6 training companies, 10 job placement agencies, and the Silesian management college in Katowice.³

Changing prerequisites

The changes during the 1990s have been dramatic for the ZDZs. They have lost over half of their students. In 1987, 700 000 persons were trained per year, in 1994 the

¹ This is according to the former ZZDZ president Andrzej Pilat and Alina Maric.

² This is different from the situation in Russia, where many new institutions compete in the area. See Oxenstierna & Pihlgren (1997).

³ Krotko o ZZDZ

number was 300 000. Since then a slight recovery may be noticed. In 1996, 327 000 persons were reported to have been trained.⁴

Public bidding

Apart from the ZDZ, there are other training institutions providing training to the unemployed. Since 1995, the labour offices are compelled to undertake a public bidding for every course they demand. The ZDZs which have been subject to training with Amu, seems to be quite well equipped to compete in this way. Some new institutes compete with low prices which the ZDZ cannot underbid. But on the other hand they can compete with quality, and the LLOs are learning to appreciate that. The ultimate criteria is the proportion getting jobs after training, and it is high for the ZDZ courses, around 70 percent.

The big share of adult students are not the unemployed directed to the ZDZs by the labour offices, but adults seeking retraining themselves or they are sent by their employers. All adult training at the ZDZ is paid for by the participants (or by their employers, or by the LLOs). The ZDZ does not receive any budget funds for these activities. Another important part of the ZDZ revenues are the products produced by the students during their training which are sold.

In the voivodships the team visited, ZDZ got around 50 percent of the unemployed directed to retraining. In the country as whole they get around 30 percent, today about 25 000 persons. In order to compete better on the market, ZDZ now develops new courses particularly in administrative and economic skills. The co-operation with Amu is part of this development.

Apart from the training courses for adults, the ZDZ runs vocational training schools for youth. This training is usually three years. In the past, this training was seen as part of the school system and financed either from the central budget or by state enterprises the schools were directly adjoined to.⁵ Now, however, even this training is to a major part financed by the trainees themselves.

2. *Project Objectives*

The agreement between the two parties contains the following components:

1. A kick off conference in Slupsk for all participants in the project
2. Elaboration of curricula in the administrative area
3. Training sessions and seminars for managers at the ZDZ in Szczecin, Slupsk, Bialystok, and the ZZDZ

Kick-off seminar

The objective with this seminar was to introduce all the participants to the results of the old project thereby linking the projects and getting a continuous co-operation. Also, the work schedule was finalised in detail. An important change from the original plans was the inclusion of six representatives from the LLOs in the three regions in question in the study tour to Sweden. This was done to improve the understanding of the LLOs of the new work approaches of the ZDZ and relations in general.

Elaboration of curricula

The overall objective of this part of the project was to introduce and develop the cost effective modular curricula system in the Polish vocational labour market training system.

⁴ Interview at ZZDZ

⁵ According to the Amu consultant, the training resembles what was done in the old Swedish vocational training schools.

The basic idea, and advantage, with modular curricula is that a person does not need to go through a comprehensive education, but the training is tailor-made to suit the person's individual needs. The jobs provided on the labour market indicate what kind of abilities must be developed. Thus, before you start looking at the job seeker's *competence profile* you must analyse the labour market situation - which jobs are available, which abilities are demanded or may be demanded in the near future. It follows that the idea with modular training is to train persons in a cost efficient way and make them "fit" to the labour market as fast as possible again. The method is well known internationally and it is backed and diffused by the ILO⁶.

The work schedule used in this part of the project included three *co-ordination meetings*, one *study visit to Sweden*, and an *implementation phase* when the Swedish experts have made several travels to the identified regions and also supported the Polish counterparts by tele-communications.

The first co-ordination meeting took place in Warsaw in August 1994, and at this meeting a priority list of the most important fields within the administrative area was put together. It was also decided which region would elaborate which curricula.

The study visit to Sweden took place in September-October 1994. A total of 24 participants took part, of these 15 were from the ZDZ in the three regions, 6 from the LLOs and 2 from ZZDZ.

The purposes of the study visit were to:

1. See the modular system in real life
2. Study how modules are elaborated
3. Study the quality assurance and distribution system of Amu
4. Study the modular system from the buyer's point of view

Two more co-ordination meetings took place, the first in direct connection with the study visit. During this one it was decided that Szczecin was to elaborate curricula for *accounting assistants with computer knowledge* and for *computer network architects*. Slupsk was to elaborate curricula for *office services* and *chief assistants*. Bialystok would elaborate curricula for two *economy assistant* functions. The third co-ordination meeting took place in December 1994, when the drafts of the curricula were discussed. It was decided that implementation should start in January 1995.

The implementation started with pilot courses for around 20 persons in all the regions during spring 1995.

The final report provided by Amu and ZZDZ⁷ shows that the Polish participants highly appreciated the seminar in Sweden. The start of the implementation already in spring 1995 also shows that the training had been effective. This was confirmed during the field mission of the evaluation team (see below).

Training sessions for managers

The objective of this part of the project was to introduce steering and monitoring approaches in different areas of management - personnel policy, financial monitoring, and marketing. Also, the project aimed at creating a network between regions to promote a further development within ZDZ on these issues.

This part of the project consisted of two seminars one in Bialystok and the other in Sweden.

⁶ International Labour Organisation.

⁷ AmuInternational *et al.* (1995)

At the seminar in Bialystok 6 district directors and heads of the vocational training centres and 2 persons from ZZDZ participated. The main component in the seminar was the introduction to modern management and management theories.

The seminar in Sweden took place in Uppsala, and the same 8 participants took part. At this seminar, the main components were different models for management, organisation development, group and organisation theories for vocational training institutes, marketing of services, quality control, etc.

The seminar was very positively evaluated by the participants, and especially the marketing issues, sales and negotiation techniques have been appreciated and implemented. ZZDZ wants to diffuse the knowledge within the whole organisation of ZDZs.

3. *Project Results*

As far as we could see all activities had been undertaken successfully. The main reasons for good achievements appears to be:

- A competent receiver, especially in Slupsk and Bialystok.
- Highly qualified Swedish consultants. In particular, Alina Maric, who knows the Polish language, the Swedish and Polish cultures, and who is an expert in the field, was mentioned by the Polish participants..

Szczecin

In Szczecin ZDZ resides in a big school building from the 1930s. Originally this was a German vocational school. The establishment is well known by locals. The ZDZ in Szczecin was established already in 1946. After the war, there was a great need of craftsmen and it was important to quickly give those returning from the war skills. In the voivodship there are 4 such schools.

During the social period, the school had provided vocational training for youth, and skill-upgrading for employees in local industries. In those times, the school received about 30 000 students per year. Today the amount is only 12 000-13 000 persons. Of these 2000 are unemployed persons directed to the ZDZ from the local labour offices. The drop in the amount of students had, of course, affected the establishment. For instance, the staff had had to be cut, now only 25-30 full time teachers are employed, although they have access to some hundred others through the central ZDZ register.

The establishment needed to reform completely, since they were now forced to compete on the market with other institutions offering vocational training. Today there are 170 training suppliers in the area, of these, 7-10 were highly qualified. Yet, even the less qualified institutes represented competition, since they offered courses at too low prices. Thanks to high standards of the training, the ZDZ still has a large part of the numbers of unemployed getting training. Of the total, 4000 last year, they trained 50 percent.

The Szczecin ZDZ primarily train auto mechanics, welders, and other blue-collar workers. However, the school management said they could provide training for 100 different professions. The competence they lacked was language training. Of those having been trained, around 70 percent got jobs.

The persons taking part in the Amu project were especially satisfied with:

- That the leadership of ZZDZ had been present at the first management seminars. Thereby, they understood the importance and relevance of the co-operation, and supported it.
- The co-operation with Bialystok and Slupsk.
- The high competence of the Swedish consultants

Six modular training programs were now available in the ZDZ system. The Szczecin ZDZ had developed two modular courses, computer based accounting and network operators. The first course was used as a separate course, and the second one was one component in a computer course.

Slupsk

In Slupsk we met three representatives of the local ZDZ, who appeared competent and interested in their work. We were shown the simulation firm that they had set up in order to train persons in different office functions. Also, we were taken to a more centrally located building, which the ZDZ had bought to run administrative courses for paying students or unemployed. It was obvious that the managers of the ZDZ had fully understood the importance of making training attractive. The building was renovated and well equipped. Its location, nice rooms, and a planned café was considered as important as competent staff and relevant courses in the competition for students.

Slupsk is one of the regions with the highest rate of unemployment, around 25 percent.⁸ This is basically due to job destruction in the state farms. In the voivoidship, there are 50 000 registered unemployed. Of these, 20 000 were in the region of this Slupsk department of the ZDZ. During the last year about 2000 persons among the unemployed had been trained and of these 1000 had been trained by the ZDZ centre.

The representatives of the Slupsk ZDZ expressed wishes of further co-operation with Amu. They were especially interested in developing modular courses for training of construction workers.

Bialystok

The persons who had taken part in the co-operation with Amu appeared competent and had used every opportunity to use the experiences from the Amu co-operation. They found, first of all, that they had learnt a lot from seeing how Amu functions, how Amu uses new techniques and the general philosophy behind the activities. Secondly, they found the development of new course plans useful.

They were very proud of the simulation firm they had developed and also of a simulation construction site they were developing. They had also started to develop multimedia programs using the Swedish experience as a starting point.

The ZDZ in Bialystok is much geared at short-term courses for the unemployed. Also, the labour office has actively taken part in the development of courses. The co-operation with Amu has affected the types of courses that are given. Previously they focused on blue-collar jobs, now they were expanding in white-collar occupations. The new courses make up 30 percent of the total course program, and are largely according to the modular approach. This is seen as an important element in the competition with other training institutions. In Bialystok there are 70 other training institutes offering courses. The marketing skills learnt in the co-operation with Amu were considered of great importance.

Of the total courses supplied by the ZDZ in Bialystok, 12 percent were for the unemployed.

Torun

Torun took part in the first project, 1991-1993. The Swedish consultants spent 30 weeks in Torun. The project basically had three elements: a course in hotel and restaurant services, a computer training course and a course on how to search for a job. The first two of

⁸ Interview with Pilat. Other high unemployment regions are Koszalin and Suwalki

these courses are now part of the ordinary course program. The job seeking course was given only once⁹ in 1992. The labour office thought it was too expensive and therefore a vocational guidance position was instead established at the ZDZ.

Most of the training arranged by the ZDZ in Torun are ordinary vocational training which runs over 2-3 years. Even the courses developed with Amu are such. Training demanded by the LLOs are usually not longer than 3-6 months. It follows that the modular approach has not been applied to any significant extent. Also employers appears to prefer job seekers who have passed a traditional vocational training giving them a certificate over specially designed modular courses. Therefore courses bought by the LLO were not modular to any significant degree.

Today the LLOs buy 35-40 percent of all labour market training from the ZDZ. In 1996, this amounted to courses for 200-300 persons. As in other places, the advantage of ZDZ over other training suppliers is that they are well organised and equipped, and provide courses of high standard. The ZDZ specialises in training for the local industries, especially in electronics and the production of pumps. This is now complemented by courses in tourism and restaurant services. This also means that the previous domination of training in male-professions has been modified. The new courses are largely directed to women.

The representatives of the ZDZ highly appreciated the training they had got through Amu. The fact that many of the ideas, e.g. the modular training concept, had not been implemented to any significant degree, may be explained by local constraints, and by this being the first contact with Western vocational and labour market training. Thus, the readiness and competence in understanding and diffusing new ideas was not as developed as now. At the ZDZ the project in Torun is considered as an important prerequisite for opening the door for the second project.

The Torun ZDZ develops a project on ecological tourism financed by PHARE.

4. *Cost Efficiency*

It was difficult to obtain exactly the cost data we wanted from Amu because of the time that has elapsed since the conclusion of the project. The data we could obtain are depicted in *Table IV:1*. First, we may notice that the project has been cheaper than planned.

Amu-project (BITS 940506, POL0063, 1.8 million SEK)

<i>Activity</i>	<i>Number of persons directly involved</i>	<i>Total costs (SEK)</i>	<i>Cost/person</i>
Kick-off seminar in Slupsk	18	96 000	5 333
Elaboration of curricula			
Study visit to Sweden	24	364 101	15 170
Implementation of results	40 (-50)	532 300	13 308
Training of managers	24	211 375	8 807
Seminar in Bialystok	16		
Seminar i Sweden	8		
Coordination meetings & project management	2*14	195 824	
Total	158	1 399 600	8 858

Of a total budget of 1.8 million SEK, 1.4 million SEK was used, or 77 percent of the budgeted means. The main reason for this result is a considerable economising on accommodation costs

⁹ Twice according to a comment from the Amu consultant.

during the curricula seminar in September 1994 in Sweden (about 150 000 SEK). Another factor is that a planned installation of computer equipment has not taken place (economies of 60 000 SEK). Finally, international travel has been done at lower costs than planned (minus 80 000).

Regarding the exact costs of each activity, we could not get the detailed breakdown we demanded. However, we find that for the activities which have been specified costs per person are in line with what is normal in other similar activities in similar projects. Costs for one-week long seminars in Poland are around 5000 SEK per participant, cost per participant of a week-long seminar in Sweden is around 15 000. Looking at the total cost and the total number of participants given to us by Amu, we find that average cost per participant is around 8000-9000 SEK.

Amu was not able to specify costs for project management and the coordination meetings separately. This means that the whole remuneration part (consultancy fee) of these activities has been attributed to administration in *Table IV:2*. Still, the over-head cost is much lower than in the AMS project (see *Table III:2*). The proportions of remuneration, administration, and direct costs in total costs are very similar to that in other Amu projects,¹⁰ administration being slightly higher which is due to the problem of separating the pure project management /administration component in the sum reported.

Table IV:2 Break-down of Costs in the Amu-project 1994-1995				
	<i>Total</i>	<i>Remuneration</i>	<i>Administration</i>	<i>Direct</i>
<i>SEK</i>	1 399 600	820 000	179 000	400 600
<i>Percent</i>	100	58	13	29

Thus, the cost-efficiency of the project may be considered reasonable. Amu has been able to economise substantially on direct costs, and keeps administration at a low level.

5. Other International Co-operation

The ZZDZ has a plan for ZDZ's international co-operation. Apart from Amu, they co-operate with similar organisations in Germany, France, and Austria. Within the vocational training part of the World Bank project, training institutes were invited to bid for funding for the development of courses in new areas. ZDZ won 60 percent of these biddings.

The ZZDZ would like to start co-operation with Ukraine, Belarus and Lithuania. Cultural differences between the countries are small and therefore, according to the ZZDZ representatives, many of the mistakes which had been experienced with Western countries could be avoided.

6. Continued Co-operation

There is a proposition of continued co-operation focusing on management questions. The project proposal describes two major components

- Training of managers from four identified regions - Warsaw, Krakow, Lodz and Poznan.
- Elaboration of a handbook in the management field.

¹⁰ See Oxenstierna & Pihlgren (1997)

The reason for concentrating on management questions instead of development of modular curricula, is that other donor projects tend to cover the curricula issues. AmuInternational has taken part in a World Bank financed ILO project on development of curricula and training of Polish curriculum developers. Also, there are PHARE projects in that area. Management of vocational training, however, is not to any significant degree represented in these programs.

The regions identified for taking part in the project are said to be in need of assistance and are considered as "key-regions" from which the experience could easily be diffused. Exactly why these regions are "key-regions" could be further elaborated in the proposal.

The elaboration of a hand book in management training is, of course, an efficient way of disseminating the knowledge and also of importance for unifying management techniques within the ZDZ. In AmuInternational's project in Moscow, the elaboration of handbooks has a prominent place and has been highly appreciated.¹¹

Judging from the prominent results of past co-operation a continuation seems reasonable. The AmuInternational project manager, Alina Maric, has exclusive competence for seeing yet another project successfully accomplished. Also the ZDZ has proven to be a recipient of very high competence.

The co-operation with Amu has been of great importance and the ZZDZ, as well as the ZDZs visited, would like a continuation. Changes within the Ministry of Labour and the NLO has delayed the signing of the new project proposal on the Polish side. Exactly why the government is involved in the signing of this agreement is not quite clear since the ZDZ is a non-governmental organisation. Other explanations would be that the Ministry does not give priority to these projects, or that there is a wish to promote co-operation with other training institutions. However, the Amu has not received any such proposals.

To some degree the ZDZ might be able to finance continued contacts with the Amu without assistance. However, the financial position is said to be unevenly distributed among the ZDZs over the country, and the ZDZs identified in the new proposal are said not to be in a position to finance such a co-operation independently. Yet, since the impression from the ZDZs having taking part in previous projects is that they are quite strong organisations, this is a point which might be developed and explained in the new proposal.

We would suggest that there is a link back to participants in the earlier projects. Follow-up visits could be made to the ZDZs which have been involved and, maybe, participants having taken part in previous projects could be used as trainers and share their experiences with new participants.

¹¹ See Oxenstierna & Pihlgren (1997)

V Conclusions and Recommendations

1. *Main Dimensions of the Evaluation*

This report provides an evaluation of the AMS and Amu technical assistance projects with the National Labour Office and the vocational training organisation in Poland, ZDZ, which have been financed by BITS and Sida between 1994 and 1995. The main dimensions of the evaluation are:

- Achievements of objectives
- Relevance in perspective of the labour market situation and the needs they are intended to serve.
- Whether the results are sustainable
- Side-effects, positive or negative
- Efficiency of project implementation
- Cost-efficiency.

In addition, the report gives Sida recommendations on the potential of supporting future projects and suggests improvements in project objectives and design with special regard to:

- Relevance of projects with regard to the needs they intend to serve and the potential impact of transfer of knowledge from Sweden.
- Organisational strength of the Polish counterparts.
- Possibilities of co-ordination and co-financing with other donors.

2. *Conclusions of Results of Past Co-operation*

Achievements of Objectives

With respect to achievements of objectives both projects have performed well. The visits made by the evaluation team during its field mission in February 1997 all bear witness of that the projects have been professionally delivered and received. We would especially like to mention the model office in Lodz regarding the AMS project and the effects of the Amu project in Slupsk and Bialystok. It appears that the results of these projects, compared to the previous ones in 1991-1993, are stronger. This is explained by experience gathered by the Swedish consultants and a greater readiness and competence on the Polish side to adopt new ideas and new thinking. Marked changes in the Polish society as a whole during the latter years also contributes to the strong local effects.

Relevance

Both projects evaluated have high relevance for the development of the Polish labour market infrastructure and employment policies. The Polish counterparts have proved well capable of adapting Swedish ideas and experiences to the Polish context. In particular,

the Swedish contribution has shown results in the stressing of the importance of active labour market measures. This includes active placement service, active work with employers to increase vacancies reported to the LLOs, introduction of cost efficient modular training courses in vocational training, and also the management in the organisations themselves.

Sustainable Effects and Side Effects

There are clear sustainable effects of the projects. This evaluation was done over a year after the projects were concluded and all findings during the field mission to Poland show that the Polish counterparts have adopted ideas, implemented changes, and further developed ideas and concepts discussed with the Swedish consultants during the training. Also, visit to the LLO and ZDZ in Torun, where the previous project was concluded in 1993, confirmed that effects are long-termed.

The gender equality aspect is not directly addressed in the projects. However, since the major part of labour office personnel are women, women have profited from the AMS-project being its main recipients. The Amu project has resulted in training courses largely directed to women. The courses developed are, for instance, in administrative, economic, and service professions. This represents a valuable addition to the vocational training courses given by Amu's counterpart, which in the past were mainly male occupation oriented. It can also be noted that Polish women have higher unemployment rates than men, and lower outflow from unemployment. Thus, efforts in the labour market area may have indirect positive gender equality effects.

No other particular "side effects" were found, if we by this mean other projects with other counterparts or in other areas having resulted of this co-operation, or any other effects not directly connected to the project efforts.

Efficiency of the Project Implementation

The efficiency of the project implementation was very high in both projects. This may be explained by:

- Good project organisation on both sides
- Experienced and highly competent Swedish experts. In the Amu project the cultural competence was exceptionally high.
- High competence on the Polish side and readiness to adopt new ideas and thinking

Cost Efficiency

Both projects show reasonable cost efficiency in terms of total costs and volume of activities, and in terms of average cost per directly involved participant. Internal administration costs are reported higher for the AMS-project than for the Amu-project, but they are still reasonable, around one fourth of total costs. The Amu-project was concluded at lower cost than planned. The final financial report shows economies of 23 percent which is primarily due to lower direct costs than planned. There were some difficulties to get specifications of costs for separate project activities. This indicate a need for Sida to recommend a standard form for how to present costs for evaluation purposes.

3. ***Recommendations (R#) for Future Co-operation***

Relevance of Project Areas

R1 Labour Market Policies

Sweden has a comparative advantage in giving technical assistance in the labour market field, especially regarding active labour market policies. AMS and Amu have shown high competence in delivering such assistance and the Polish side has proved well capable of adapting Swedish ideas and experiences to the Polish context.

Sida is recommended to continue financing of well defined projects with Poland in the labour market field.

R2 Management of Labour Market Institutions

The last projects between AMS and Amu and their Polish counterparts have not only been geared at transferring know-how regarding labour market policy measures but also directly at the management of the institutions. This assistance is of great relevance to the development of the Polish employment service and training institutions in the transformation of the Polish society. The Polish parties have shown high capability of adapting new management ideas, e.g. decentralisation of decision making, management by objectives, budgeting, demand orientation in the provision of services, and marketing of services.

Sida is recommended to continue financing well-defined projects geared at developing the management within Polish labour market institution.

Organisational and Dissemination Issues

R3 Organisational Strength of Polish Counterpart

Representatives of the Polish side have appeared well organised and in control in both projects.

The Polish labour market authorities, centrally represented by the NLO, and the vocational training institutions ZDZ, centrally represented by the ZZDZ, are highly qualified partners for continued projects with AMS and Amu.

R4 Central and Local Level

The AMS and Amu projects have focused on the development at the local level. Development effects are visible in the local labour offices and local ZDZs. In order to secure dissemination to other parts of the system, it is important to involve the central level of management as well. The central level must understand central concepts and ideas in order to diffuse them.

Sida is recommended to support projects involving the central management of the NLO and ZZDZ in order to strengthen the multiplier effect.

R5 Continuity, Linking together

All Polish participants in previous projects have expressed wishes for some follow-up on previous activities. In addition, these have experience of how to adapt Swedish solutions to the Polish context, which could be shared with new Polish project participants. The fact that the central level does not systematically evaluate effects of assistance, while the centre decides what assistance is to be delivered and to which regions, means that proposals from the local level are not sufficiently considered.

Sida is recommended to support follow-up assistance to previous participants in projects, and also other initiatives creating conditions for continuity of contacts in the

relations between the Swedish and Polish counterparts and also between Polish participants in different projects. One possibility is to recommend that previous participants take part as trainers in new projects.

Project Specific Recommendations

AMS-project

R6 Unifying the Employment Service System

The NLO has good control of where donor assistance is given and evidently tries to distribute assistance according to needs over the country. It is not quite clear, however, whether the NLO has full control over what kind of assistance is actually given, and to what extent different donor assistance might be compatible with one another. Different technical solutions might therefore prevail in different regions, and maybe, there are differences in more central aspects of the organisation of services.

Sida is recommended to support initiatives, as conferences and seminars, aiming at sharing experiences between LLOs and VLOs which have received assistance from different donors, as well as other activities aiming at streamlining and unifying the employment service system.

Amu-project

R7 ZDZ and other Vocational Training Institutions

There seems to be a problem on the Polish side to get the new proposal on co-operation with Amu approved. Although ZDZ is not a governmental institution, the project must be approved by the Ministry of Labour. The ZDZs which have been involved in the projects so far, have been efficient recipients of the assistance, and there are no doubts that further co-operation would also lead to good results. However, if the Polish side have other training institutions which could be accepted as partners by Amu, co-operation could be considered with them as well.

Likewise, other partners than Amu could be considered for ZDZ, since the bulk of the training in the ZDZ-institutions is not for the unemployed but for adults seeking training and retraining on their own accord or on the initiatives of employers. Also the assistance focus a lot on management questions which could also be dealt with by other Swedish suppliers.

Sida should support well defined projects with other partners besides ZDZ in the vocational training area if such proposals are forwarded by the Polish side. Other partners, besides Amu, on the Swedish side could be considered for the ZDZs in assistance not primarily geared at labour market training.

R8 ZDZ - Financial issues

The ZDZ-institutes visited during the evaluation appeared financially strong and in a position to contribute to further Amu co-operation. It is said that the financial position differs significantly among ZDZs over the country why assistance funding is still necessary. However, this could be better explained in the proposal for continued co-operation.

Sida should recommend Amu to elaborate, in new proposals, on the need for particular ZDZs to get assistance and if and how co-operation could become increasingly independent over time

International Co-operation

R9 Co-operation with Other Donors

No particular co-operation with other donors was found. NLO and ZZDZ control that donor assistance is not duplicated in specific regions. However, as has been pointed out in **R6**, there might be a need for meetings and conferences for sharing experiences between people having had assistance from different countries.

Sida is recommended to support initiatives forwarded by the Polish or Swedish sides, or other donors, for arranging and financing meetings, seminars or conferences aiming at sharing different kinds of experience from donor assistance among Polish participants in employment service and vocational training programs.

R10 Co-operation with Transition Economies

The Polish side has expressed wishes for support for developing contacts and co-operation with labour market institutions in other transition economies, e.g. Ukraine, Lithuania, Belarus, and the Baltic states.

Sida should consider its position on this issue, and discuss the relevance and feasibility of joint projects with the Swedish partners.

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Appendix

AMS and Amu Projects in Poland 1994-1995

A1 Terms of Reference

A2 List of Interviewed Persons

97-02-07

Consultancy Assignment: Review of Labour Market Projects in Poland.

Terms of Reference

1. Background

AMS (the Swedish Labour Market Board) and Amu International (the Swedish state-owned vocational training institute) started technical assistance cooperation with the Labour Market Office in Poland in 1990. The first project (POL0061) was evaluated in 1993 by Mikael Brenning, Swedish International Services. The evaluation was, generally speaking, positive and BITS and, later, BITS/Sida has continued financing the cooperation by approving additional projects developing employment service and labour market training in Poland.

The projects to be evaluated are the following:

1) Development of Labour Market Institutions

Decision by BITS 940314, project number POL0062

Swedish partner: AMS.

Budget: 2 360 000 SEK

2) Labour Market Training

Decision by BITS 940506, project number POL0063

Swedish partner: AmuInternational

Budget: 1 816 000 SEK

2. The Team

Sida will contract a team consisting of a team leader and an assistant who shall carry out a review according to the scope of work below. The team shall review the past cooperation and the possibilities for continued cooperation bearing in mind new proposals from the Polish counterparts. The team will also be assisted by Mr. Henrik Huitfelt from Sida, Department for Central and Eastern Europe, whose expenses will be covered separately.

3. Scope of Work

Based on project documentation provided by Sida, and other relevant material obtained in Poland, a field visit to Poland (approximately one week) including discussions with relevant Polish and Swedish parties and representatives of the concerned institutions, the following shall be carried out:

Review of the Past Co-operation

Review the Swedish technical assistance projects described above in the following

dimensions:

- **Achievement of objectives.** Achievement of the project goals as defined in the contracts, taking into consideration possible changes of circumstances.
- **Relevance.** The relevance of the project approach, goals and services provided under the technical cooperation project.
- **Efficiency of the project implementation.** The fulfilment of roles and responsibilities for the parties involved.
- **Reasons for high/low achievement of goals.** Reasons for a high or low achievement regarding i.a. organizational, administrative, financial, institutional and other factors.
- **Costs and benefits.** An estimation of the cost-effectiveness of the project activities carried out and of the planned future activities.
- **Side-effects.** Positive and/or negative effects which were not foreseen during the planning of the project.
- **Conditions for sustainable effects of the project.** Aspects which influence the long term impact of the project.

Opportunities for Continued Co-operation:

Review project proposals and cooperation ideas presented by the counterparts in light of Polish needs and priorities and, thus, with special regard to

- The relevance and potential of the proposed projects
- Organizational strengths and weaknesses of the concerned Polish institutions
- Need for coordination with other institutions and other donors
- Relevance and potential impact of the transfer of knowledge from Swedish inputs
- Possibilities for cost-sharing in possible future projects.

Based on the above findings, **the team shall give Sida recommendations** on the potential of supporting future projects and, if relevant, suggest improvements of existing proposals with regard to project objectives, organization, activities and other design aspects mentioned above with the aim to reach the best possible effect.

4. Method, Time Plan and Reporting

The evaluation should be based on interviews with key persons and participants engaged in project implementation and activities, and on studies of all relevant materials, i.e. decisions, project reports and materials produced in the course of the execution of the projects.

The work should be started during the first half of February 1997 with interviews with key persons in Sweden and collection of relevant materials. A field mission to Poland should be done during late February. Visits should be made to Warsaw and to some other places where the projects have been implemented, i.e. Bialystok, Gdansk, Lodz, Nowy Dwor, Slupsk and Szczecin.

Time of the assignment should not exceed 32 man days (256 hours) including: Work in Sweden, project preparation, report writing and presentations.

The evaluation report shall be written in English. The outline of the report shall follow Sida Evaluation Report - a Standardized Format (see Annex 3, p 71 of Evaluation Manual for SIDA). Two copies of the draft report shall be submitted to Sida no later than March 24, 1997. Within one week after receiving Sida's comments on the draft report, a final version in two copies and on diskette shall be submitted to Sida. Subject to decision by Sida, the report will be published and distributed as a publication within the Sida Evaluations series. The evaluation report shall be written in WP 6.1 for Windows or a compatible format and should be presented in a way that enables publication without further editing.

The evaluation assignment includes production of a summary according to the guidelines for Sida Evaluations Newsletter (Annex 1) and the completion of Sida Evaluations Data Work Sheet (Annex 2). The separate summary and a completed Data Work Sheet shall be submitted to Sida along with the (final) draft report.

List of Interviewed Persons

Ministry of Labour, Warsaw

Remigiusz A. Henczel
Mala Bielawska

Department of International Co-operation, Director
Dept of International Co-operation

National Labour Office, Warsaw

Andrzej Pilat President
Danuta Mozdzenska-Mrozek
Zygmunt Nierada
Agnieszka Sokolowska

Vice President
Head of International Department
International Department

ZDZ, Warsaw

Waldemar Walikowski

Union of Vocational Educational Centres (ZZDZ),
President of the Board

Andrzej Kirejczyk
Grazyna Nosazycka

Association of ZDZ, vice President of the Board
Association of ZDZ, International Department

Voivodship Labour Office, Warsaw

Grazyna Zalewska

Director

Local Labour Office, Nowyi Dwor

Alexandra Heda
Krystyna Skrzypczyńska
Ms Kosela
Orzelska Wiech

Director
Deputy Director
Department of Vocational Guidance
Department of Vocational Guidance

Voivodship Labour Office , Lodz

Mieczyslaw Mik
Wladyslaw Skwarka

Director
Deputy Director

Local Labour Office, Lodz

Jan Wisniewski
Teresa Zientalska
Jozef Jastrzebski
Boguslawa Miecznikowski

Director
Deputy Director
Deputy Director
Manager

Voivodship Labour Office, Gdansk

Grazyna Zielinska

Director

Local Labour Office, Gdansk

Lucyna Mliczek

Director

Training Centre of VLO, Gdansk

Roman Dylewski

Director

Voivodship Labour Office, Torun

Artur Janas

Krystyna Dowgiallo

Mariola Wilmanowicz

Deputy Director

Manager

Manager, Dept. of Information and Management

Local Labour Office, Torun

Daniela Matuszewska

Deputy Director

ZDZ Torun

Boguslaw Suchocki

Michal Weber

Manager

Voivodship Labour Office, Bialystok

Andrzej Kozlowski

Janina Mironiowicz

Director

Deputy Director

ZDZ Bialystok

Zdzislaw Wilczko

Witalis Kurylowicz

Ireneusz Sienko

President

Director, Dept. of Education

Office of the Government Plenipotentiary for Social Security Reform, Warsaw

Michal Rutkowski

Executive Director

Swedish Embassy, Warsaw

Stefan Noreén

Birger Karlsson

Ambassador

Economic Advisor

AMS, Stockholm

Torbjörn Wallin

Britta Tener

AmuInternational

Alina Maric

Stockholm Institute of East European Economics

Anders Bornefalk

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Department for Infrastructure and Economic Cooperation

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S-105 25 Stockholm, Sweden

Tel: +46 (0)8-698 50 00. Fax: +46 (0)8-20 88 64

Telegram: sida stockholm. Postgiro: 1 56 34-9

E-mail: info@sida.se. Homepage: <http://www.sida.se>