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## Exchange of European experiences regarding the development of services of general interest in mountain areas

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Rural Areas. Supporting Initiatives  
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Section: "Enhancing services in rural areas"

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## List of Acronyms

French		English	
Official acronym	Extensive text	Translated acronym <sup>1</sup>	Extensive equivalent
		<i>ADSL</i>	<i>Asymmetric Digital Subscriber Line</i>
		<i>GATS</i>	<i>General Agreement on Trade in Services</i>
		<i>EC</i>	<i>European Commission</i>
		<i>MS</i>	<i>Member States</i>
LDTR	Loi (française relative au) Développement des Territoires Ruraux	<i>RADA</i>	<i>(French) Rural Area Development Act</i>
		<i>NICT</i>	<i>New Information and Communication Technology</i>
PMS	Points Multi-Services	<i>MSP</i>	<i>Multi-Service Points</i>
RTE	Réseau de Transport d'Electricité	<i>PDC</i>	<i>Power Distribution Company</i>
SBSSA	Sciences Biologiques et Sciences Sociales Appliquées	<i>BASS</i>	<i>Biological and Applied Social Sciences</i>
		<i>SGEI</i>	<i>Services of General Economic Interest</i>
		<i>SGI</i>	<i>Services of General Interest</i>
		<i>ICT</i>	<i>Information and Communication Technology</i>
		<i>EU</i>	<i>European Union</i>
		<i>MA</i>	<i>Mountain Area</i>

## List of Official Bodies

French		English equivalent <sup>2</sup>
Official acronym	Full text	
ADF	Assemblée des Départements de France	<i>Assembly of French Departments</i>
AITEC	Association Internationale de Techniciens, Experts et Chercheurs	<i>International Association of Technicians, Experts and Researchers</i>
AMF	Association des Maires de Frances	<i>Association of French Mayors</i>
ANEM	Association Nationale des Elus de Montagne	<i>National Association of Elected Representatives from Mountain Areas</i>
APCA	Assemblée Permanente des Chambres d'Agriculture	<i>Standing Assembly of Agricultural Councils</i>
ART	Autorité de Régulation des Télécommunications	<i>Telecom Regulatory Authority</i>
CRISP	Centre de recherche et d'information sociopolitique	<i>Social and Policy Research and Information Centre</i>
DATAR	Délégation à l'Aménagement du Territoire et à	<i>Spatial Planning and Regional Action Commission</i>

<sup>1</sup> Translator's note: For easier reading, tentative English equivalents (in italics) of some official French acronyms and terms are provided and used in the report.

<sup>2</sup> Translator's note: While ad hoc translations are provided for the French acronyms and terms used in the report, the original French is sometimes used in the text itself.

	l'Action Régionale	
DETEC	Département fédéral (de la Confédération helvétique) de l'Environnement, des Transports, de l'Énergie et de la Communication	<i>Federal Department (of the Swiss Confederation) for the Environment, Transport, Energy and Communication</i>
DIACT	Délégation Interministérielle à l'Aménagement et à la Compétitivité des Territoires	<i>Interdepartmental Commission for Regional Spatial Planning and Competitiveness</i>
EDF	Electricité de France	
NORDREGIO		<i>Nordic Centre for Spatial Development</i>
MAP	Ministère (français) de l'Agriculture et de la Pêche	<i>(French) Ministry of Agriculture and Fisheries</i>
WTO		<i>World Trade Organisation</i>
SAB	Groupement suisse pour les régions de montagne	<i>Swiss Grouping for Mountain Areas</i>

## Summary

This report on the services of interest general in mountain areas in Europe was carried out by Euromontana (European association for the development and cooperation of mountain areas) in 2006 within the framework of the Call for Projects of the French Ministry of Agriculture and Fisheries.

The services of general interest are undergoing great changes regarding their definition, evaluation and developments in the territories, pushed by an international movement. The economic future and maintaining population in the mountain areas will not be possible without maintaining the services adapted to the population, the people and the companies. To answer these challenges, mountain actors must react by developing expertise and proper competences and in seeking recognition for their rights and their needs to develop sustainable strategies for modern and innovating mountain territories.

Therefore, the main goal of this document is to exchange experience on the innovating aspects of service organization, legislation or technologies. In this spirit, this report does not plan to propose an exhaustive inventory but to gather some points on the current European legislation and new initiatives.

After a presentation of the concepts and definitions of the services in some states and in the communitarian and international level, the document analyses three types of services of general interest: new information technologies, the postal services and education, with a particular emphasis on mountain areas. A look at the legislation and consultations in the European Union shows that by 2010 the latest the context of the services of general interest will be completely re-examined. It will be also noted that even if subsidiarity more or less applies according to the type of service, a considerable role is left to the local actors to federate the interested parties to maintain public services in rural zones and to find multisectorial strategies of co-operation.

The factsheets section introduces some local initiatives, although it cannot be taken as an exhaustive list of the most relevant experiences. Thus, on the new technologies, we will describe Cybercantal II in France; tele cottages in Hungary; the partnership between SAB and Microsoft in Switzerland; the program HØYKOM and eGovernment in Norway; the training in ICT (1. information and communication technologies) for the rural zones in the Spanish Basque Country. On postal services and their accessibility we will present the regulation of the postal activity in France and Imago project in Switzerland.

Finally on training, comprising primary and secondary schools but also the training for companies (lifelong learning, apprenticeships...), we will consider the MSc2 (Master of Science) on 'sustainable management of the development of mountain areas' in Scotland; social integration through the training of women in the ICT in Bugey in France; the transnational school project within the framework of Leader + in Spain and in Ireland. Even if these examples may not be directly transferable, they offer food for thought and a possibility for exchange with the project coordinators, whose contact information is provided.

## Introduction

Services of general interest have been under the spotlight in recent years following an international drive toward their liberalisation in a number of sectors. One after the other, all governments – including the EU – have been developing legal frameworks and reforming their legislation. This requires a thorough re-examination of the different concepts underlying these services which, at EU level alone, has generated a degree of complexity in view of the wide diversity of prevailing approaches.

While these changes directly affect both people's quality of life and the improvement of European society's wellbeing, they also bear a major influence on the homogeneous development of Europe's different geographical areas and territories. Indeed, social and territorial cohesion are at the heart of the policy debate. What do EU member – and other European – State strategies need to be for the development of these services in remote, poorly accessible and sparsely populated areas in the absence of a critical mass of commercial service providers?

Mountain areas are living environments that are suffering and will continue to suffer if decisive, practical action is not taken soon. First and foremost at EU and national policy level, genuine commitments supported with financial resources need to be made and expertise needs to be developed alongside subnational efforts. At local level, services of general interest will need to be developed through innovative initiatives implemented following consultation with – and with the participation of – all stakeholders.

In view both of the broad scope of public services (also known as Services of General Interest or SGI) as a general focus and of the size of the geographical area covered by the present report – including the EU and Member State levels as well as other, non-EU countries – the need was identified, within the limited time available, to restrict the focus of this study to certain services.

The main aim of this document, produced following a call for projects launched by the French Ministry of Agriculture and Fisheries, is to share experiences on innovative organisational, legislative and technological aspects. With this in mind, rather than seeking to submit an exhaustive inventory, it tries to bring into focus a number of points, current EU legislative affairs and innovative ideas to produce a compendium for use as a tool to support national and local policy discussions on the preservation and development of quality SGI<sup>3</sup> in European mountain areas.

It was decided to work from a generalist approach based on the perspective of the users of these services, i.e. both individuals/people and businesses. Therefore, the services of general interest to be studied were identified from the holistic perspective of Euromontana's treasured mission statement: to work every day for the sustainable development of mountain areas. It was with this in mind that the main research focus was placed on individual and business services.

Having thus identified the target groups, existing literature was researched to clarify a number of terms and concepts and identify the typology of services to be considered. Those were then studied in greater detail, as well as their EU legislative context, sometimes with the addition of references to national approaches. Finally, the report includes factsheets about some experiments that were considered interesting. These are presented in summarised form.

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<sup>3</sup> SGI: Services of General Interest.

# Chapter 1: General Framework of Services of General Interest: Definition of Terms and Concepts and Topicality

## 1/ Services of general interest – Definitions

### **a/ Services of general interest: EU Issues and Relevance**

As clarified by the EU Commission, there are two reasons why services of general interest are at the heart of the EU policy debate. First, they relate to the determination of the role to be played by public authorities in a market economy. Second, they directly affect the society model which the EU seeks to promote among its citizens. The Commission likes to consider SGI a “pillar” of the European society model (White Paper, 2004<sup>4</sup>).

The EU considers services of general interest to be essential for social and territorial cohesion as well as for economic competitiveness. In this sense, the reasoning encompasses the needs of citizens and enterprises alike. Thus, the provision of quality, accessible and affordable SGI meeting the expectations of consumers and enterprises is a key strategic requirement for the development of the EU in future. A few years ago, the European Institutions consequently embarked upon a major introspective journey into the Member States’ habits and customs in this field and tried to define the role to be played by the EU Commission.

Concurrently, non EU member countries including Switzerland and Norway modernised their SGI delivery systems to reflect constant changes in technology and the economy.

### **b/ Services of General Interest: A Complex and Multifaceted Concept**

In many ways, services of general interest are a very complex notion. Consequently, studying them is far from simple, especially from a European perspective.

First, there are terminological and semantic differences between Member States reflecting different historical, economic, cultural and political backgrounds. Because of these, sharing experiences is at best inaccurate and may cause misunderstandings in the EU policy debate. A number of definitions and a list of proposed terms for use in this project are therefore offered in Section 2 of Chapter 1.

Because of the close connection between SGI and the policy, social, economic and technological realities of the different countries, their practical characterisation is constantly evolving. Thus, their definition varies in space – between regions – and over time. Therefore, new legislation needs to be flexible enough to adjust to local circumstances and must be reviewable on a regular basis.

SGI cover very different sectors of the economy including transport, postal services, telecoms, the electronic media, healthcare, education, social services, etc. Therefore, addressing SGI on a crosscutting basis requires a concurrent reference to sectoral policies.

### **c/ Some Definitions Relating to the Concept of “Services”**

In view of the potential confusion surrounding the concept of “service”, the section below discusses definitions of the different notions. As a starting point, it was decided to use the terminological definitions used by the EU Commission as listed in Annex 1 of the White Paper<sup>5</sup> (2004).

#### **c.1 Services of General Interest and Services of General Economic Interest**

##### Services of general interest - SGI

The term “services of general interest” cannot be found in the EU Treaty itself (the **Amsterdam Treaty**)<sup>6</sup>. It is derived in Community practice from the term “services of general economic interest”, which is used in the Treaty. SGI cover both market and non-market services which the public authorities class as being of general interest and subject to specific public service obligations (White Paper, 2004). In her Information Report on

<sup>4</sup> **White Paper** on Services of general interest: COM(2004)374 final.

<sup>5</sup> **White Paper** on Services of general interest: COM(2004)374 final.

<sup>6</sup> **The Amsterdam Treaty** (also referred to as the EU Treaty) was signed on 02 October 1997 and entered into force on 01 May 1999 (see <http://europa.eu.int/eur-lex/fr/treaties/dat/amsterdam.html>).



the White Paper on SGI, French Senator C. Tasca (2005) adds that SGI are provided by national/local public authorities to their constituents under their direct control or by third parties under service concession agreements.

#### Services of general economic interest - SGEI

This term is mentioned in the EU Treaty but is not defined in the Treaty or in secondary legislation. However in Community practice, there is broad consensus that the term refers to services of an economic nature which the Member States or the Community subject to specific public service obligations by virtue of a general interest criterion. The concept of services of general economic interest thus covers in particular certain services provided by the big network industries such as transport, postal services, energy and communications (White Paper, 2004). C. Tasca (2005) specifies that these services are provided to users against a fee, although public authorities may subsidise them to encourage their use among vulnerable groups or in disadvantaged geographical areas. The EU affirms a specific status for SGEI in primary EU legislation with respect to competition and Single Market considerations.

Indeed, the Green Paper suggests a distinction between three categories of services of general interest as regards the need and intensity of Community action and the role of the Member States (Green Paper, 2003<sup>7</sup>):

- **Services of general economic interest provided by large network industries;**
- **Other services of general economic interest** (not subject to a comprehensive regulatory regime at Community level but to whose provision specific rules may apply, such as environmental legislation – namely governing waste management, water supply, broadcasting services, etc.);
- **Non-economic services and services without effect on trade** (not subject to specific Community rules nor covered by the internal market, competition and State aid rules of the Treaty but covered by those Community rules that also apply to non-economic activities and activities that have no effect on intra-Community trade, such as the basic principle of non-discrimination).

Remark: economic and non-economic services can co-exist within the same sector and can sometimes even be provided by the same organisation.

### **c.2 Public Service**

The term “public service” is commonly used in France and the Swiss Confederation but does not really seem to be in widespread use elsewhere. It is based on a relatively imprecise definition that may create misunderstandings. Indeed, the term “public” sometimes refers to the fact that a service is offered to the general public, but it may also highlight the fact that a service has been assigned a specific role in the public interest, and it sometimes alternately refers to the ownership or status of the entity providing the service (confusion between public service and sector) (White Paper, 2004). In its Green Paper on services, the EU Commission emphasises that the terms “service of general interest” and “service of general economic interest” must not be confused with the term “public service”, which is less precise.

It was therefore decided not to use the term “public service” whenever reference is made to SGI below.

### **c.3 Community and Human Services**

#### Community services

This term can be tentatively defined as applying to all public services (i.e. provided and/or funded by public authorities) and services to the public – i.e. to individuals and enterprises – in the form of activities of general interest funded and/or provided by bodies other than public entities. It is widely used in France, Austria and Germany and is gaining ground in Switzerland.

The PUSEMOR<sup>8</sup> project includes one initiative to promote ownership of this term and the underlying concept by the national Governments of its partner organisations.

<sup>7</sup> **Green Paper** on Services of general interest: COM(2003)270 final.

<sup>8</sup> Interreg IIIB Project PUSEMOR (<http://www.pusemor.net/>): Public Services in Sparsely Populated Mountain Regions: New Needs and Innovative Strategies.

### Human services

The concept of human services was first defined in France at the National Convention for the Development of Human Services held on 22 November 2004. However, it has been impossible to find any corresponding definition at European level. Human services include all services aiming to improve citizen wellbeing where they live, work and holiday<sup>9</sup>. A wide variety of professions are associated to the provision of human services, belonging to five broad categories:

- Family services (childcare, learning support, etc.);
- Health improvement services at home or at work;
- Services aiming to improve the quality of people's daily life at home (IT assistance, meal delivery, hair care, etc.) or at work (business caretaking, support for everyday needs, etc.);
- Home and living environment services (home security, gardening, etc.);
- Mediation services (occasional legal advice, help to complete administrative procedures or find housing, etc.)

## **2/ Trends in Services of General Interest – Provision and Obligations**

The legislative scope of SGI is currently undergoing substantial changes. While the development of services has admittedly always had to reckon with the different stakeholders involved in their supply (i.e. providers and/or funding authorities) as well as their users (the general population and/or enterprises), a new strategy is emerging as part of this change to adjust to the requirements of public service whereby broad consultation takes place involving field actors in the design of flexible services tailored to the needs of specific audiences.

### **a/ General Remarks**

#### **a.1 International Context: Liberalisation of Services Under the Impetus of the WTO<sup>10</sup>**

At international level, the WTO<sup>11</sup> developed the first multilateral agreement on trade in services (not specifically SGI) and initiated a liberalisation process in this sector. This was done in 1994 under the General Agreement on Trade in Services (GATS) negotiated as part of the Uruguay Round.

The WTO explained that initially, a number of countries had doubts – or fundamentally opposed – the principle of regulating trade in services. There was a perception that some services (e.g. hospitality, human and other services) traditionally belonged within the national borders of individual countries and could not be regulated in the same way as trade in goods. Other industries (railways, telecom, etc.) were considered the property or *purlieu* – and sometimes even the natural monopoly – of the State. Finally, a third group including healthcare, education and other services were in many cases considered to fall under the responsibility of the State due to their importance in terms of social and territorial cohesion. The WTO mentioned that nowadays, services are the fastest growing sector, representing two thirds of world production, a third of worldwide jobs and 20% of global trade.

According to some observers, while negotiations enabled the basic structure of an agreement to be developed, its consequences in terms of actual liberalisation were relatively limited. With a few exceptions in the financial services and telecom industries, most members simply confirmed the status quo in a number of sectors. This is partly explained by a desire among Member States to gather expertise before considering a broadening in scope and depth of their commitments. Also, administrations needed time to develop necessary legislation, quality standards and other aspects in order to ensure that external liberalisation would be compatible with their fundamental policy objectives (quality, fairness, etc.).

For instance, the Swiss Confederation indicated in one of its reports the Federal Council's desire to pace progress in this field and mentioned that "several examples abroad have shown that thoughtless, hasty reforms threaten the quality of public services" while underscoring that "it is only possible to progress carefully when reforms are initiated early enough"<sup>12</sup>.

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<sup>9</sup> Source: *Plan de développement des services à la personne* ("Human Services Development Plan"), French Ministry of Employment, Labour and Social Cohesion, Feb. 2005.

<sup>10</sup> Source: website [http://www.wto.org/french/tratop\\_f/serv\\_f/s\\_negs\\_f.htm](http://www.wto.org/french/tratop_f/serv_f/s_negs_f.htm).

<sup>11</sup> WTO: World Trade Organisation.

<sup>12</sup> Source: Federal Council Report *Le service public dans le domaine des infrastructures* ("Public Infrastructure Services"), 2004.

## **a.2 The EU and Services of General Interest: "Controlled" Liberalisation**

It was essentially during the second half of the 80s that several SGEI sectors progressively became competitive within the EU including mainly telecoms, postal services, transport and energy. In its Green Paper (2004), the EU Commission explained that while the long term impact of SGEI liberalisation is not known yet, "controlled" liberalisation has always been the preferred approach, with a progressive opening of markets supported by measures including consideration of the concept of universal services.

Against the backdrop of successive enlargements and a redefinition of EU roles and functioning, SGEI have come to play an increasingly significant role. They now rank among the values shared by European societies and represent a pillar of social cohesion for the EU as a whole. The complexity of their regulation relates to the fact that they touch upon the central question of the role public authorities play in a market economy (Green Paper, 2003). The White Paper (2004) refers to a consensus at EU level in favour of the harmonious combination of market mechanisms and public service missions.

Although differences are in evidence regarding the organisation of SGI in Europe, all Member States acknowledge their crucial importance – while deriving different legal consequences from this admission. In this instance, the respective positions of Civil and Common Law countries are opposed.

### **b/ The EU Framework**

#### **b.1 Context**

Whether in sectoral or other policies, the pace of legislation is accelerating as a few countries aim to liberalise a number of sectors (e.g. postal services) by the end of this decade.

This being said, the intention of the EU Commission when tabling its White Paper was not to bring the EU policy debate to its conclusion. Rather, it aimed to feed and further the ongoing discussion by ensuring that the services in question functioned properly.

#### **Overview of progress in the EU debate and legislation on SGI as of 30/11/2006:**

- 10/2001: Report of the EU Commission to the Laeken European Council on Services of general interest (COM(2001)598 final)
- 11/2002: Report from the Commission on the state of play in the work on the guidelines for state aid and services of general economic interest (COM(2002)636 final)
- 05/2003: **Green Paper** on Services of general interest (COM(2003)270 final)<sup>13</sup>
- 05/2004: **White Paper** on Services of general interest (COM(2004)374 final)<sup>13</sup>
- 02/2005: OPINION of the European Economic and Social Committee on the Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on the White Paper on services of general interest
- 07/2005: Community Framework for State Aid in the Form of Public Service Compensation (DGCOMP/I1/D(2005)179)<sup>13</sup>
- 04/2006: Communication from the Commission – Implementing the Community Lisbon programme: Social services of general interest in the European Union (COM(2006)177 final)

To this list must be added the legislation and debate on EU sectoral policies, a tentative schedule for which is put forward in the Green Paper. Since the scope of the present paper does not make it possible to discuss all sectors, an update is provided about the respective sectors covered in the corresponding sections.

Throughout its Green Paper, the EU Commission reaffirms the principle of subsidiarity and states a shared responsibility for the EU and the public authorities of the Member States but leaves it up to the latter to determine precisely which services need to be provided and how. It also emphasises that it is primarily for the competent national, regional and local authorities to define, organise, finance and monitor services of general interest.

Worth noting is that the scope of the Directive on Services in the Single Market includes SGEI in the social and healthcare sectors, not SGI.

<sup>13</sup> Visit [http://ec.europa.eu/employment\\_social/social\\_protection/questionnaire\\_fr.htm](http://ec.europa.eu/employment_social/social_protection/questionnaire_fr.htm)

## **b.2 A Common Set of Obligations for Services of General Economic Interest**

The EU Commission abandoned its idea of developing a single universal definition for the content of services of general interest. Still, EU legislation on SGEI does include a number of elements that are common to the different sectors. The EU Commission pleads for consideration of these notions as the foundation for the definition of a Community concept for SGEI (White Paper, 2004). These are:

### b.2.1 Universal service

This concept was introduced to ensure that certain services are made available at a specified level of quality to all consumers and users throughout the territory of a Member State, independently of geographical location, and, in the light of specific national conditions, at an affordable price. These requirements are in the general interest. It has been developed in particular for some of the network industries to ensure that in a liberalised market, every individual has access to the service at an affordable price and that service quality is maintained and, where necessary, improved (Green Paper, 2003).

Universal service is a dynamic concept adjusting to citizens' evolving environment and needs. It is also a flexible concept adhering to the principle of subsidiarity for the Member States (Green Paper, 2003).

### b.2.2 Continuity

A number of services of general interest are characterised by a continuity requirement, i.e. the provider of the service is obliged to ensure that the service is provided without interruption. Worth pointing out is that the requirement of ensuring a continuous service is not consistently addressed in sector-specific Community legislation. Indeed, depending on the sectors, Member States are sometimes free to decide whether this obligation exists or not (Green Paper, 2003).

### b.2.3 Service Quality

The definition, monitoring and enforcement of quality requirements by public authorities are key elements in the regulation of SGI. In the sectors that have been liberalised, it is generally up to the Member States to define quality levels although in some cases quality standards are defined in Community legislation. These include, for instance, safety regulations, the correctness and transparency of billing, etc. The most developed regulation of quality at Community level can be found in the legislation on postal services and on electronic communications services (Green Paper, 2003).

### b.2.4 Affordability

This concept was originally developed in the context of the regulation of telecommunications services and then extended to postal services. It requires SGEI to be offered at an affordable price in order to be accessible for everybody. This principle contributes to economic and social cohesion within the Member States (Green Paper, 2003).

### b.2.5 User and Consumer Protection

These horizontal consumer protection rules apply to SGI as in other sectors of the economy. However, because of the particular economic and social importance of these services, specific measures have been adopted in sectoral Community legislation. Such specific measures are set out in a number of sectors including electronic communications, postal services, energy, transport and broadcasting. The EU Commission also stressed the need to address citizens' concerns that are of a wider nature (e.g. the environment), to consider the specific needs of certain categories of the population (e.g. handicapped people) and to ensure complete territorial coverage of essential services in remote areas.

### b.2.6 Other Specific Obligations

Other sectoral obligations may complement the five above including safety and security, security of supply (sustainable long-term provision), network access and interconnectivity (meeting competition policy and internal market objectives) and media pluralism (to protect the freedom of expression) (Green Paper, 2003).

## **b.3 Financing**

Many services of general interest cannot be viably provided on the basis of market mechanisms alone and specific arrangements are necessary in order to ensure the financial equilibrium of the provider. Currently, it is for the Member States to ensure the financing of services of general interest and to calculate the extra cost

of the provision of such services. In some cases, the Community may contribute by way of co-financing to the funding of specific projects (Green Paper, 2003).

Depending on historical traditions and the specific characteristics of the services concerned, Member States apply different financing mechanisms including:

- Direct financial support through the State budget (subsidies, tax reductions, etc.);
- Special or exclusive rights (e.g. a legal monopoly);
- Contributions by market participants (e.g. through a universal service fund);
- Tariff averaging (e.g. a uniform country-wide tariff despite local differences);
- Solidarity-based financing (e.g. social security contributions) (Green Paper, 2003).

Whilst different forms of financing continue to co-exist, a clear trend has developed toward progressive withdrawal of exclusive rights and opening of markets to new entrants and other forms of financial support have developed such as the creation of specific funds financed by market participants or direct public funding through the budget (the latter being the least distorting form of funding). These forms of financing have made the cost of providing SGI and the underlying political choices more transparent (Green Paper, 2003).

The Member States are generally free to choose which system is most appropriate in their case provided that it does not unduly distort the functioning of the Single Market. State aid rules only prohibit overcompensation.

DG Competition of the EU Commission published the Community Framework for State Aid in the Form of Public Service Compensation in July 2005<sup>14</sup>. This document sets out the framework for identifying "genuine" SGEI, which Member States have a wide margin of discretion to do; it also stipulates that the Member States have to develop an instrument specifying the public service obligations and the methods of calculating compensation. The Community Framework addresses the issue of the amount of compensation and the notion of overcompensation. It further mentions that the Framework applies without prejudice to the more restrictive provisions of sectoral Community legislation and measures (DGCOMP/I1/D(2005)179).

This Community Framework follows from an EU Commission Report (COM(2002)636 final) mentioning three rulings that will become EU case law, one of which is especially notorious: the so-called Altmark Trans GmbH ruling. At the time of this report (2002), the EU Commission namely regretted the absence of a definition of SGEI and the extent of Member State freedom in relation to the scope of Community State aid rules, etc. Since then, the EU Commission has undertaken major clarification work.

The EU Commission mentions that the Community Framework (DGCOMP/I1/D(2005)179) will apply for a period of six years and that four years into its implementation, the Commission will undertake an impact assessment based on factual information.

### **3/ Characterisation of Mountain Areas in Europe**

#### **a/ Characterisation of Mountain Area Populations**

Mountain areas (MA) account for 40% of European territory and they are home to as much as 19% of its population, i.e. 76 million people (**NordRegio, 2004**<sup>15</sup>). While the geographical distribution and age structure of mountain populations vary across both countries and massifs, people over 60 are overrepresented (or proportionately as numerous) in mountain areas compared to the lowlands.

However, considering demographic variations in these areas, the NordRegio study (2004) categorically argues that in the vast majority of countries, depopulation is a stronger phenomenon in mountain areas compared to the lowlands – with more or less substantial differences between countries. An explanation for this depopulation trend is likely to be found in the phenomenon of emigration rather than in a lower both rate.

Thus, while the mountain populations of Europe are characterised by a wide diversity of features, the general trend toward depopulation observed in the vast majority of countries needs to be taken seriously.

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<sup>14</sup> Visit [http://ec.europa.eu/employment\\_social/social\\_protection/questionnaire\\_en.htm](http://ec.europa.eu/employment_social/social_protection/questionnaire_en.htm).

<sup>15</sup> Nordregio (2004), *Mountain areas in Europe: Analysis of mountain areas in EU Member States, acceding and other European countries*. Report 2004: 1, Nordregio, Stockholm. 271 pages

## **b/ Enterprises in Mountain Areas**

According to the NordRegio study (2004), although the overall structure of employment in mountain areas is complex and varies across countries and regions, pluriactivity is very common. It often leads to the combination of farming activities (primary sector) in the evenings and weekends and work in a factory (secondary sector) on weekdays.

Despite this complexity, a number of trends are in evidence. The primary sector, i.e. agriculture, is overrepresented in mountain areas compared to the lowlands (this is true in most countries) and this sector is more developed in the mountains of southern Europe. The proportion of employment in the secondary sector is similar in mountain and lowland areas. In almost all countries, the tertiary sector is less represented in mountain than in lowland areas, although it is relatively well established (about 70%). It is also mostly private in comparatively more prosperous areas and public in mountain areas facing decline.

## **4/ Economic Development and Services in Mountain Areas**

The NordRegio study (2004) also discussed the conditions of access of mountain area populations to services in Europe and showed that mountain people often have to travel far from their homes to gain access to such services, especially at higher levels (e.g., specialised hospitals, universities).

The study further emphasised that the depopulation trend observed in these areas has a major negative impact on service accessibility. ANEM (PLM 155, 2005) believes that investment in services is a solution to interrupt this downward spiral.

It seems then, that co-operative attempts such as intraregional co-operation initiatives or public-private partnerships can be seen as ad hoc ways of coming to terms with the shortage of services (NordRegio, 2004).

ANEM argues the importance for mountain policies to adjust to the specific needs of mountain areas and proposes to redefine the concept of "public service closeness to users" for the purpose of replacing the "number of inhabitants served" as a parameter by the combined indicator "number of inhabitants served and area covered". The low relative weight of individual users would then be compensated by a low population density (ANEM contribution to the report for the National Conference of Public Services in Rural Areas, Nov. 2005).

In its contribution, ANEM further adds that when it comes to the provision of a public service, there is a greater risk in the mountains than anywhere else of "defining locally highly composite – not to say heteroclite – assignments whose delivery requires both adaptability and high-level skills<sup>16</sup>. In order to mainstream this key requirement into the sustainability of rural areas – especially in the mountains –, adaptability needs to become a fully-fledged management technique which civil service endorses and specifically trains into. Adaptability cannot be limited to counter skills only: it has to be supported by genuine user reception, advice and referral skills".

Debarbieux & Bätzing argue that in the case of mountains, in order to examine the quality of services and their relation to the overall sustainability of territories, there is a need to also study the foothill and lowland areas to which they are connected by relationship and exchange networks (in Euromountains.net, 2006<sup>17</sup>).

While many findings are presented to demonstrate the usefulness of maintaining services for people, their maintenance is no less useful for enterprises and their employees as they contribute to the development of mountain areas.

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<sup>16</sup> Source: ANEM contribution to the report for the National Conference of Public Services in Rural Areas, Nov. 2005.

<sup>17</sup> Interreg III C project Euromountains.net, Theme 1–Services in mountain areas - visit [www.euromountains.net](http://www.euromountains.net).

**Some findings of a survey<sup>18</sup> conducted in France (DATAR, 2005)**

Some results...

- > expectations are of a "wide(r) range of services", i.e. a quality-of-life insurance
- > service quality is more important than closeness (quality of reception, skilled staff and quick responses);
- > shorter opening hours seem to be more relevant than service removal;

... and proposals:

- Multiservice points or SGI provision in local shops (relatively unknown – but favourably received – among the population);
- Facilitating administrative procedures through web accessibility, appointment systems or provision at home.

One project focusing specifically on the theme of services in mountain areas is underway in the Alpine Space.

**PUSEMOR Project (Interreg IIIB Alpine Space)**

**'Public Services in Sparsely Populated Mountain Regions: New Needs and Innovative Strategies' – January 2005-June 2007**

Aim:

This project aims at developing sustainable strategies to improve the quality of public services in sparsely populated mountain regions and secure their long-term provision. This with the objective of maintaining satisfactory levels of economic activity and quality of life in these regions.

Strands:

The project includes two strands:

- analytical/scientific research to know the situation in each of the countries and promote an exchange of experiences;
- formulation of policy strategies and delivery of pilot projects.

Programme activities:

- Regional;
- Transnational comparison of the situation in the different regions;
- Identification of good ideas and ways to improve public services;
- Development of pilot projects in the regions;
- Development of policy recommendations for the different stakeholders.

12 partner regions in six countries:

France, Switzerland, Austria, Germany, Italy, Slovenia.

*For further information, visit [www.pusemor.net](http://www.pusemor.net)*

## **5/ Introduction to the Three Types of SGI Studied in the Report**

Considering their relevance in mountain areas, the wealth and quality of the feedback from the membership and Euromontana network, it was decided to focus on three types of services, i.e. new information and communication technology, postal services and education and training.

### **a/ New Information and Communication Technology**

There is a double justification to the use of new information and communication technology (NICT): it improves the quality of service provision in mountain areas and reduces their isolation. Indeed, mountain areas are often characterised by a high degree of isolation (more or less critical according to the seasons) from urban centres and consequently from marketplaces and employment pools. In these areas, access to quality and affordable telecom service provision is even more critical than in other European regions and becomes an essential precondition of survival and economic development.

<sup>18</sup> Public Services in Rural Areas – telephone survey conducted by CSA for DATAR on 26-29 August 2005 with a representative sample of 805 people aged 18+ living in a predominantly rural environment and municipalities of fewer than 2,000 inhabitants.

The decision to focus on NICT as SGI is supported by the findings of several studies. Between July and September 2005, the EU Commission conducted a public consultation on broadband<sup>19</sup> and the territorial divide, which led to the publication in March 2006 of a Communication on a European initiative for growth and jobs. Access to broadband in rural and remote areas is limited due to the high cost of physically connecting sparsely populated areas and the absence of economies of scale caused by geographical isolation. Commercial incentives are inadequate and “market failures” are in evidence. For instance, the paper observes that 62% of households in rural areas are connected to the internet and 8% are broadband subscribers, against 85% and 18% respectively in urban areas.

Further, access to ICT is considered an effective tool to stimulate entire sectors of the economy. Therefore, it seems critical for mountain areas to derive the same benefits from new technology as other regions and so enjoy a level playing field in this respect.

This new technology facilitates local take up of innovative systems to access information and training as well as administrative and even possibly healthcare services in areas where mobility is both a complex and costly proposition.

The issue of ICT provision and access is twofold. First, effective legislation (e.g. through its definition as a “universal service”) needs to be adopted so that appropriate resources can be allocated for infrastructure development – leveraging the Structural Funds could be an alternative. Second, awareness and effective use of this technology should be promoted among the general population. The experiments presented below illustrate these aspects of the theme called “Access to ICT”.

## **b/ Postal Services**

A French Government survey (DATAR, 2005<sup>20</sup>) shows that according to the population of rural areas, post offices have enormous symbolic value. Indeed, when it comes to prioritising public services for maintenance, post offices rank a strong first (47%), far ahead of schools and hospitals (16% and 13% respectively). Keeping a post office up and running in small rural municipalities is considered key to the wellbeing and welfare of rural communities.

EU Commission work equally shows that as a sector, postal services are economically very important because they drive the competitiveness of other industries. However, still according to the EU Commission, there is a need to reform the postal services market in view of the strong increase in electronic communication. At present, the Commission is discussing the complete liberalisation of postal services in 2009 as planned under Directive 97/67/EC. As a sector, postal services generate 1% of EU GDP.

As things stand, it is our contention that specific attention must be paid as a matter of priority to the number of access points (mailboxes and post offices) and public tariffs applicable in mountain areas – an aspect on which EU guidance is sketchy. The steps/measures taken to preserve access to quality postal services in remote areas vary considerably between Member States.

## **c/ Education and Training**

As emphasised in the NordRegio report (2004), the lack of access to higher education has long been identified as a critical constraint to development. To gain university-level education, many young people leave the mountains to go to cities and all too often never return.

A 2005 survey of ANEM Board members on services of crucial import for mountain populations showed that schools and post offices are considered to be the key basic services.

The populations of mountain areas need skills in all domains since they often work multiple jobs because of the seasonal nature of the local economy. Thus, mountain workers need a broad knowledge base to be adaptable and so adjust to labour demand that varies over time.

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<sup>19</sup> Broadband: a type of connection that enables high throughput internet access. A number of technologies enable broadband access: cable phone and TV, wireless, fibre optics, satellite, power grid and ADSL (Asymmetric Digital Subscriber Lines) – the latter being the reference technology in the EU.

<sup>20</sup> *Survey on public services in rural areas*, DATAR & French Ministry of Home Affairs and Spatial Planning, 06 September 2006.



## Chapter 2: New Technology, Postal Services and Education: Community Framework and Examples of National Approaches

### 1/ Information and Communication Technology

#### 1.1 – The EU Context

According to the EU Commission<sup>21</sup>, against the worsening of the global competitive position of the EU, investment in Information and Communication Technology (ICT) is a source of growth and competitiveness. The ICT sector has continued to experience higher than average growth, with estimated revenue increases of 3.6% in 2005. It is the most innovative and research intensive sector in the EU, representing 25% of the total EU research effort and 5.6% of its GDP in 2000-2003. The EU Commission further argues that ICT generated at least 45% of EU productivity gains in 2000-2004. Digital convergence is finally becoming a reality. Investments in networks resumed in 2004-2005 and broadband subscriptions grew by 60% in 2005.

#### Overview of progress and future programmes in connection with EU legislation and discussions on information and communication technology as of 30/11/2006:

- 12/1999: Launch by the EU Commission of the European initiative **eEurope** to bring the benefits of the information society to all Europeans (followed by the **eEurope 2002** Action Plan in June 2000)
- 06/2001: Presentation of the **eEurope+** Action Plan to the Heads of States and Governments of the 10 accession countries (roadmap to accelerated economic modernisation)
- 06/2002: Seville Council – the Member States adopted the objectives of the **eEurope 2005** Action Plan and asked for their effective implementation by the end of 2005
- 06/2005: Launch by the EU Commission of the Initiative “**i2010 – A European Information Society for Growth and Employment**”
- 03/2006: Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions – “**Bridging the Broadband Gap**” – COM(2006)129 final

#### Coming:

- 2007: EU Commission initiative Promoting the exchange of good practices to bridge the broadband gap between EU regions => Development of a website; event on the benefits of broadband for rural areas (February 2007)
- Inviting the Member States to modernise their regional broadband strategies in the context of the Renewed Lisbon Strategy
- Monitoring market developments, in particular in the new Member States. Assessment of progress with programme delivery is expected in 2008.

The **eEurope effort** is not about creating new institutions or laws. It is about bringing coordination and a common goal to political actions that already take place. For instance, each EU country has the exclusive right to decide how its schools and public services systems work (national competence). They have however decided to try to learn more from each other and this method is referred to as the "open method of coordination". Regional or local authorities are often responsible for the action on the ground. In terms of EU competence, some of the legislation relating to trade in goods is adapted to take account of new technologies. The EU budget finances programmes to promote development in less well off regions, research, educational exchanges, etc. (Towards a Knowledge Based Europe, 2002)<sup>22</sup>.

This is how in 2003 the EU15 implemented national broadband strategies as part of the **eEurope 2005**<sup>23</sup> action plan. While acknowledging the role of competition in stimulating private investment, all strategies ascribe governments a role in ensuring territorial coverage in case of market failures (COM(2006)129 final<sup>24</sup>).

<sup>21</sup> Source: [http://ec.europa.eu/information\\_society](http://ec.europa.eu/information_society).

<sup>22</sup> *Towards a Knowledge Based Europe - The European Union and the information society*, "Europe on the Move" series published by the European Commission, Directorate General Press and Communication. October 2002. 19 pages Document accessible on and downloadable from the Europa Website: [http://ec.europa.eu/publications/booklets/move/36/index\\_fr.htm](http://ec.europa.eu/publications/booklets/move/36/index_fr.htm).

<sup>23</sup> eEurope's key objectives are to bring every citizen, home and school, every business and administration, into the digital age and online. It plans to create a digitally literate Europe, supported by an entrepreneurial culture ready to finance and develop new ideas. eEurope also wants to ensure the whole process is socially inclusive, builds consumer trust and contributes to social cohesion.

<sup>24</sup> Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions – “**Bridging the Broadband Gap**”.

### Community Initiative i2010:

#### A European Information Society for Growth and Employment

In June 2005, the EU Commission launched this five-year initiative to address the main challenges and developments in the information society in the years up to 2010 by emphasising ICT as a driver of inclusion and quality of life. This initiative corresponds to an overall strategy to modernise and mainstream all EU policy action instruments. It rests on three main pillars:

- To create a Single European Information Space, which promotes an open and competitive internal market for information society and media services;
- To strengthen investment in innovation and research in ICT;
- To foster inclusion as well as better public services (with initiatives eGovernment and eHealth) and quality of life (with initiatives such as Intelligent Car and Digital Libraries) through the use of ICT.

*For further information, visit <http://europa.eu.int/i2010>*

In March 2006, the EU Commission published a Communication to the Council entitled "Bridging the Broadband Gap", in which it argues the importance of ensuring that by 2010, broadband internet access is not limited to cities but available to all EU citizens including those living and working in less advanced areas. This raises the issue of the **territorial/geographical digital divide**. This Communication mentions the importance of broadband in terms of *eGovernment* (easing access to government services for citizens and businesses), *education* (online education in areas where instruction may not be available locally and access to educational resources) and *l rural development* (connecting farms and businesses to national and international markets, encouraging diversification, etc.) (COM(2006)129 final).

As far as the funding of infrastructure enabling the deployment of broadband technology within the EU is concerned, several EU Commission instruments are available to the Member States:

- **State Aid Rules:** the EU Commission looks favourably upon the use of State Aid to finance the development of broadband networks. Indeed, a number of public funding packages for broadband development projects in the Member States have received the approval of the EU Commission, which concluded either that the funding was compatible with EU State Aid rules or that it did not constitute State Aid (see boxed text below).
- **Structural Funds:** The EU Commission authorised M€ 210 in cofinancing for a broadband project in Greece arguing that this country was trailing the other Member States in terms of broadband access.
- **Rural development:** Through the Leader initiatives, the rural development policy has experimented with broader user of ICT to promote growth and employment in rural areas.

#### The Case of Pyrénées-Atlantiques, France, and Scotland & the East Midlands, UK: "State Aid Absent or Compatible"

"Regarding the project in the French department of Pyrénées-Atlantiques, the European Commission has decided that, under certain conditions, the public co-funding of an open broadband infrastructure constitutes compensation for the provision of a Service of General Economic Interest and hence is not State aid. In its assessment of the two projects in the United Kingdom, the Commission has found that the aid granted is compatible with EU rules since it is provided only to the extent necessary to develop the use of broadband services in deprived remote and rural areas."

*For further information, visit*

*<http://europa.eu/rapid/pressReleasesAction.do?reference=IP/04/1371&format=HTML&aged=1&language=FR&guiLanguage=en>*

However, the specific issue of the Universal Service Directive (Directive 2002/22/EC<sup>25</sup>) needs to be raised too. In 2005, the EU Commission launched a consultation process on the scope of the concept of "universal service". While putting forward the possibility of mainstreaming broadband access into this notion, it adopted a contrary position which went unchallenged and so was subsequently adopted. Swiss legislation however, does mainstream broadband into the notion of universal service. Indeed, the RFP for the next universal service concession (2007-2013) includes an obligation to make broadband accessible to all clients.

<sup>25</sup> Directive 2002/22/EC of the European Parliament and of the Council of 7 March 2002 on universal service and users' rights relating to electronic communications networks and services (Universal Service Directive). Visit <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:32002L0022:FR:HTML>

## 1.2 – The Norwegian Example

Initially, the Norwegian broadband delivery policy was adopted in response to the strong recommendations of the OECD and rested on the belief that this development would be essentially market-driven. Effective government action was expected to create strong demand, thereby making it interesting and profitable for private operators to develop and deploy broadband throughout the country. However, policy was adjusted following a realisation that the market alone was not willing to shoulder the risk of deploying broadband technology in mountain and sparsely populated areas. Thus, the Høykom programme (described on page XX) does not allow direct funding of infrastructure except in remote and sparsely populated areas.

On the other hand, Norway is implementing strategies that are rather similar to the EU's. For instance, beginning in June 2000 Norway carried out eNorway Plans (eNorway 1.0, 2.0 and 3.0) which amounted to a mere description of experiments conducted in the different Government departments. Then it launched eNorway 2005 in a second phase inaugurated in April 2002 with the aim of identifying federating principles and providing an overall policy framework. Finally, eNorway 2009 (developed in 2005) focuses much more on harnessing and leveraging the opportunities represented by ICT.

### **eNorway 2009, three target areas:**

- 1/ The individual in the digital Norway: everyone shall have the opportunity to participate in the information society; digital services shall be adapted to the needs of the individual;
- 2/ Innovation and growth in business and industry: Norway must increase its development and value creation from knowledge-based business; the public sector and large and small business also need to better leverage the opportunities created by information technology;
- 3/ A coordinated and user-adapted public sector: the Government has two overall goals in its modernisation process: facilitating interactions between the general population and the authorities and freeing up resources that can strengthen the welfare state; ICT is a powerful tool that can contribute to achieving these goals.

*For further information, visit [http://www.odin.dep.no/filarkiv/254956/eNorway\\_2009.pdf](http://www.odin.dep.no/filarkiv/254956/eNorway_2009.pdf)*

## 1.3 – The Austrian Case

In Austria, telecom was a State monopoly until 1993, when the country started liberalising the industry as part of preparations for EU accession. The regulation governing the sector is the Telecommunications Act of 1997, which established the concept of universal service. This principle did not apply to broadband however and since a growing gap was in evidence between rural and urban areas in terms of broadband access, the Federal Ministry of Transport, Innovation and Technology adopted in 2003 a financial scheme supported at Federal level and by Provincial authorities and co-financed by the EU Structural Funds to stimulate broadband development in remoter rural areas (Breitbandinitiative<sup>26</sup>).

Given the broadband coverage deficit observed in their mountain areas, the Länder of Carinthia and Tyrol – studied as part of the Pusemor project<sup>27</sup> – launched projects to improve broadband coverage and take-up. In Carinthia, ICT hardware was installed in local government offices and made available to municipal services and citizens alike. This is an interesting initiative aimed at promoting the use of ICT and eGovernment.

## 1.4 – Specificity of Mountains? The French Case: The Rhône-Alpes Strategy

Seventy-three percent of the territory of the French region of Rhône-Alpes are mountain areas. Therefore, the regional authorities decided in March 2004 to launch a specific call for projects on "ICT and Networking of Mountain Area Development Stakeholders" as part of the PRAI (*Programme Régional d'Actions Innovantes*, "Regional Innovative Actions Programme", RIAP) (see boxed section below).

The Rhône-Alpes Region is a textbook example of the paradoxical situation facing mountain areas when it comes to ICT: although they stand to benefit most from the deployment of ICT (in terms of faster and easier access to many resources), the spontaneous trend is toward increased ICT penetration in urban centres that are very powerful already. Thus, evidence points to a worsening of existing disparities. Mountain areas are facing a growing gap and are increasingly vulnerable.

<sup>26</sup> Visit <http://www.bmvit.gv.at/telekommunikation/breitband/index.html>.

<sup>27</sup> For further information about Interreg Project Pusemor, visit <http://www.pusemor.net/>.

**Projects in Rhône-Alpes under the Regional Innovative Actions Programme (RIAP)  
"ICT and Networking of Mountain Area Development Stakeholders"**

In order to ensure adequate coverage of expectations in terms of mountain area activities and populations, three fields were identified:

- 1/ human services;
- 2/ economic development (micro-enterprises, crafts and the professions);
- 3/ tourism.

Particular attention went to considering stakeholders as well as their roles and networking. Gender equality was also identified as an important theme for this programme.

The budget of the programme (2004-2007) amounts to €6 million, breaking down into 50% EU funding, 25% regional appropriations and 25% project partner match funding. 28 mountain area projects were selected and funded this way.

*For further information, contact C. Barassin, Project Coordinator ([cbarassin@rhonealpes.fr](mailto:cbarassin@rhonealpes.fr))*

The study conducted by the Rhône-Alpes Region under the euromountains.net<sup>28</sup> project showed that broadband coverage of the *Pays d'Albertville* (Albertville region, a high-mountain area) requires new technological solutions due both to the area's topography and to long distances between its hamlets and France Télécom's splitters. Therefore, coverage will be provided over the fibre optics network installed on EDF<sup>29</sup> power lines. The power grid management company RTE (*Réseau de Transport d'Electricité*, "Power Distribution Company") will be responsible for this task. The equipment itself will be financed by the Department, which will lease it to the broadband network operator.

## 1.5 – Presented schemes

### 1/ *Cybercantal II*, Cantal, France

page 27

*This project was launched in 2004 to include the French department of Cantal in the worlds of IT, broadband internet, and more generally ICT. It aims to provide the general population with an access to these services of general interest.*

### 2/ *Telecottages*, Hungary

page 31

*Outside the Hungarian capital, Budapest, access to IT services and internet connections is poor in the country, especially in rural areas. Initiatives called "telecottages" have therefore been launched to close the gap between the capital and the rest of the country and deliver internet access in villages. Telecottages are points of access to information technology. They support a broad range of services with equipment including computers, email access and other office solutions.*

### 3/ *SAB-Microsoft Partnership*, Switzerland

page 35

*Transfer Tecnologic Surselva is a pilot project delivered on behalf of the Swiss Government by the Swiss Grouping of Mountain Areas (SAB), Microsoft Switzerland, Surselva (an association of municipalities) and local project leaders between May 2004 and June 2008. Its aims include leveraging ICT to support the sustainable promotion of structural mountain area development and the consolidation of regional quality of life and jobs.*

### 4/ *The Høykom Programme and eGovernment*, Norway

page 39

*HØYKOM is a major framework programme that encourages and supports the implementation of time-limited local projects. HØYKOM helps with the development and enhancement of broadband internet-based eGovernment activities among a large number of public institutions in several sectors (education, health and social services) and at all levels of public administration.*

### 5/ *ICT Training in Rural Areas*, Basque Country, Spain

page 43

*The Emalor project launched in 2004 seeks to address the need for basic ICT training identified among women in rural areas of the Autonomous Community of the Basque Country in Spain. This training is mainly geared toward areas where ICT training is either unavailable or ill-adjusted. It combines e-learning and classroom training with professionals. The project includes three training modules.*

<sup>28</sup> Interreg IIIC Project 2004-2007. For further information, visit [www.euromountains.net](http://www.euromountains.net).

<sup>29</sup> EDF: Electricité De France.

## 2/ Postal Services and Their Accessibility

### 2.1 – EU Context

In 1997, the EU started taking necessary measures to complete the single market in the postal sector with a view to its complete liberalisation by 2009. For this purpose, the EU developed common rules for the provision of postal services within the Community to preserve the guarantee of universal service provision.

According to the Postal Directive, the EU Commission was to confirm in 2006 whether the postal reform could be further pursued, including the initiation of the last stage of the reform culminating in the complete liberalisation of the sector in 2009 in accordance with the Directive. The 1997 Framework Postal Directive explicitly invited the EU Commission to submit in 2006 a prospective study ascertaining whether completion of the single market was possible while maintaining universal service provision.

Therefore, the EU Commission consulted extensively with all stakeholders between 2004 and 2006. It also commissioned PriceWaterhouseCoopers to undertake a prospective study<sup>30</sup> on the impact of this liberalisation on universal service provision. This study describes the aims of the reform and the present state of postal services and future market trends, assesses the potential impact of a liberalised market and finally recommends flanking measures. In its own report, the EU Commission stated that recent analysis indicates that there has been a satisfactory level of development of universal postal services in Europe: universal service is of high quality, prices are affordable, access to services is easy, and many operators make substantial profits.

**Report from the Commission to the Council and the European Parliament (Oct. 2006)  
“Prospective study on the impact on universal service of the full accomplishment of  
the postal internal market in 2009”**

***Some thoughts about the universal service obligation and access in remote areas***

- The EU Commission underscores that in line with the principle of subsidiarity, the Directive provides a broad definition of universal service and that derogations are permitted in exceptional circumstances (e.g. reducing delivery frequency to very remote areas).
- Expected disadvantages in terms of access to postal services include: “in remote areas, access may be affected, which may imply the need for assisting measures if insufficient alternatives are offered by universal service providers and other market actors”.
- Impact on territorial and social cohesion: “To the extent that universal service providers fulfil a social role, they may have to request adequate financial compensation. Appropriate answers should and can be found at national level, where such claims can best be assessed and the appropriate answer in terms of financing can be given” (see examples in France and Norway)<sup>30</sup>.

*For further information: COM(2006) – official numbered version not available at present*

Sweden and the UK have already liberalised. Finland, Germany and the Netherlands will all have opened up their postal markets before the EU deadline and are keen for others to follow suit. But other EU members, including France, Italy, Spain, Greece, Belgium and Poland, fear that full liberalisation would destroy their part-monopolies, causing thousands of job losses and weakening customer service (EurActiv, 19/10/2006<sup>31</sup>).

The new Commission proposal for a Directive would allow Member States to finance the cost of providing a universal service in the way that best suits their particular situation, so long as it does not distort the market. Possible financing alternatives include direct state subsidies, cross-subsidisation from profit-making to loss-making activities or the creation of a compensation fund through the introduction of fees on new service providers or users. (EurActiv, 19/10/2006<sup>31</sup>).

<sup>30</sup> *The impact on universal service of the full market accomplishment of the postal internal market in 2009*, PriceWaterhouseCoopers, 2006. Website: [http://ec.europa.eu/internal\\_market/post/studies\\_en.htm#sector2006](http://ec.europa.eu/internal_market/post/studies_en.htm#sector2006).

<sup>31</sup> Visit <http://www.euractiv.com/en/innovation/member-states-prepare-mail-battle/article-158899>.

## Overview of progress and future programmes in connection with EU legislation and discussions on postal services as of 30/11/2006:

- 1999: Framework Postal Directive 97/67/EC. Launch of the first stage of postal service harmonisation.
- 2002: Amendment of Framework Postal Directive 2002/39/EC scheduling a two-stage market-opening process: 01/01/2003 for mail weighing 100+g and 01/01/2006 for mail weighing 50+g. Delivery of mail below 50g is not liberalised.
- 01/2006: Public consultation on postal services.
- 18/10/2006: Presentation by the EU Commission of the new Draft Directive on Postal Services aiming for liberalisation by 2009.

### Coming:

- 2007: The European Parliament and Council will examine this new Draft Directive on Postal Services.
- 2009: Liberalisation.

## 2.2 – Some Data About Switzerland

In Switzerland, the postal services market was liberalised step by step. In 1998, the old PTT (*Poste et télécommunication*) was split into two independent organisations: *Swisscom SA* and *La Poste*. Legally, the Confederation has to own at least half of *Swisscom*. It originally owned 64% but is selling stock to reduce its share to the minimum legal requirement (50% plus one share). In 2006, a Federal Government attempt to change the law to allow a complete privatisation of *Swisscom* was thwarted by an alliance between trade unions and mountain areas. Universal postal service provision is defined in the Law on telecommunication and implementing legislation. In 2006, the Federal Parliament approved the principle of competition for the "last kilometre" (access to the copper cable – equivalent to "local loop unbundling"), which was the last remnant of *Swisscom* monopoly. However, full liberalisation of bitstream – i.e. including broadband – access was denied by the same alliance of trade unions and mountains areas.

*La Poste* is wholly-owned by the Confederation. It is an autonomous government-owned corporation. Universal service provision is described in the Law on Postal Services and implementing legislation. Market liberalisation is conducted in stages. In 2004, *La Poste* lost its monopoly on packages. On 01 April 2006, the reserved service limit for mail was reduced from 2kg to 100g. A further reduction of this limit will be discussed in 2007, as well as a possible privatisation of *La Poste*.

So, the Swiss Confederation decided to progressively liberalise its postal services as early as in 1998. *La Poste* is required to be profitable. This was the reason for the restructuring of its distribution network initiated in 2001 and completed on 31 May 2005. As of June 2005, its network included 3,525 offices, compared with 3,396 in 2001. These include 1,767 traditional post offices, 657 subsidiaries, 126 agencies, 7 mobile post offices and 968 home service schemes. Optimisation of the remaining network is ongoing as part of the Ymago project (see the Ymago project study on page XX).

In parallel, six new large distribution centres have been built to shoulder the bulk of the mail sorting workload. These centres are installed both in lowland and mountain areas.

The reorganisation of post offices triggered numerous reactions. To support its decision-making process, *La Poste* commissioned a user survey. Criticism was expressed regarding post office opening hours and half of the respondents indicated that home services were not convenient. Then in April 2002, an expert group (comprising representatives of the Cantons, municipalities, mountain areas and consumers) analysed the results of this survey and made several recommendations including more flexible opening hours as well as the need to find regional solutions and to improve consideration of the requests of municipalities. On the other hand, the expert group concluded that home services did not constitute a balanced solution.

## 2.3 – Presented schemes

### 1/ In France: Regulation of Postal Service Delivery

page 47

*Regulation of postal service delivery is examined from the point of view of optimum access to the postal network. For the purpose of this discussion, several pieces of legislation need to be considered. By identifying the relevant proposals contained in each of them, this study reveals the uniqueness of the "multi-legislative" approach to postal network management.*

## **2/ In Switzerland: the Ymago Project**

**page 52**

*In 2001, La Poste started reorganising its network of post offices. This first wave of restructuring was more or less decided by La Poste itself, which caused a lot of criticism from concerned people and municipalities. Since 2005 therefore, La Poste has considered further changes to its network in close consultation with different stakeholders. This process is known as the Ymago project.*

## **3/ Training in Primary and Secondary Schools and in the Business Environment (In-service Training, Apprenticeship, etc.)**

The NordRegio report (2004) emphasises that a number of EU15 and accession countries – including Greece, Austria, Portugal, Italy, Spain, Slovenia, Bulgaria, Romania and Slovakia – have a significant proportion of universities close to the edges or even within mountain areas.

When renewing the Lisbon Agenda in March 2000, the acknowledged importance of the knowledge-based economy encouraged the EU Commission to address the modernisation of education and training systems within the EU. A joint Work Programme was adopted by the Council and Commission in 2002. This document set out the work programme to be completed in order to meet the 13 objectives identified for education and training systems in Europe. One of these objectives consisted in "Supporting active citizenship, equal opportunities and social cohesion". The document underscored that the Member States have to consider the needs of vulnerable groups, in particular people living in rural or remote areas<sup>32</sup>.

In a Communication of November 2005 (COM(2005)549), the Commission provided an overview of progress towards modernising these systems. It pointed out that the objectives linked to social inclusion were far from being achieved. It felt that in order to be efficient and equitable, reforms had to be undertaken through partnerships at all levels. It also mentioned that the Structural Funds must be used more judiciously with regard to investment in human capital.

### **3.1 – Presented schemes**

Worth noting is that all schemes refer to ICT as a training or awareness-raising tool or as a means of promoting inclusion.

#### **1/ Online MSc "Managing Sustainable Mountain Development", Scotland**

**Page 56**

The Perth College Centre for Mountain Studies was set up in 2000. Perth College is a partner of the UHI Millennium Institute, the only higher education institution in the Highlands of Scotland, which will become the University of the Highlands and Islands within the next few years. This organisation delivers university-level training and research in partnership with 14 Colleges and Research Centres as well as about a hundred Learning Centres throughout the region. In 2004, UHI developed a new Master of Science (MSc) on "Managing Sustainable Mountain Development" delivered online over the Internet.

#### **2/ Social Inclusion of Women Through ICT Training in the Bugey Area, France**

**Page 59**

This project implemented between September 2004 and September 2006 in the Bugey area (Department of Ain) familiarised groups of volunteer women with computer and internet skills.

#### **3/ Transnational School Project Within the Framework of a Leader+ Initiative**

**Page 63**

This project specifically targets rural schools with 2 to 3 teachers, the facility in geographical linkage in order to maximise resources, cooperation and learning and the selection of schools in disadvantaged areas.

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<sup>32</sup> Source: Official Journal of the European Communities – Council: *Detailed work programme on the follow-up of the objectives of Education and training systems in Europe* (2002/C 142/01).

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- **Europa, the EU Portal** – Europa Website ([http://europa.eu/index\\_fr.htm](http://europa.eu/index_fr.htm)) visited in August 2006.



- **SAB** – Groupement suisse pour les régions de montagne (*Swiss Grouping for Mountain Areas*) – section of the SAB website dedicated to the PUSEMOR project (improvement of public service provision): <http://www.sab.ch/PUSEMOR.283.0.html?&L=2>  
Publication on public service in Switzerland: *Défi service public: les options pour la Confédération, les cantons et les communes* (“the Public Service Challenge: options for the Confederation, Cantons and Municipalities”), August 2003: <http://www.sab.ch/index.php?id=64&L=2>

## Part 3: the projects presented

The choice of the experience sheets has been guided by the feedback of the Euromontana members during the allotted time, according to their diversity, heterogeneity, or complementarily, and is not meant to be an exhaustive list of the most relevant experiences. These experiences all have their specific characteristics and are hardly transposable as they are. On the other hand, they can point out a new aspect which may find an application in a locally conducted debate. These fact sheets should describe the main aspects of each experience and to this end we have chosen to adopt the format proposed by DIACT in France. For each experience, the data of the responsible person/organisation are provided so that you can study in depth the points which interest you. As you can see, some experiences are very local, others are of national scope. Either one or the other type can bring about an opening to new and useful approaches.

### **1/ The methodology of DIACT**

#### **A – Presentation of the project**

- Persons targeted
- Objective of the project

#### **B- Context**

- The region: characteristics of the implementation zone (area, economic data)
- The process of the structure's creation: is the project based on previous experience?
- What is the role / impact of this project? How is the project structured (judiciary, political framework, local organisation)?

#### **C – Functioning**

- Who supports the structure?
- Who are the partners?
- How is the partner network organized? Is there a network organization?

#### **D – Assessment**

- Budgets and resources
- Staff
- Results and evaluation
- Perspectives

#### **E – Bibliography**

## Summary of the experiences presented

<b>The Cybercantal II in France .....</b>	<b>27</b>
<b>The <i>telecottages</i> of Hungary.....</b>	<b>31</b>
<b>The partnership between SAB and Microsoft and Switzerland.....</b>	<b>35</b>
<b>The Høykom programme and the Norwegian eGovernment.....</b>	<b>39</b>
<b>ICT training for the rural zones in the Spanish Basque Region.....</b>	<b>43</b>
<b>Regulation of postal activities in France.....</b>	<b>47</b>
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## The Cybercantal II in France

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### A – Presentation of the project

This project was set up **in 2004** in France in the Cantal department (15) in order to integrate it into the world of computing, broad band Internet and all the Information and Communication Technologies (ICT). Its aim is to guarantee access to these public interest services for the largest number of people.

#### People targeted

The CYBERCANTAL II plan includes three sections, one for each type of population:

- **The objective of the "general public" Cybercantal** is to offer a neighbourhood service adapted to the needs of the population. In that connection, the General Council wants to propose a "Digital Work Space" (E.N.T) to the technical high school students of Cantal. It will be accessible from the classroom via the Web, the home and/or the resource centres and will allow access to innovative educational services (classes, exercises, multi-media documentation). This electronic desk (or virtual office) is an innovation which will be set up in the next three years.

- **The Cybercantal "regions"** want to open the Cantal to electronic administration, thanks to the installation of one terminal per canton connected to broadband, so that the greatest number of people has access to these services. One site per canton (Public Services Administration - MSP, Town Hall, Community Halls, Cybercantal Resource Centres<sup>33</sup>) is thus equipped with a terminal connected to broad band. For this reason, the maintenance and optimisation of public interest services are essential issues for the department.

- **The aim of the Cybercantal "businesses"** is to facilitate the development of the companies through e-trade which represents a real development opportunity for some of them.



#### - Objective of the project

The CYBERCANTAL II project started in 2004. It has a two-fold objective:

- on the one hand, it allows the people of Cantal **to appropriate the ICT** (Information and Communication Technologies) by putting these ICTs (Computing services, broad band Internet) at their disposal.
- But this is not enough: one has to encourage **the use of ICT**, so the second objective is to offer concrete applications.

<sup>33</sup> The MSP welcomes all CyberCantal regions dedicated to public services, the ICT being only a tool. On the other hand, the resource centres are exclusively oriented towards the use of ICT as such.

## B- Context

### The regions

The Cantal is located **in the centre of France** and constitutes the south-west part of the Auvergne region. This department is **very rural** due to its particular geographic and economic characteristics. Indeed, the Cantal range has a circumference of about 100 kilometres diameter and covers nearly 570,000 hectares; extinct volcanoes occupy the centre. Many rivers have given birth to the valleys.

The high plateaus (called Planezes) are located between these valleys. The altitudes vary, starting from 218 meters in the Lot valley. The Aurillac Basin is located at about 600 meters. The summer pastures are situated at a height of 850 to 1,450 meters.

The soil being of volcanic origin, **extensive agriculture** prevails (summer grazing land); it is a region devoted to fodder production and specialized animal husbandry or double herds (milk and nursing). The Cantal is therefore a **pasture department**: full-time grazing land and temporary meadows constitute 95% of the total agricultural area. Cereal production is used for cattle feeding.

Agriculture is therefore an essential activity of the department, employing 1/5 of the work force, which means 4 times more than at the national level. It also generates many jobs in the food processing industries and services.

### Creation process

The Cybercantal project, initiated in 1998 by the General Council, has allowed every technical high school and some other places to have access to ICT equipment and complementary resources. While based on a cantonal structure, the first version (regarding the organisation in the concerned regions), has experienced real success and has been awarded the label "Espace Public Numérique" (EPN)<sup>34</sup> later Netpublic. Later, considering the evolution of the techniques and the changes in behaviour in regard to the New Technologies, it became necessary to launch a second phase of this project: CYBERCANTAL II, which dates from 2004 and is based on the first version.

### Role of the project

This global feature offers to demythologize computer technology which is often perceived as complicated by the elderly and non-initiated.

## C – Functioning

### Who supports the project

The General Council of Cantal is interested in ICT which it considers a tool to make broad band Internet accessible to the greatest number. **The ICT are therefore the powerful element of a development dynamic** which the General Council has totally devoted itself to in the last several years. These efforts are translated by the installation and coordination of the Cybercantal plan (Digital Public Spaces, Digital Work Environment, Electronic Administration) as well as the deployment of telecommunication infrastructure (Mobile Telephony and Broad Band).

### Partners

The Agency for the Development of Electronic Administration (L'Agence pour le Développement de l'Administration Electronique - ADAE) has developed a "service-public.fr" portal which allows every citizen to access administrative processes from their home through the Internet. It is integrated through a co-marking agreement at the Department portal and distributed locally.

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<sup>34</sup> **EPN**: Espace Public Numérique: According to the Delegation of Internet Usage (Delegation aux Usages de l'Internet -DUI) - attached to the Ministry of National Education, of Higher Education and Research (ministre de l'éducation nationale, de l'enseignement supérieur et de la recherche (MENESR) – an EPN is "meant for the general population and offers to its users various guided activities, not only through collective workshops, but also in the framework of individual sessions and time reserved for free browsing". Since November 2003, the former label EPN is not allocated anymore and the direct label State-spaces (Public Digital Space -Espaces Publics Numériques - EPN) has been abrogated. It has been replaced by the Charter and NetPublic label and by "État-collectivité territoriale", a common label which has the advantage of recognizing the major role of the local institutions in the politics of public access to the Internet. (see also the site of the DUI:<http://delegation.internet.gouv.fr/netpublic/index.htm>)

In the framework of the Cybercantal section "Regions", for the setting up of terminals connected to broad band, a partnership with the C.A.F (Caisse d'Allocation Familiale), the A.N.P.E. (Agence Nationale Pour l'Emploi), the C.P.A.M. (Caisse Primaire d'Assurance Maladie), the U.R.S.S.A.F. (Unions de Recouvrement des cotisations de Sécurité Sociale et d'Allocations Familiales), the U.D.A.F. (Unions Régionales des Associations Familiales) and the E.D.F. (Electricité De France) has been developed so that all the online services are accessible through a unique departmental portal.

### **Organization of the network**

For the Cybercantal "regions" plan of one terminal per canton, the municipal and/or inter-municipal staff will be trained to assist users. This plan is accompanied by assistance for the installation of video screening. The municipal communities who wish to can thus be provided with video screening infrastructure and in this regard the General Council offers a grant of 50% of the total expenses for one facility per canton.

***Training sessions for the local authorities and civil servants have also been held.***

## **D – Assessment**

### **Budget, resources**

For each phase of the CYBERCANTAL II plan, some assistance has been provided.

- For the **"general public"** Cybercantal, the hiring of a coordinator is matched by a grant under the category of the Employment Help Plan of the General Council (specifically, 8,000 euros the first year, 6,000 euros the second year and 4,000 euros the third year). Furthermore, the collectivity "employer" benefits from financial aid from the General Council up to 50% for any travel expenses incurred in the course of their mission. Also, to insure better follow up, the General Council meets all the coordinators every three months to assess their activities. In short, financial aid has been provided, allowing follow-up of projects up to 50% of the amount, limited to 15,000 euros.

-The General Council also wants to encourage **"the regions"** to organise events with recreational or educational objectives. To this end, it can provide financial aid up to 50%, limited to 5,000 euros.

- Finally, concerning the last section, Cybercantal **"businesses"**, the General Council wants to help the emergence of such initiatives with a contribution of 50%, limited to 10,000 euros in the framework of the PACTE CANTAL (CANTAL AGREEMENT)<sup>35</sup>. At the end of the last one, the General Council decided to renew the Cybercantal "E-Trade" Business subsidy.

### **Staff**

In order to encourage the use of these services (especially in the framework of the "regional" section) and to increase social interaction, a multi-media coordinator is hired: s/he accompanies, initiates and assists everyone to master and successfully employ these tools and services offered by Internet and more generally by the information and communication technologies at these terminals. Via this terminal, people can fill in their tax return on Internet, do their shopping, follow video-conferences...always guided by a multi-media coordinator, which ensures the creation of a job.

### **Results and evaluation**

**The 23 technical high schools and Cybercantal** resource centres are already equipped and have access to broad band. Indeed, to respond to the expectations of National Education, the General Council installs and finances broad band Internet connections in all the technical high schools: 19 of them located in towns equipped with SDSL could be connected. For the other 2, the department opted for a solution involving a bi-directional satellite successfully tested at the Allanche Technical School.

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<sup>35</sup> **Pacte Cantal:** it is an agreement for economic development and employment directed at the industrial, traditional and commercial fabric of the Cantal. This agreement was signed in 2001 in partnership with the State and Regional Council of Auvergne. This new action plan lasted three years. (See also the site:<http://www.cantal.com/cgi-bin/news/journal.cgi?folder=journal/2001-02&next=34>)

Today, the technical schools and Cybercantal centres are all equipped with Broad Band.

### **Perspectives / innovations**

To ensure the deployment of **broad band** over the whole region, the General Council has launched three types of partnerships:

- The "Innovative Department" agreement

On April 7th, 2004, the General Council has signed an agreement with France Telecom aimed at accelerating the deployment of Broad Band over the region with the objective of having 94% of the population connected at the end of 2006. Thanks to this project, 86% of the population is already connected.

- "WIMAX "

The General Council went into partnership with the Auvergne region, to cover the 4% of the population not "ADSLisable" with Wimax technology (radio waves).

- "Digital Highway A75"

The General Council of Cantal has created a joint commission charged with the construction and operation of an optical fibre line along the A75. This will allow a very high bit rate to be provided to the department as early as 2007.

Moreover, regarding **mobile telephony**, the coverage is extended. After identifying the "non-agricultural zones" in 2002 - 2003, the first phase of equipment has been installed in 2005. This first phase, involving 34 out of the 80 towns not yet connected, covers the regions identified by the State as having priority. Financially, the department pays for installing the towers. It's likely to benefit from subsidies from the State, FEDER (Europe) and the Region up to 50%. The General Council has voted 4 million euros for the financing of this programme.

For the remaining 44 towns (phase 2), they are to be paid for by the operators.

The objective is that 100% of the centres-towns are covered by mobile telephony by the end of 2006 - beginning 2007!

Finally, we conclude by presenting the new portal (**cybercantal.org**) devoted to the cybercantal project and the innovations proposed in this framework. We can begin by summarizing a new concept: **the Bus.Net**, connected to broad band Internet: it is a multimedia bus which has just finished being equipped and which will now criss-cross the Cantal to offer everyone access to Internet and the new technologies, wherever they are. This bus includes a computerised, self-service space with 5 computers equipped with an LCD screen, connected to broad band Internet (100 Mbits/s) through a mobile satellite antenna (automatic detection of the satellite through GPS) or cable network. At the rear of the bus, a classroom and presentation room, equipped with a projection screen and video projector can accommodate a dozen people. Finally, a relaxation space has been installed at the front of the bus. All this has an internal sound system.

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- For the Net Bus: for information contact LAPORTE Ludovic (Managing Information Director of the CABA): 04 71 46 86 30 ([l.laporte@agglo-aurillac.org](mailto:l.laporte@agglo-aurillac.org))
- For information on the Cantal region: see the site of the Agricultural Council of Cantal: [http://www.cantal.chambagri.fr/refpac/imprimersans.php3?id\\_article=2042](http://www.cantal.chambagri.fr/refpac/imprimersans.php3?id_article=2042) (July 19th, 2006)
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- For information on CyberCantal: contact Fabien Miedzianowski, Director of the Systèmes d'Information, des Technologies et d'Appui aux Collectivités au Conseil Général du Cantal: 04-71-46-22-02.

## *The telecottages of Hungary*

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## **A – Presentation of the project**

Besides Budapest, capital of Hungary, the Hungarian region and especially the rural areas are poorly covered by computer services and Internet connection is difficult. Therefore, initiatives have been launched to fill this gap between the capital and the rest of the country and bring Internet access to the villages. They are the telecottages. A telecottage is a point of access to information technology. It offers a series of services with equipment like computers, e-mail access and other office equipment.

### **People targeted**

The telecottages set up in Hungary are meant for the population and particularly for the people living in isolated areas. More generally, this project is meant for all information technology users in Hungary.

### **Aim of the project**

This project intends to provide access to information technology, especially Internet, to isolated populations, by setting up access points spread over the whole region.

## **B- Context**

### **The region**

Let us start with some demographic data. Hungary has **10 million inhabitants** (2001 census). The country is divided in the following manner: Budapest which is the capital, 23 towns of departmental status and 19 non- urban departments.

Hungary has more than **3,000 small villages** and 7.8 % of the population lives in rural settlements of less than 1,000 inhabitants.

Furthermore, it is interesting to see how the communication network is organised in Hungary. In 1993, a Telecommunications Act has allowed the establishment of a regulating system. The General Inspection of Telecommunications was thus established following the merging of the Post and Telecommunications Agencies and the Institute of Frequency Management. In 1995, the General Telecommunications Agency took the name of Communication Authority or HIF ([www.hif.hu](http://www.hif.hu)). Among other things, it is charged with supervising and regulating the telecommunications and postal markets. The budget of HIF is created from tax revenues for utilisation of the frequencies and computer equipment.

### **Creation process**

In 1994, a group of Hungarian librarians started to **provide computer services and Internet access to small communities essentially located in the rural and isolated zones of the country** (including the hilly areas), where the libraries and cultural centres are small and have limited resources. It is therefore difficult for them to develop by acquiring new functions or by providing more services.

The first telecottage, called **TeleHaz**, has been created in 1994 in Czakbereny, a mountain village in the centre-west of Hungary. Funding was provided by the local government, the business sector and the Ministry of Social Affairs.

At the end of 1994, 50 individuals representing various professions created the **Hungarian Association of Telecottages** (see the site [www.telehaz.hu](http://www.telehaz.hu)).

### **Role of the project**

The telecottages fulfil two important functions in Hungary: **the spreading of Internet and the creation of jobs.**

## **C – Functioning**

### **Who supports the project**

This project was supported by the **UIT (International Union of Telecommunications)** which is the international organisation in the United Nations in which the States and the private sector coordinate the networks and global telecommunication services. The headquarters is in Geneva, Switzerland.

### **Partners**

This project has been financed by **the local Hungarian communities, the businesses, and the Ministry of Social Affairs**. It also got backing from the **Democracy Network** (DemNet) financed by USAID and the support of the Hungarian Prime Minister. Indeed, the Director of the USAID-funded "DemNet" Programme has launched the subsidy offers for setting up more telecottages in as short a time as possible. Because of this, between 1997 and 1998, 31 new telecottages have been created, for a total of 1.5 million U.S. dollars.

### **Organization of the network**

A telecottage provides computer services thanks to set-ups including computers, e-mail access and other office equipment. There are on average five PCs per telecottage, each one having its own e-mail server. Once registered, the users can access their free e-mail service in less than two hours with a personal e-mail address indicating the name of the user and the village involved (for example: name.village@telehaz.hu). Each telecottage also has "tele-work" means at its disposal.



## D – Assessment

### Budget, resources

Usually, one has to spend at least **15,000 USD (US Dollars)** to set up a telecottage and the annual operating costs are similar. On the other hand, after two years of functioning, if there is a satisfactory network service and a certain degree of entrepreneurship, **a telecottage can be self-sufficient** thanks to at least four income sources, which are:

- the rights paid for the local services (for example, office services, local media and teaching),
- subsidies and donations,
- business services (commercial trade via the net, tele-teaching and tele-work),
- and the providing of public sector or local administration services on the basis of subcontracting (for example, social services, regional development and dissemination of public information).

### Staff

One of the objectives of telecottages is the creation of jobs. Indeed, at every access point a coordinator is present to guide, advise and help the clients.

### Results and evaluation

Each telecottage can provide for a maximum of 10,000 people. Now, the number of people varies between 4,000 and 6,000 per telecottage.

In 2001, there were about 300 operating telecottages in the country. The present number of telecottages can serve around 1 million Hungarians.

Today, **more than 400 telecottages** are in service and many others are being developed. By 2007, 800 telecottages are expected to be scattered throughout the country.

### Perspectives and innovations

There is at least **one telecottage every 50 kilometres**. And more and more small villages have set up simple access points with a few computers and a telephone line. **These "satellite" telecottages** have electronic access to the nearest telecottage; therefore, they benefit from the services that it can provide without having to invest in infrastructure or equipment.

**Other forms of access to Internet are being developed**, starting from the cafes offering Internet connection. The number of these **cybercafes** is increasing in Hungary, but their use is not very widespread among the Hungarians and most of the customers are foreigners. Even so, cybercafes try to sell their services by offering various activities and products. Using the Internet costs between 300 (US\$ 1.05) and 900 HUF (US\$ 3.16).

Another interesting point: **mobile Internet**. Access services to mobile Internet using the wireless network or WAP (Wireless Access Protocol) were launched in Hungary in the years 2000 by Westel (a company specialised in international calls) and Pannon.

The Hungarian Association of Telecottages has created a tele-work plan involving the gathering and dissemination of public information. Indeed, most of the public institutions do not have the funds or resources to start their own information programme for consultation on Internet. Through the public works plan, the State covers 70 - 90% of the "public employees" salaries. Therefore, the telecottages appeal to the public agencies and offer to gather and disseminate their information in exchange for covering 10 - 30% of the remaining salaries. This constitutes an opportunity for the public agencies to publish their information at a lower cost and is an effective employment programme through tele-work.

The local call rate is one of the recurring problems for the telecottages. They have to pay the LTO<sup>36</sup> (Linear tape-Open) or the existing operator in order to use the phone and connect to Internet. For these reasons, the Hungarian Association of Telecottages wants to create its own micro-wave system, especially since the cost of these systems is decreasing rapidly. 3,000,000 Hungarian forints<sup>37</sup> (HUF) are necessary for each telecottage. As each telecottage is stable, the installation of an antenna is enough. The 50 kilometres between each telecottage can be covered by the waves, thus allowing them to be linked together.

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- Site of the Hungarian Association of telecottages: [www.telehaz.hu](http://www.telehaz.hu)
- People I tried to contact (they all participated in this study):
  - Tim KELLY (tim.kelly@itu.int => in English),
  - Michael MINGES (Michael.Minges@itu.int=> in English)
  - Lara SRIVASTAVA (lara.srivastava@itu.int => in English) (all three are in UIT)
  - Jozsefne PERGEL (pergel@hif.hu) (of the Hungarian Communication Authorities).
- Report on *Internet in a transition economy* – by ITU (International Telecommunication Union) – April 2001.

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<sup>36</sup> LTO (Linear Tape-Open): the LTO products offer performance, reliability and high capacity and are provided by suppliers of multiple technologies. (See the site: [www.lto.org](http://www.lto.org))

<sup>37</sup> Exchange rate: 1 euro = 261.51 HUF

## ***The partnership between SAB and Microsoft in Switzerland***

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### **A – Presentation of the project**

Transfer Technologic Surselva is a pilot project conducted **between May 2004 and June 2008** by the Swiss Group for the mountainous regions (SAB) Microsoft Switzerland, the association of Surselva municipalities and the local project supporters. Its aim is to promote, in a sustainable way, the structural development of the mountainous regions and to perpetuate the region's living standard and employment by involving the ICTs.

#### **People targeted**

This project targets **youth**, individuals **and companies**; its scope **of action** is therefore wide-ranging.

#### **Aim of the project**

The objective of the organisers is to jointly present the potential and the opportunities offered to Surselva by the technologies related to Internet and communication.

The concept of the SAB/Microsoft Switzerland project can therefore be divided into two main points:

- To ensure the **availability** of the ADSL/broad band service in Switzerland, as well as the appropriate infrastructure. Therefore it is about making an appropriate and functional service available.
- To promote the **use** of this service or of the new means of telecommunication in the mountainous regions, which means to increase competitiveness.

### **B- Context**

#### **The region**

The mountainous regions in Switzerland are presently undergoing heavy restructuring, leading to a loss of skilled employment. Therefore, the youth have few development prospects in these regions and aspire for high level training adapted to the requirements of the time, with jobs at the end. Jobs fulfilling these criteria are rare in the mountainous regions, which explains the "brain drain", that is, the departure of a highly skilled population and as a consequence, the loss of a potential for innovation.

Moreover, in Switzerland, it is estimated that 98% percent of potential customers are interested in using computer services, but only 37% are actual users.

#### **Creation process**

In 2003, Microsoft Switzerland and SAB signed a 2 year cooperation agreement. Following the success in the first Surselva region, the cooperation has been extended until 2008.

#### **Role of the project**

So it was **in 2004** that the common project started, with the aim of creating awareness of the perspectives and opportunities offered by computer technology. In the framework of this campaign of regional sensitization, the association of Surselva municipalities has decided to make a technologic transfer.

## C – Functioning

### Who supports the project

We have seen above that this project was based on a partnership between the Swiss Association for the Mountainous Regions (SAB) and Microsoft Switzerland. This partnership is being implemented in selected regions by regional players. For the first region, it is **the association of Surselva municipalities** which intervenes as responsible regional organisation **and assumes the role of main supporter of the project** with the two associations «formaziun – bildung – regiun surselva» (trade schools and regional high schools) and «surselva virtuala» (regional companies active in the hardware and software sector).

### Partners

The SAB **Association** brings to this project its experience acquired in regional development as well as its contact network. **Microsoft Switzerland** offers its financial support and technical expertise. The engagement of Microsoft takes place in the framework of its international programme aimed at promoting information technology and represents over two years a value equivalent to 100,000 euros - in the form of financial contributions, personal commitment as well as products and services.

Moreover, the idea benefited from wide support, with the participation of HP Switzerland in the pilot project (sponsor of the equipment), OFCOM (financial contribution) and Lia Rumantscha.

In the region, the project is based on the regional capacity to develop concrete ideas and to make human resources available to manage the project. All the elements of the project are defined at the regional level and thus reflect the expectations of the region.

### Organization of the network

The Surselva project contains two distinct sections. One for the companies and one for the individuals.

#### a) Individuals

Campaigns have been organised to inform the youth, the individuals and the companies about the opportunities offered by modern information technologies in private and professional life: **a roaming bus (Road show)** has visited 20 regional towns between May 2004 and June 2005. The CCM with Mathieu Mathiuet has been charged with organizing the activities. Mathieu Mathiuet has excellent contacts with training organisations.

The bus tour through the Surselva towns is an information platform **for individuals**, covering a wide variety of services such as Internet applications, computer and office infrastructure.

A special programme has been conceived **for children and youth**, presented in the framework of grouping classes together. The authors have made sure that the content interests the beginner as well as the advanced student, independent of their age.

Concerning the information programme meant **for individuals**, those responsible are keen not only to treat subjects like electronic communication, but also the practical applications of daily life like e-shopping, e-banking or, for example, the filing of tax returns.

#### b) Businesses

The three most important economic sectors of the Surselva region are tourism, construction and agriculture. Seminars have been organised with representatives of these three sectors. The aim of these seminars was to identify in common the needs of the companies and to develop project ideas. It was established that there was no need for the building sector. The activities in this sector have therefore been terminated.

In the farming sector, several projects have been developed and installed:

1. Sale of farm products through Internet, the site being updated by the farmers (<http://www.agrisurselva.ch/>)
2. Self-evaluation for the farmers on the changes brought about by the passage from the 2007 to the 2011 agricultural policy (tools on Internet).

3. Ongoing training programmes for the farmers are offered by the local IT companies.

Work is underway in the tourism sector and new projects are studied for the continuation of the programme. The coordination of this work with the companies was conducted by an IT company called ICSurselva.

## D – Assessment

### Budget, resources

Total cost for the individual awareness campaign: around **100,000 euros**, half of which was spent in cash and the rest in actual services (volunteer work).

### Staff

The functioning of the project is based on the regional will to cooperate and make it progress. Thus, **the regional coordinators** make free time available to do their work. To drive the bus and for the organisation of the network, there are **unemployed people** (paid by the compensation fund) who have partly reinforced the team.

### Results and evaluation

Besides the results described above, the project in the Surselva has also engendered other activities (spin-offs):

1. Microsoft has launched a version of Office in Romansch, the fourth official language of Switzerland. This language is spoken by about 50,000 people, particularly in the Surselva region.
2. Microsoft has set up a Community Learning Centre in Sedrun, also in the Surselva region. Here, the community can benefit from modern computer equipment and follow long-distance training courses.

This project is based entirely on the spirit of innovation and the ideas in the region. So it is best suited to meet the problems and needs of the region. This fact makes the project untransferable to other regions. Each one must define its own needs. In these regions, it is essential to find regional players who are motivated, who have time to devote to the project and who have a sufficient local network at their disposal.

### Perspectives / innovations

As this project has achieved a remarkable success, it has been decided to renew it in other mountainous regions and to extend the partnership till 2008. Since 2005, similar activities are in progress in the region of Obersimmental-Saanenland. A third region is presently being evaluated.

In the framework of the "Surselva Technologic Transfer" project, apart from the special bus tour (road show) through the 20 towns, a varied, parallel programme is also planned in the region for the next few months. For example, with the intervention of Dr. Bruno Wenk (Coire Technical and Managerial High School) on May 26, 2004 at the Acla da Fontauna de Disentis Sports Centre during a public event on the theme "Media and Education."

Finally, in order to stress its collaboration with SAB, Microsoft will also finance, over three years, a publicity train conceived with SAB, which will circulate on the CFF railway system and will therefore attract attention to the needs of the mountainous regions.

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- Name and address of those responsible for the "individuals" phase of the project: Martin MATHIUET (address : Casa de Mont, 7031 Laax - Tel. 081 921 25 60 and Fax. 081 921 25 70 - Email : [ccm.martin@rumantsch.ch](mailto:ccm.martin@rumantsch.ch))
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## ***The Høykom programme and the Norwegian Government***

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### **A – Presentation of the project**

HØYKOM is a large umbrella programme which promotes and supports the realisation of local, short-term projects. HØYKOM helps to launch and improve eGovernment activities via broad band Internet within many public institutions of various sectors (education, health and social services), as well as at all the administrative levels.

#### **People targeted**

The Norwegian government has clearly expressed its intention to promote the development of a public sector, coordinated and adapted to its users over the entire country.

#### **Aim of the project**

The Government has two main objectives in its modernisation process:

- To facilitate general public/authority interaction;
- To facilitate and promote resources which could strengthen the welfare state.

The objective of this programme is to give an impulse to the dissemination of innovative applications for eGovernment through broad band connections. The Høykom programme plays an important role in the efforts deployed by the government to reach its objectives of support to public sector organisations. This programme wants to use broad band Internet services for eGovernment in the framework of local and time-bound projects.

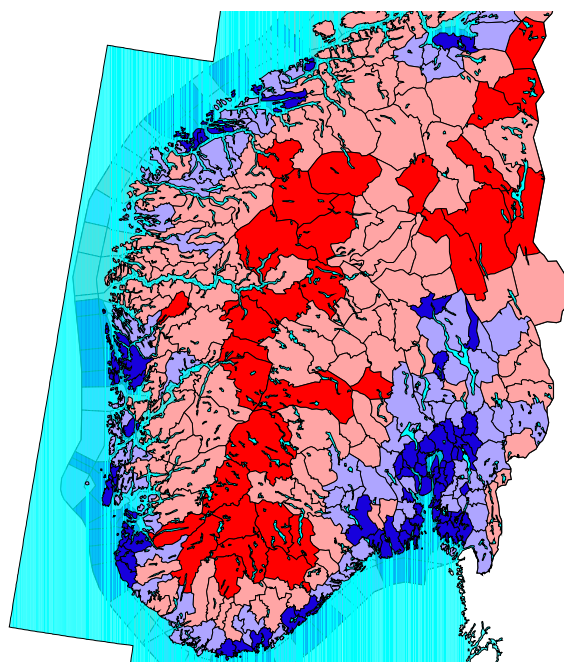
### **B- Context**

#### **The region**

Norway is divided into 19 counties, where 5 collaborate in the development of a policy in favour of the mountainous regions. These 5 counties are: Telemark, Buskerud, Hedmark, Oppland, Sogn og Fjordane

Even if the mountainous zone is vast, it involves a small number of people.

The map opposite indicates the limits of the municipalities and the population density: dark blue indicates the zones with the highest population density (more than 50 people per sq/km; light blue those with a little lower density (12.5 to 50 people/km<sup>2</sup>). The zones marked in light red have a population of 2 to 12.5 people/km<sup>2</sup>; those in dark red are the zones with the lowest population density (less than 2 people/km<sup>2</sup>).



The type of population living in the south of Norway is characteristic: the coastal zones and the low lands have the highest population density; the mountainous regions contain a much more dispersed population. The offer of access services to Internet being privatised, the private companies prioritise the populated areas in order to provide access. Many small municipalities have nevertheless invested via several initiatives to ensure access in their area.

### **Creation process**

The Norwegian Høykom programme is at present in its third operational phase. It started in 1999, initially for a period of three years (1999 - 2001). The third phase currently implemented covers the period 2005 - 2007.

The Høykom programme had as a starting objective to work exclusively on dissemination and development at the national level. New recommendations from the Ministry of Modernisation<sup>38</sup> have opened up the initiative to disseminate the experiences of the programme internationally and to include foreign experiences in the national debate. The Høykom programme is in permanent dialogue with eGovernment initiatives at the local, national and international level in Europe.

### **Role of the project**

Its main role is to develop the concept of eGovernment in the whole country through local projects adapted to the local environment and reality. Its role also extends to expertise and consultation through the exchange of experiences on the eGovernment theme in the country.

The Høykom programme does not directly finance the infrastructure (this is related to strong OCDE recommendations regarding respect of market cycles on infrastructure building - to avoid market distortion). On the other hand, some exceptions can apply to isolated zones in certain counties, knowing that the market there does not support the financing of the investment necessary for infrastructure and applications.

## **C – Functioning**

### **Who supports the project**

HØYKOM is financed by the Ministry of the Administration of the Reform Government and by the Ministry of Education and Research. The programme is controlled by the Norwegian Research Council.

The Høykom programme is at the same time the source of public financing for the development of the Norwegian eGovernment and also a reference centre for its implementation. The broad lines of its application have thus a major impact not only on the selection of projects financed by the programme, but also on the manner in which the government institutions conceive and implement eGovernment in Norway.

Over several years of functioning, the Høykom programme has provided financial support to more than 400 projects on a co-financing basis. It finances projects up to 50% of the total cost. For the total life span of the programme, the support amounts to more than 45 million euros and the total budget of the projects developed exceeds 130 million euros.

### **Organisation of the network**

The experience gathered during the programme and the large dissemination of knowledge issued from the Høykom programme makes it an important player within the network of public institutions and private

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<sup>38</sup> Since January 1st., 2006, the name Ministry of Modernisation has changed into Ministry of the Administration of the Reform Government.



companies working together to create an innovative public sector in Norway. Around 500 private businesses are engaged, mainly in secondary roles.

When the public sector, for example, a municipality, a hospital or whatever, wishes to start a local project enabling the increased use of broad band Internet, they are often in partnership with outside consultants.

If the project involves a new sector, the consultants are willing to assume part of the costs from their own budget. The total financing of the local project will then be divided into three parts: one is paid by the employer, another by the consultants, the last by Høykom. The reason why the private sector takes part of the costs from its own budget is that the project makes it possible for them to offer solutions to other clients.

Following a trial in the public sector of the BTV Region (Buskerud, Telemark and Vestfold counties), decision-making is delegated at the regional level. All the projects have to be presented in a rather detailed format. The most important criteria in the local project selection were, up to now, to see if the project would allow the increased use of broad band Internet and if the application comes from the public sector. It is also important to see if the project includes innovative activities.

## **D – Assessment**

### **Budget, resources**

As we have seen before, Høykom is a project financed by the Ministry of Administration, Government and Reform and by the Ministry of Education and Research.

The 2005 budget was 10 million euros.

In 2006, this budget increased by about 6 million euros. For the first time, the increase concerned the development of broad band infrastructure and particularly cable installation. The budgetary increase of the programme continues in the proposal presented for 2007.

Half the funds were for institutions in the peripheral zones. This is important in terms of thinking about the programme which is devoted to strengthening ICT capacities in these zones and their use of broad band communication to compensate for their isolation from the large centres. Finally, setting up infrastructure in the thinly populated zones is divided between the company, the region/municipality and the Government, through Høykom.

### **Staff**

During the first phase of implementation, the Høykom secretariat has provided assistance. Given the increase in the work load, this was not possible anymore. A consulting network has been set-up, than dissolved. A national centre for broad band applications has been created with 2 regional hubs. Yearly meetings have brought the project leaders together to share their experiences.

## **Results and evaluation**

The programme has been evaluated in the fall of 2003 by STEP (Research Centre on Innovation) now part of NIFUSTEP (Studies on Innovation, Research and Education).

The evaluation report has a summary in English which can be downloaded on the site <http://www.hoykom.no>

Among the important conclusions and recommendations of this report, one should note:

- The projects have permitted the renewal and improvement of services offered to the public as well as the internal efficiency of the administration and inter-departmental teams.
- No appropriate solution for the installation of a support structure for competences in the broad band sector has been found. On the other hand, 4 important organisational principles are offered:
  - \* semi-autonomous user forums in which professionals can also take part;
  - \* a judicious organisation by sector or by subject at the level of application and utilisation;
  - \* a regional organisation for infrastructural problems;
  - \* and detailed brochures for simple or coordination problems.
- The inter-departmental group working with Høykom on aspects of coordination should discuss and better orient the questions related to the work of the Høykom secretariat and the projects. One can cite, for example, the awareness of the problems of the zones not connected to broad band and the incompatibilities between the network conceptions of different sectors of activities.
- A concrete analysis of the market must guide the work rather than the general principles of competition.

## **Perspectives / innovations**

Høykom will continue at its present level in 2007 and actions will be taken to transfer in a much broader manner the best practices of the experiences adopted in the local Høykom project in the sector of public services and governmental activities. Steps will also be taken to disseminate the wealth of knowledge accumulated by the Høykom projects on questions related to Government which were raised during the years the programme functioned.

The Høykom programme should continue until 2007 by focusing on the development of broad band in the outlying regions of the country and by encouraging the society to use this modern communication tool. In order to promote the results and realisations obtained thanks to the Høykom programme, the aim is to enhance information transfer at the government level in order to improve the efficiency and simplification of the ICT use in the public sector.

The continuation of the programme will strengthen the support of projects having a large scale development potential and which evaluate and show their added value in a systematic manner.

## **E – Bibliography**

<http://www.hoykom.no/>

## **ICT Training for the rural zones in the Spanish Basque region.**

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### **A – Presentation of the project**

The Emalor *project*, started in 2004, is a response to the request for basic training for the women of rural areas in the autonomous Community of the Spanish Basque Region. This training is focused mainly on zones where no other training is offered or where it is not well adapted. It consists of a combination of distance training (e-learning) and training in the presence of professionals. The project has three training modules.

#### **People targeted**

This project particularly targets women from rural areas for the following three reasons:

- 1/ they constitute very dynamic elements in rural areas and are thus often initiators of other collective projects.
- 2/ usually they receive more general training;
- 3/ They need this qualification more urgently, because they often assume the economic responsibilities of the farms and small business units.

The beneficiaries should not have any paid activity. This programme is meant for adults.

#### **Aim of the project**

The main objective of the project is to train women from rural areas in the use of ICT (personal computer, Word and Internet) in order to initiate a future, ongoing training process via "e-learning" or by mixed training<sup>39</sup>.

On the other hand, the specific objectives are:

1. Awareness building on the importance of continuing education
2. Realisation of a training plan for the new technologies through mixed training courses adapted to the characteristics of the participants.
3. Use of mixed training methodologies
4. Creation of a learning community among the participants
5. Certification of the training through continuous evaluation

### **B- Context**

#### **The region**

The autonomous Basque Community (also called Euskadi) is one of 17 autonomous communities in Spain. In 1998, it had a population of 2,104,060 inhabitants; that is, 5.4% of the national population. The surface area of the autonomous Community is 7,234 Km<sup>2</sup>, where nearly 82% are classified as mountainous regions according to the CE 1257/1999 regulation concerning the rural development by the FEOGA (Fonds européen d'orientation et de garantie agricole) the European Orientation and Agricultural Guarantee Fund. 4% enter into the category of zones with specific handicaps and other under-privileged zones according to the same classification.

The CAPV region is influenced entirely by its mountainous terrain and by the particular climate related to this topography.

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<sup>39</sup> Mixed training: training including electronic distance training modules and training with staff present.

The first comarques (grouping of municipalities) where the project has been implemented are: Busturialdea, Urola Kosta, Errioxa and Arratia.

### **Creation process**

Beginning February 2002, the experience with the "Mendinet" bus began, the objective being to create awareness among the rural population of the use of new technologies in order to allow and facilitate their daily use in these zones.

This first experience included only that part of the awareness campaign which had easier access to rural populations thanks to the bus. It brought to the Emalor project the information necessary in order to offer training which is attractive (practical and informal), and adapted to the needs and interests of the participants (adult women from rural areas) .



### **Role of the project**

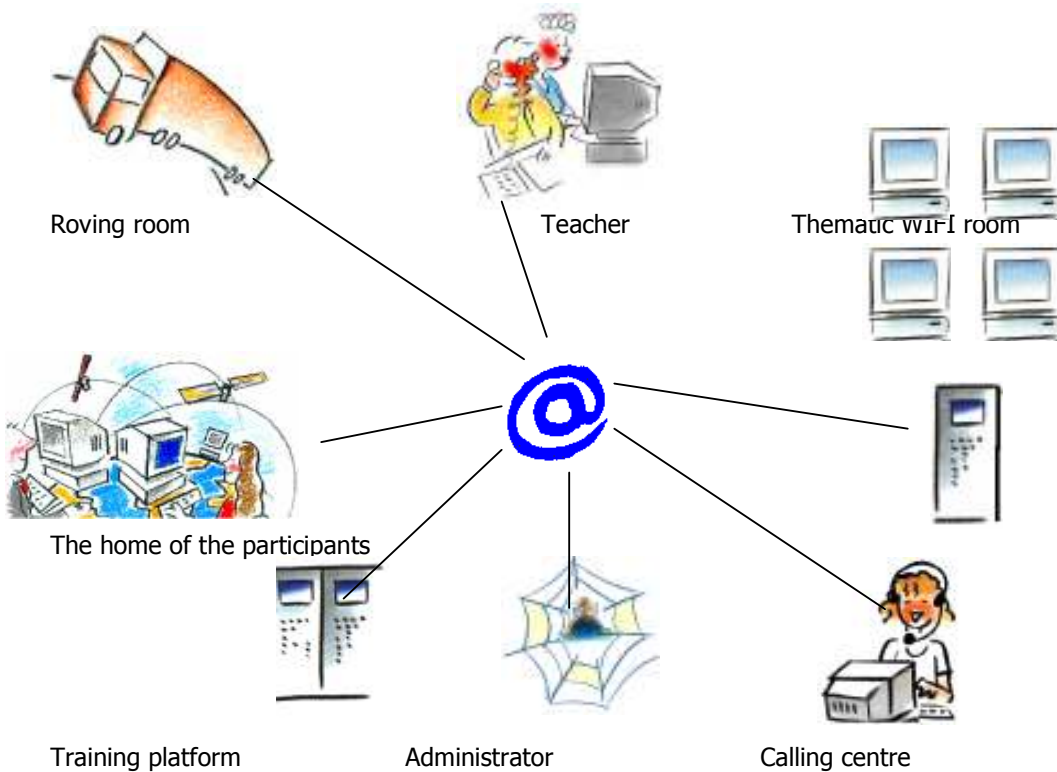
The Emalor project provides training in three modules where each one can be followed in the participant's home through Internet or in a common space (bus or room), with the presence of an instructor.

First module: Basic use of a personal computer, 20 hours of training in the bus, with the presence of an expert. The participants are in a small group (around 5) and each session lasts 2 1/2 hours. The training course happens in the presence of the teacher.

Second module: use of Internet, 22 hours of training in a room which can be located in a neighbourhood or local association, etc. As far as possible the room should be located near the Mendinet bus. The classes are given from personal computers or laptops arranged in the room, with the support of an instructor. The classes are given by electronic distance training.

Third module: use of Word 2000, 20 hours training. The training requirements are the same as in the second module.

### Technical organisation system:



## **C – Functioning**

### **Who supports the project**

The project is supported by ITSAMENDIKOI, a public training company depending on the Agriculture, Fishery and Food Department of the Basque Government.

### **Partners**

ITSAMENTIKOI has no direct partner in the Emalor project. But businesses cooperate by providing computer platforms necessary for electronic distance training. It is the AVANZO company which presently provides this technology.

### **Organization of the network**

The staffing of the network is rather light and the project is lead by two people employed by ITSASMENTIKOI.

## **D – Assessment**

### **Budget, resources**

The Emalor project is put at the disposal of all the professionals or local communities of the rural municipalities of the Autonomous Basque Region's objective 2. This is a free service provided to them.

The beneficiary (organisation, association, professional or from the municipality) of the training must:

- register the participants and identify their level of knowledge in order to allow ITSASMENDIKOI to prepare the classes in response to their needs.
- at the level of logistics, the beneficiary of the training has to provide a space for the bus to park, an electric outlet and good Internet coverage. For the room, it just needs to have electrical outlets. All the equipment is provided by ITSASMENDIKOI. If the participant decides to have distance training from his or her computer at home, the logistical organisation is even simpler.

The resources of ITSASMENDIKOI include:

- The Mendinet bus: a small, renovated bus for reaching rural municipalities. Inside, there are 6 computers connected to Internet through satellite as well as a qualified teacher
- Six laptop computers
- The Internet connections are provided for free by the AVANZO company

In the general framework, the project is financed by the LEADER+ funds, but in 2005, the project's budget was enhanced by contributions from the "Aprendizaje a lo largo de la vida" programme of the Basque Government's Education Department.

### **Staff**

The Emalor project has two employees financed by ITSASMENDIKOI. The first is the instructor and the second manages the call centre.

### **Results and evaluation**

According to those responsible for the Emalor project, there have been classes requested in three localities which have brought together 48 people (35 women and 13 men) between October 2005 and April 2006. The training courses via Internet at home have been unsuccessful up to now.

The evaluation by the participants of the Emalor programme during this first phase is generally 8.5 out of 10 (according to a survey conducted by ITSASMENDIKOI).

### **Perspectives / innovations**

ITSASMENDIKOI plans to continue this training project, which would be oriented towards children and the elderly, in the rural zones.

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## **Regulation of postal activities in France**

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### **A – Presentation of the project**

Regulation of postal activity is seen in the perspective of optimal **accessibility to the postal network**. For this, several laws have to be taken into consideration. By clarifying what each of these laws proposes on this topic, one can see that this "multi-legislative" way to manage the postal network is original.

#### **Objectives of the legislation**

The overall aim is **to develop the postal region in order to facilitate access to postal services**.

First of all there is a contract of performance and convergence, called **contrat de plan 2003-2007**, signed on the **13th January 2004** between the French State (the Vice-Minister of Commerce Nicole Fontaine) and the Post (the Postmaster General, Jean-Paul Bailly). It intends to upgrade the public service among the European leaders of the postal sector by 2010. One of the main objectives of this contract plan concerns the **reorganisation of the postal presence in the region** without reducing it.

One should also mention that, in this sector, the **LDTR** (Loi française relative au Développement des Territoires Ruraux) of February 23th, 2005 ensured **"a regional presence of national public services, the Post being on the top of the list."**

Finally, a third law deals with the theme of accessibility to the postal network. It is the law concerning the regulation of the postal activities of May 20th, 2005 (law n° 2005-516). This text adapts the community directives of 1997<sup>41</sup> and 2002. It intends to build an interior market of postal services in the European Union and to this end, it foresees that the "Post contributes to the development of the national region, in addition to its obligations as a global service through its network of contact points." Indeed, with the passing of this law, the approach of the regional presence of public services, described in the LDTR, is now based **on the development of a comprehensive offer and partnerships in order to give an appropriate response to the particular needs of the rural areas**. This approach is based on the principle of "sharing of means."

#### **The beneficiaries**

The beneficiaries of regional postal development are **the private customers**, especially the **populations residing in isolated regions** (rural or mountainous), who can now benefit from the maintenance and optimisation of the postal network in isolated zones and the delivery of various universal postal services.

### **B- National and/or international context**

#### **The region**

The Post has undertaken to **readjust its geographical presence** in order to adapt it to the population distribution while trying not to alarm the local authorities. Of the 17,000 existing contact points, those post offices considered "the least profitable" will be turned into "postal centres" (within a commercial unit or at the

<sup>40</sup> Assemblée Permanente des Chambres de Métier

<sup>41</sup> The outlines of accessibility to universal service are provided in article 3 of the Directive of 1997: "The member States will take action so that the density of the contact and access points take into account the needs of the users " and explained in the presentation of the judicial and regulating framework of the postal sector.

town hall) in the framework of the 2003 - 2007 contract plan. The Postmaster General, Jean-Paul Bailly, signatory of this contract, has stressed that there will be no closures.

### **Creation process**

The laws and directives have followed and complemented each other year after year in order to improve the development of the postal region in France.

### **Role of the legislation**

This mission of regional development is founded on competitive postal activities, beyond its obligations of strict universal service and even on all the activities, including financial, that the Post undertakes in accordance with article 2 of the 1990 law. It is in this spirit that the legislation **considers the distance and time to access a neighbourhood service offered in the network of contact centres**, rather than just to a post office.

## **C – Functioning**

### **Who supports the legislation?**

The Post and the development of the postal region are the central points mentioned in this legislation and these agreements.

### **Who has to implement it?**

The partners of The Post, which means the business people and shopkeepers, the local communities, the private and/or public players sign and enter into an agreement with the Post. They are thus bound by contract.

### **What are the measures planned?**

**The 2003 -2007 contract plan** contains a section related to the accessibility to public services in the thinly populated areas. The Post is allowed to enter into several types of partnerships:

- partnerships **with other public services** and those which offer benefits (railway ticket sales, for example) in accordance with an agreement protocol concluded with the railways institution) on behalf of other organisations.
- It is also authorised to ensure accessibility to the universal postal service through **partnerships with private players** (postal centres in shops and businesses) or **local communities** by the establishment of municipal or inter-municipal postal agencies.

Moreover, this contract introduces **an accessibility standard to the postal network** as we have mentioned above: less than 10% of the population of each department should be more than 5 km from a contact centre of the network (this standard, which concretises the development objectives of the postal region, must lead to the installation of new contact centres in approximately ten departments). It gives a judicial base to the departmental commission for a national postal presence and gives to the Prefet (Warden) the responsibility of ensuring the coordination of these tasks with those of the departmental commission for the organisation and modernisation of public services.

To this 2003-2007 contract plan, one has to add **article 104 of the LDTR** which completes article L.1 of the Regulation of the Post and Communication with a paragraph written thus: "Except for bulk sending, the postal services, constituting a reserved sector, are assigned the same basic rate as the whole national region. "

Finally, one has to mention the law of May 20th, 2005 concerning regulation of the postal activities. A decree of the State Committee has detailed the modalities according to which "are determined, at the departmental level and after consultation with the departmental commission of the regional postal presence (...), the complementary regulations of accessibility to the postal network in the capacity of this mission. "

These regulations take into account:

- the distance and time to access the neighbourhood service offered in the contact centres network;



- the demographic, social and economic characteristics of the concerned zones and especially their eventual classification in the zones of rural revitalisation or in the sensitive urban zones mentioned in article 42 of the law n° 95 - 115 of February 4th, 1995<sup>42</sup>;
- the geographical characteristics of the departmental region and the neighbouring departments, in particular in the mountainous zones.

The law of May 20th, 2005 stipulates that, " except in exceptional circumstances, these regulations cannot allow more than 10% of the population of a department to be more than 5 km away and more than 20 mn by car (in the traffic conditions prevalent in the concerned region), away from the nearest Postal contact centres", which strengthens the steps taken in the framework of the 2003 - 2007 contract plan.

## D – Assessment

### Budget and resources

We have seen that the **2003 – 2007 contract plan** provides for several types of partnerships between the Post and the players (private, public) to ensure accessibility to the universal postal service. In the framework of partnerships between the Post and the local communities (via municipal or inter-municipal postal agencies), the municipalities or the Etablissements Publics de Coopération Intercommunale (public institutions of inter-municipal cooperation) (**EPCI**)<sup>43</sup> receive in exchange a **compensation** of 800 euros per month or 900 euros in the ZRRs or sensitive urban zones. This amount is now allocated to the account of the postal fund of regional equalisation adjustment established by the law n°2005-516 of May 20th, 2005.

Indeed, the financing of the universal service will be ensured through the "**national postal fund for regional equalisation adjustment**", created after signing a contract between the State, the Post and l'Association des Maires de France - "French Association of Mayors" (AMF) and after consultation with the High Commission for the Public Service of the Post and Electronic Communications managed by the Post itself. This fund helps to finance the contribution of the Post to regional planning and development. The resources of the fund come notably from **local tax reductions** (professional and land taxes) "from which the Post benefits." The contact centres located in the rural revitalisation zones, sensitive urban zones or in the region of a municipality having concluded, with one or several others, in the framework (or not) of a EPCI, an agreement of regional presence with the Post, "benefit from a sizeable increase in the amount they receive on account of the postal equalisation adjustment. " A decree issued after consultation with the Higher Commission for the Public Postal Service and Electronic Communications details the financing modalities.

The remuneration allocated by the Post to the businesses welcoming a Postal outlet will shortly be eligible for a regional equalisation adjustment from the National Postal Fund instituted by the law and fuelled by local tax relief from which the Post benefits in the framework of regional development.

### The innovative points

The innovation is legislative because, in order to reach the optimal accessibility of the postal network, several laws and agreements are involved in this theme.

Also, for the first time, the postal law introduces a clear distinction between the mission of a universal postal service and its mission of regional development. Consequently, the financing modes of each of these missions are distinct: the compensation fund of the universal postal service for the first mission and the national postal fund of regional equalisation adjustment for the second.

Furthermore, the municipalities and the groupings of municipalities can now establish a partnership with the Post in the framework of a revised agreement model which provides important guarantees to the communities. It is good to remember that this system is purely contractual and that the municipalities are under no obligation to sign such an agreement.

<sup>42</sup> **Law n° 95-115 of February 4th, 1995**: law for national planning and development, called the Pasqua law.

<sup>43</sup> **EPCI**: Les Etablissements Publics de Coopération Intercommunale (EPCI) are municipality groupings with the goal of setting up "common development projects within solidarity circles." They are subject to common rules, homogeneous and comparable to those of local communities. The urban communities, town communities, new town syndicates, municipality syndicates and mixed syndicates are EPCI.

(definition of INSEE: [http://www.insee.fr/fr/nom\\_def\\_met/definitions/html/etab-pub-cooper-intercom.htm](http://www.insee.fr/fr/nom_def_met/definitions/html/etab-pub-cooper-intercom.htm))

## **Results and evaluation**

The present size of the postal network, which has **16,982 contact points**, meets the accessibility obligation of the postal network (introduced in the 2003 – 2007 contract plan and completed by the law of May 20th, 2005) in almost all the departments. The application of this accessibility regulation in the capacity of public service does not rule out the obligation of the Post to adapt its contact points to the evolution of the life style and consumption habits of its customers, in different ways and on the basis of regional agreements adapted to the diversity of the regions. **The municipal postal agencies constitute an adapted formula to ensure the preservation of public service in small towns and today there are more than 1,900.**

For example, the agreement signed between the Post and the French Mayors' Association on April 28th, 2005, allows municipalities or communities wishing to get involved in a partnership with the Post, a precise and lasting framework as well as guaranteed financing over a period stretching up to 9 years. The compensatory allowance, now inclusive, paid by the Post to the municipality has been substantially raised to take into account the expenses really incurred by the community, essentially in the cost of personnel.

Moreover, more than 700 postal points, now called "Relais Poste" (the second version of the national agreement on the Postal points– June 1<sup>st</sup>, 2005)<sup>44</sup>, are currently installed in shops/businesses. They also contribute to the upholding of a neighbourhood postal service, in particular thanks to their extended opening time, and can be useful, especially in the case where the municipalities do not want to establish a municipal post office and wish rather to promote local trade or neighbourhood businesses.

## **Perspectives / innovations**

It seems interesting to question the impact of the 2003 - 2007 agreement between the State and the Post and its effect on the local finances of the towns in rural zones. Indeed, as emphasised by Ms Annie DAVID, senator of Isère (Rhône-Alpes Region), this agreement consists of "liberating the operator from what is related to universal service or general interest service to transfer the responsibility to the public. The same goes with the contact points of the Post or the municipal post offices, which will evolve through agreements with the municipalities or private, local partners, according to their needs." According to her, it represents an additional burden too heavy for the local authorities. The fact being that the local authorities are unable to manage, Ms David fears that rural desertification goes unabated because the State is uninvolved. Measures need therefore to be taken in order "to maintain a quality postal service throughout the whole country so that the rural sector is not penalised and give to the local citizens and authorities equal access to public services that they are entitled to.

Finally, the law regulating postal activities has allowed the creation of the national postal fund of regional equalisation adjustment to help the Post finance the development work of the postal region. An implementation decree has to clarify the implementation modalities of this fund, notably in the framework of a perennial contract of the national postal presence signed by the State, the Post and the most representative National Association of Mayors, after consultation with the High Commission of the Public Services of the Post and Electronic Communication (CSSPPCE).

The Departmental Commissions of regional postal presence will propose a distribution of the departmental budgets of the fund, taking into account the specific needs of the mountainous zones, rural revitalisation zones and sensitive urban zones (ZUS). But this fund intends to finance the Post exclusively which, even in partnership with municipalities or merchants and businesses, takes up the biggest financial burden. In this regard, the costs incurred by the Post in the framework of the financing of municipal postal agencies, notably the compensation paid to the municipalities welcoming a municipal postal agency, will be eligible for the regional equalisation adjustment of the national postal fund.

All these orientations are in line with the work conducted in the framework of the National Conference of Public Services in Rural Areas initiated by the Prime Minister on the 17th February 2005, in order to have a close consultation between public enterprises and local communities on all the public service restructuring projects in rural areas.

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<sup>44</sup> **The National Agreement on Postal Outlets:** the aim is to maintain the postal presence in isolated areas with low demographic density. In **2003**, partnerships between the Post and businesses (public / private): the Post has proposed to merchants and businesses to offer current postal services, to complement their activities: this is how the postal points called "Relais Poste" have been created. In 2005, in order to develop these Relais Poste, the Post proposed **a new agreement model** based on a range of guarantees and principles.

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## *The Ymago project in Switzerland*

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### **A – Presentation of the project**

Since 2001, the Post has restructured its network of post offices. This first phase of restructuring has been decided more or less by the Post itself. This has provoked a lot of criticism from the population and concerned municipalities. Since 2005, the Post wants to improve its network of post offices thanks to a close interaction with the concerned parties. This process was called project Ymago.

The Post installed **the Ymago project in 2005**. This term comes from the Latin "imago" (image) reflecting the philosophy of the project; namely, the creation of a new model based on very diverse images and representations, with provision for innovative suggestions.

#### **People targeted**

Private clients and businesses are the public concerned with this initiative which guarantees the optimal quality of the postal services provided as well as an improvement in the accessibility of these services. Equally concerned are the Postal employees, who are enduring the restructuring of the network and who see the number of jobs dwindle.

#### **Aim of the project**

The reorganisation of the network is in line with the following directives: improvement of profitability, taking into account the habits of the clients and the legal mandate to which the Post is bound; that is, to continue to provide public postal services over the whole country at an excellent level of quality.

In terms of numbers, the restructuring of the network brought the number of post offices from 3,396 in 2001 to approximately 2,500 in 2005.

### **B- Context**

#### **The region**

First of all, living habits evolve. Six out of ten people today work outside of their home town and three out of four live in urban areas. This evolution has as a consequence that **more and more customers wish to have access to postal services in their work place or on the way to work.**

Moreover, there is a strong decrease in operations at the counter. Today, eight out of ten Swiss have a cell phone. Nearly 3.6 million people use Internet - first of all the e-mail service. Conversely, **the usage rate of the post offices continues to fall.** Consequences: between 2000 and 2004, the volume of letters posted at the counter has decreased by 31% and parcels by 34%. The number of payments has dropped by 8%. In addition, there is a **hardening of the competition** linked to the liberalisation of the postal market.

#### **Creation process**

There are two distinct phases in the restructuring process of the Swiss postal network. Indeed, the Post has started to restructure its network from January 2001 onwards. The public service of the Post operated on four distribution modes, namely: **postal agencies, subsidiaries, mobile services (mobile post offices),**

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**home delivery.** This first phase came to an end on May 31st, 2005. In 2001, the postal network consisted of 3,396 offices and in June 2005, there were 3,525 post offices. These were spread over 1,767 traditional post offices, 657 subsidiaries, 126 agencies, 7 mobile offices and 968 home services. 122 post offices have been eliminated.

**The second phase is the Ymago project, set up in 2005 via pilot projects.** It describes a new network model, tested between 2005 and 2006 and which includes **the postal agencies** (partnership between a post office and another service; for example, a business or a community office), **the postal entrepreneurs** it is the opposite of agencies because in this case a private agent offers more than postal services, **the automatic counters and the main post offices<sup>46</sup> and their subsidiaries.**

### **Role of the project**

"**Solutions through dialogue**" is the motto of the Ymago project. The Post wants to develop its sales network in the framework of a dialogue with the population, the municipalities, the cantons, the associations, the unions and its collaborators.

The aim of this project is also to confirm the Post in its engagement to always provide quality public service to all of Switzerland, thereby offering a guarantee to the Swiss customers.

## **C – Functioning**

### **Who supports the project**

**The Swiss Post** initiated the restructuring of its network which ran into deficit.

### **Partners**

In the framework of the Ymago project, the Post has started a dialogue not only between its staff, all **the political, association and union partners** and the authorities of this reorganisation, but also between **external partners** (small businesses or big distributors). **The cantons and municipalities** are also closely involved in this project.

### **Organisation of the network**

Still in the framework of its Ymago project, the Post tests new ideas for its post office network. In 2005 and 2006, **around forty pilot projects** are set up to this end **all over Switzerland**. Each of these test runs lasts about one year and **their objective is to determine if these models are accepted by the customers and if they are adapted to daily life**. As soon as the results of these test runs are in, the Post will decide on the continuation of its network restructuring (probably at the end of 2006). The application of definitive solutions is planned as soon as 2007.

The new model proposed by Ymago can be described more precisely in four points:

- **The postal agencies:** they offer postal self-service in the neighbourhood shops. External partners (like retailers, wholesale merchants and railways) provide a range of the simplest products, user-friendly to the customers. Also, the simplification of deposit and processing operations, notably paying without cash, will be among the priorities.
- **The postal entrepreneurs:** they are independent entrepreneurs who, besides the postal services, pursue a second activity. Thus, they propose other services or products in their post office for their own benefit and at their own risk. They also distribute postal deliveries within a determined perimeter.
- **The automatic machines** are complements to the postal counters in the most frequented offices. In a first phase, the customers can test an automatic machine for money transfers. This machine allows one to

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<sup>46</sup> The agencies, the subsidiaries and the mobile post offices are also legally considered post offices.

make cash transfers, in Switzerland and in Swiss francs, by using the Postcard, the Conto card or the Deposito card. These automatic machines are available round the clock and are able to handle transfer payments and post deliveries (letters, parcels).

- **The main post offices and subsidiaries:** a main post office manages several subsidiaries. The subsidiaries delegate the administrative tasks to the main post office and focus on customer operations and sales. As it is an internal reorganisation of the Post, this model does not entail any change for the customers.

## **D – Assessment**

### **Budget, resources**

The aim of this reorganisation of the rural and urban network was to reduce by 100 million francs the uncovered expenses contracted by the postal network, a result which was attained.

### **Staff**

The 3,390 post offices which existed previously (January 2001) were reduced by 700 - 900 offices by 2005. This concerns 80 offices for which no replacements were found and the 620 - 720 offices which were replaced by the home service. Around 500 full-time jobs have therefore been scraped. **This staff reduction was done mainly through the usual fluctuation in order to avoid redundancy.** By this restructuring, the Post hopes to save 100 million francs per year.

The cantons of Berne, Fribourg, Glaris, the Grisons, Tessin, Uri, Vaud and Valais are particularly hit by the restructuring of the post office network. It is important, from the point of view of the mountainous regions, that the regional level is considered when the network in question is reviewed.

### **Results and evaluation**

The whole country is guaranteed access to postal services. Today, in general, more than 90% of the population has access to the nearest post office within 20 minutes maximum, by foot or by public transport. Furthermore, the postal network remains one of the densest in the world: there is one post office for 2,878 inhabitants (2,208 in 2000).

Moreover, **a representative survey** conducted at the beginning of **2002** by an independent institute has revealed that to a large extent, the agencies, subsidiaries, home postal service and mobile post offices meet the needs of the private customers. **Another survey conducted in October and November 2003** has confirmed these results. People living in municipalities having a traditional post office have been associated with this second survey. The results of this survey indicated clearly that, first of all, the satisfaction of the customers in regard to Postal services does not depend on the manner in which these are provided. Nevertheless, it was established that the home service is a form of service little used by the customers. Many customers prefer to settle their postal business in the nearest village which still has a physical Post office. The second survey has also measured the satisfaction rate of small and medium businesses (PME). These are, in general, more critical than the private customers. Nevertheless, the grades they attribute to the Post remain above the average of similar surveys. Again, it is mostly the home service which does not meet the needs of the PME.

### **Innovations**

The innovation is in the fact that after the first phase of restructuring, the Post now actively seeks to engage in a dialogue with the concerned parties. This change in the Post's attitude is due mainly to political pressure. After the restructuring, a citizen's petition was launched. It suggested that the Post maintain its post office network. The petition has been rejected by a narrow margin of the Swiss population with 50.2% of the votes. At the same time, the Swiss Parliament has increased pressure on the Post and has registered a mandate about the infrastructure in the Post Act.

Consequently, since 2004, the Post has to operate a postal network covering the whole country. It is also necessary that a Post Office offering public services is available within a reasonable distance. For the places

where basic services are provided through the postal home service, the Federal Council considers that a distance of 20 - 30 minutes by public transport is acceptable. In other words, as it was carried out up to now, the reorganisation of the postal network is in accordance with the political requirements and in particular, with the public service.

For the Federal Council, the agencies, subsidiaries and mobile post offices also enter into the category of post offices. Regarding the postal home service, it is considered a **substitute solution** to the post office, allowing the functioning of the public service. On the other hand, the Federal Council and the Parliament have expressly abandoned the idea of legally fixing the number of post offices.

### **Perspectives**

**The principal request is the extension of the Post's opening timings.** Later opening hours in the evening are thus requested. The Post takes seriously the need that has been expressed and endeavours, in the framework of the restructuring of its network, to offer the customers access to postal services in the most user friendly and practical way possible.

Moreover, in an open market context, it is indispensable to have a certain perspective in the **management of the business**. Since January 1st, 2004, PosteColis functions in an openly competitive environment. The limit of the letter monopoly is 100 g since April 1st, 2006. The limits fixed by Switzerland are much higher than those in force in neighbouring countries. In the European Union (EU) there is still a monopoly only for letters. This monopoly has already been limited to 100 g at the beginning of 2003 and the EU wants to pursue the opening of the letter market and reduce the monopoly to 50 g in 2006. It also considers completely liberalising the postal services in the member states from 2009 onwards.

On the other hand, the Post has little growth perspectives in the domestic postal market. But, to get income from the foreign liberalised markets, it is less and less possible to isolate Switzerland from the world through limits of the monopoly. Foreign postal companies and private businesses already represent stiff competition for the Swiss Post. Competition evolves and affects other products and services.

In spite of the success and acceptance of the postal network restructuring, efforts still have to be made to improve user friendliness and the profitability of the postal network. The habits of the customers change more quickly than what was foreseeable a few years ago. The drop in the number of letters, parcels and money transfers at postal counters continues.

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## ***MSc on 'sustainable management for the development of the mountainous zones' online in Scotland***

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### **A – Presentation of the project**

The Study Centre of the Mountain of 'Perth College' has been created in 2000. 'Perth College' is one of the 'UHI Millennium Institute' (UHI) partners, the only institution of higher education in the Scottish Highlands, which in the next few years will become 'The University of the Highlands and Islands'. This structure offers training and research activities at the University level through partnership with 14 Colleges and Research Centres as well as around a hundred Learning Centres throughout the region. In 2004, UHI has conceived a new Master of Science (MSc) on "sustainable management for the development of the mountainous zones" dispensed online, by Internet.

#### **People targeted**

This Master of Science is an ongoing, online course meant for part-time students; that is, those having family or professional commitments, residing far away from the training centres and/or being spread over a large geographical area. The people targeted work either on different aspects of development of the mountainous zones, or are professionals wishing to reorient themselves on "mountain" subjects.

#### **Aim of the project**

The aim of this training course, as much in its content as its form, is to answer to the specific demand of the mountainous zones and their population. The people living in the mountainous zones need new approaches for the sustainable development of these zones. Thus, the course is based on an integral approach of the economic, social, and environmental sectors in order to come up with global solutions for the development of the mountainous zones. Integration is also found in the assessment of the solutions, their implementation, the analyses of the results and the development of new policies.

### **B- Context**

#### **The region**

The Highlands and Islands region of Scotland are predominantly rural and mountainous. As in many mountainous regions, one can observe a decrease in agricultural and industrial activities. One can also find a strong desire to maintain a decent living standard and stable communities to slow down the population drain to the towns. This can be achieved in different ways and particularly by guaranteeing a set of job opportunities at all levels.

#### **Creation process**

At the level of European policies, the importance of the mountainous regions, for the inhabitants (but also for the European populations) became obvious at the end of the 90s. Thus a Community mountain problem appeared at the crossroads between sustainable development and the Community policy of cohesiveness.

The mountainous zones have to deal with rapid changes in their natural environment as well as in their economy and society. The answers and policies to apply in such a context cannot be developed by isolated disciplines and have to favour the inter-relationship of the fields.



Two interdisciplinary, high level training courses in the domain of sustainable development have been conducted for several years by the institutes of the UHI network (BSc in Rural Development Studies; BSc in Sustainable Development and Environmental Management). From the experience acquired with these two training courses, the MSc "sustainable management for the development of the mountainous regions" continues and has been developed online.

### **Role of the project**

The concept of ongoing, online training in sustainable management of the mountainous regions wants by its integrated approach to respond adequately not only to the expectations and new challenges of these zones, but also to the professional, personal and geographical constraints of the populations.

This high level training course offered to professionals originating and/or working in mountainous zones will provide a scientific basis for these students. Reinforced by the more concrete approaches of the mountains, these future European mountain experts will be able to direct and debate the crucial questions and give birth to coherent European policies, adapted to the development of the mountainous regions.

## **C – Functioning**

### **Who supports the project**

The MSc on 'Sustainable management of the development of the mountainous zones' of UHI is supported by the Mountain Study Centre of 'Perth College'. UHI has the feature of using ICT for training and research classes and also for more administrative tasks such as steering committee meetings.

### **Partners**

Finally, it is the 14 colleges and research institutions which are the partners of UHI and participate in this Masters Degree programme. The staff which is responsible for these training modules is found in 5 of the 14 partners, in Perth College, Inverness College, Lews Castle College (located in Stornoway), Orkney College (Kirkwall), and Moray College (Elgin). UHI puts its online library at the disposal of its students. This is a key element of the IT setup of the UHI, in which 25 million Pounds Sterling have been invested since 2000.

### **Organisation of the network**

The course offered is mainly online, but not exclusively. An introductory and "putting in perspective" week-end is organized at the beginning of the 3 year training course; this facilitates the online interaction between students during the programme.

The online training course has been developed through a specific technology: the "black board" of the Virtual Learning Environment: VLE. The screen, protected by a password, provides all the information necessary for the training course, stores the documents, web casts and online conferences. For some training modules, the classes prepared by using "Microsoft Producer" are provided on CD to the students. This software allows the students to see a PowerPoint presentation and a video of the class simultaneously. For each module, there is a discussion desk which the students use regularly, where they submit their weekly homework assignments and where they can ask internal questions.

## **D – Assessment**

### **Budget, resources**

Because of the online character of the training course, material needs are reduced. The bulk of the training equipment is provided in computer form, even if it is true that the students print many documents which are downloaded from the VLE or the web sites of the online library! However, one has to admit that the teachers

have to be very organised; they have to post the documents on the VLE well before the date when they will be consulted and they have to ensure that all the links are updated. Also, the "Microsoft Producer" classes take a long time to put together and entered and they have to be offered to the students at the beginning of the semester. It is also important to note that an online library with access to a large range of magazines and newspapers is essential. UHI has made considerable investments for the acquisition of such resources.

### **Staff**

For the development of this Master degree programme, the teachers come from 5 of the 14 partner schools of the UHI and have some experience in administering online classes.

### **Results and evaluation**

The students who have taken classes in these first three years have given positive feedback and new applications have been filed.

Four main lessons can be drawn from this first experience:

- to start early with a clear and concise description module;
- To be aware that the context is often more important than the content;
- constant necessity to provide diversity (in means of communication, evaluation, resources.)
- with online access and the low number of students, it was possible to provide personalised assistance in real time.

These observations show the great importance of these new online training courses which allow access to very flexible and adaptable classes from anywhere in Europe. Presently, the training course is only valid in GB; nevertheless, there are good reasons to think that the training course can be offered anywhere in Europe as early as September 2007.

### **Perspectives / innovations**

To conclude, it is a unique training course which allows people from isolated communities or who have little time because of family or work obligations to pursue advanced training. The first person who wanted to follow this training course is a good example: she has two children and produces fruits and mushrooms on Skye Island, far from any urban centre.

The students as well as the teachers recognize the flexibility that these online courses allow. The students can work at any time of the day or the week and can contact the professors by E-mail or phone. The teachers do not have fixed hours for classes or work and are able to meet the demands of the students and follow their progress from anywhere in the world. On the other hand, even though everyone recognises the advantages of an online system, there is also a demand to be able to study the problems of real life on the ground; so a short training period in the field is planned.

## **E – Bibliography**

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## ***Social integration through ICT training of women in the Bugey, France***

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### **A – Presentation of the project**

This project has been implemented between September 2004 and September 2006 in the region of the Bugey, Ain department (01) to train groups of women volunteers in the use of the computer and Internet.

#### **People targeted**

The project targeted isolated women living in the rural region of the Bugey, having no recognized status (housewives, without employment, partners of entrepreneurs) and often asking for a "social link".

#### **Aim of the project**

The initiative aims to:

- ✓ Train isolated women (socially, geographically) to use a computer and give them the skills necessary to use the Internet
- ✓ Give birth to initiatives, individual or collective, from the women
- ✓ Develop local integration and social bonds among the women's groups

### **B- Context**

#### **The region**

The project concerned the Bugey region and more specifically the cantons of St Rambert in Bugey, Hauteville, Champagne en Valromey (cantons, objective II). This region is situated in the extreme south of the Jura range, at an altitude of 200 to 1,530 m according to the zones. It is a region of medium high mountains, very wooded, surrounded by the developing metropolitan centres of Lyon, Chambéry, Grenoble, Annecy and Geneva.

The population of the Bugey has been increasing slowly since 1975, less than in the Ain department in general. The population density is low (on average 38 inh/km<sup>2</sup>), and there are density variations with only 2 to 10 inh/km<sup>2</sup> in the hilly zones.

The region is characterised by a limited communication network: the lack of a highway makes driving difficult; some areas are not covered by the mobile telephony network; the towns of the Bugey have limited access to broad band; some areas are poorly covered by major, national television channels (5<sup>ème</sup>, Arte, M6).

Also, local access to services is limited: many villages do not have a Post or banking service, nor a neighbourhood shop, these being concentrated in the cities or towns. Cultural activities are limited (sports, cinema, music, shows).

This region is affected by difficulties in job access, notably for the women living in rural areas and in mountainous zones. Isolation linked to the lack of collective transport reinforces this problem. These women are often in search of a recognised activity, of financial independence and self-fulfilment and possess a dynamism which can be exploited.

### **The creation process of the structure:**

The project has been implemented in the framework of the Programme Régional d'Actions Innovante - PRAI) initiated and co-financed to the tune of 50% (3 M€ over two years) by the European Commission and to which the Rhone Alpes region has responded on the theme:"ICT and development players of the mountainous regions." The project is supported by the Centre de Formation Professionnelle et de Promotion Agricoles des Savoie et du Bugey (CFPPA) based in Belley.

Its implementation is based on a thorough knowledge of the region by the CFPPA, as well as on the debate about the role and isolation of the women in the Bugey and on the perennial activity and preservation of activities in rural zones. Furthermore, the development of the FOAD (Formation Ouverte A Distance) at the CFPPA and the perception of the "digital divide" (fracture numérique) have contributed to develop this type of action.

### **Role of the project**

In this project, Internet and the ICT in general are regarded as tools allowing access to information, knowledge and a window on the world. But this project is mostly perceived as a practical training ground: Internet, more than a mere training support, is also a pretext for these women confronted by common problems (status, isolation, role of the woman, children) to meet. Internet is thus mostly a tool aimed at creating a social bond.

A study realised by the Chambre de Commerce et de l'Industrie de la Drôme (in the Equal framework) and the CFPF (Centre de Formation Professionnelle Forestière), conducted by the wives of foresters shows that they are attracted by innovative training tools which favour their taste for contact. Ongoing courses are for them a means to get out of their daily environment and because of that they favour courses where an instructor is present.

The aim is finally to create individual and collective initiatives in the tourism sector, as well as economic activities (TPE and PME), and services to the people (the three sectors cited in the regional project appeal). These sectors are well adapted to women. The idea is that Internet be integrated in the initiatives conducted by the women and used as a means to communicate their actions.

The objective was that exchange of experiences can happen between the groups and that more global initiatives develop. Exchanges with the local network: authorities, associations ... have taken place in order to better integrate the women into the social fabric.

The innovative aspect of the project does not stem so much from the content of the courses given, but more from the fact that these courses allow those people with common difficulties to meet, which creates a social bond.

## **C – Functioning**

### **Who supports the structure?**

The project is supported by the Centre de Formation Professionnelle et de Promotion Agricoles des Savoie et du Bugey (CFPPA) based in Belley.

### **Who are the partners?**

The CFPPA, which supports the project, works in partnership with local organisational structures, the local and regional communities (notably the Région Rhône Alpes), le Pays du Bugey, la MSA (Mutualité Sociale Agricole), l'ANPE, le CIDF (Centre d'information sur les Droits de la Femme) of Ain.

### **How is the partner network organized? Is there a network organization?**

The partners have been mobilised during the installation of the project. It went through several phases:

- 1) A meeting of the local partner organisations in three cantons to consider the collaboration and at the same time, a meeting of the social organisations to identify a potential target population.
- 2) The constitution of a steering committee composed of local authorities, tourist sector professionals, entrepreneurs, social worker associations from the Bugey region, the CIDF, the Region Rhone Alpes, of a ICT professional. The task of the committee is to think about, define and supervise the different phases of the project in relation to the objectives developed.
- 3) Women's meetings identified beforehand with the help of the local networks (social workers, schools, MSA) to analyse the problems of women in isolated rural zones and their socio-professional objectives, over 3 different cantons.
- 4) A report of the encounters through a collective meeting and a proposal to the women to form groups.
- 5) The setting up of practical training courses based on ICT, about 1d/week over 6 months extendable, considering the progress of the initiatives.

## **D – Assessment**

### **Budgets and resources**

Budget estimate (2005):

- 1part-time coordinator over 2 years: 37500 €
- experts' contribution: 37500 €
- miscellaneous (computing, site creation): 10,000 €
- (eventually computer equipment: 15,000 €)

### **Staff**

A woman coordinator takes care of the coordination between the partner networks

### **Results and evaluation**

*(Conclusions issued from an assessment day conducted in the presence of a sociologist)*

The project has given satisfactory results at the social level. It gave self-confidence to the women involved and allowed the development of personal initiatives. It facilitated the return to employment for some, as well as taking up responsibilities in associations. It inspired others to get involved in creating a business project or taking up studies again.

At the level of "computer" training, the project inspired the women to buy computers, to enter a more advanced course, to use internet daily (purchases, research, correspondence with the children), as well as to informally train other people.

The women involved express their satisfaction with having been able to discover and make discoveries about their region through Information technology and to present a good image, for the development of tourism. They also stress the positive role of the project in regard to the need for interaction between women on their life experiences and their concerns.

### **Perspectives**

At the end of their course, the women involved in the project wish to continue interactive days of exchange with coordinators (on themes like "not holding on when the situation changes" or "The place of the woman: historical and cultural approach") and redo a computer assessment session.

Also, following the positive assessment of the groups, the skills and experience acquired by the CFPPA and the acquisition of laptop computers, the CFPPA wishes to renew the assistance of women's groups in the community of the Lhuis villages and on the perimeter of the canton of Seyssel.

## E – Bibliography

- Web site: [www.belley-cfppa.educagri.fr](http://www.belley-cfppa.educagri.fr)

## ***International Educational Project in the framework of a Leader + initiative in Spain and Ireland***

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### **A – Presentation of the project**

This project targets more particularly rural schools with:

- 2 to 3 professors
- facility in geographical linkage in order to maximise resources, cooperation and learning
- Selected schools in underprivileged zones

Objectives:

- To improve the quality of life in rural zones
- To maintain and develop vital rural services by increasing the role of the primary schools as community development agents
- To promote the realisation of an education project by supporting Community Development Initiatives for Education.
- To build on the previous formal and informal links in Ireland as well as in Spain
- To work with international partners experiencing the same problems in terms of rural depopulation and disadvantages at the educational level
- To promote and facilitate the engagement of parents in the activities
- To steer and develop the practices observed / learned through international contacts

### **B- Context**

#### **The region**

The schools which participate in the project are located in isolated rural zones with similar socio-economic and demographic contexts. The zones where the schools are located are almost adjacent. These factors facilitate the participation in cluster activities and the transfer of best practices among the participants. Moreover, the schools are all in the most marginalised zones of the GAL (Local Action Groups) regions. Thus, while responding to the objectives of the project, the experience benefits families which otherwise would not have had the opportunity to travel outside their locality.

Located inland and in the mountainous zones of Spain, the two GAL, CIDER Prepirineo and INTEGRAL had to face a rural exodus and a reduction of services in their region. This common experience (the similarities in terms of development of local resources and social capital by the LEADER initiatives as well as learning through the Schola pilot project) has given to GAL a common base from which it was possible to pursue the Schola project and collaborate with other regions.

#### **The creation process of the structure:**

The present Schola project was built on a pilot project conducted by IRD Duhallow and 2 Spanish GAL: CIDER Prepirineo and INTEGRAL at the end of Leader II. This pilot project has confirmed the merits of the promotion of links between small rural schools within the regions of GAL or outside. This project has allowed the creation of different local development activities taken up by the IRD Duhallow, including a network of primary school principals, the development of educational projects in the primary schools, the realisation of training courses for parents associations, of information and youth development association workshops. By

coming together for these activities, which were organised by GAL, the primary schools have understood the possibility of cooperation. Many schools came together in clusters of 3 to 4 schools in order to promote and install "the revised school programme" introduced by the Irish Ministry of Education and Science in 2000. Thus the combination of organisation and development activities of the capacities of LEADER organisations was essential to give to the project a solid base and a clear strategic vision.

Parallel activities have been promised by the Working Group for Development of the Community of IRD Duhallow's. These activities targeted the themes of rural exodus and the considerable reduction of vital public services in marginal rural zones. According to the Working Group, school in rural zones is an essential public service and one on which the other services develop. In order to promote sustainable development of the Community and slow down the rural exodus, GAL actively promotes projects which stress the quality of life and make the rural zones attractive places to live in. In 2001, the Irish Government, under the CLAR programme, has designed the organisations of the underprivileged rural zones, which responds to what the LAG has stressed.

In Spain and especially in the mountainous zones, numerous rural communities had to face similar problems. Likewise, the Spanish GAL and the local authorities are widely recognised for their innovative efforts to treat the consequences of several decades of urbanisation observed in the rural zones. The GAL have been the forerunners in the promotion of projects on ICT and regional marketing. They had spectacular success in the development of resources of the main organisational structures and in promoting and developing infrastructure and local services. Several seminars organised by the AEIDL have allowed the Irish and Spanish GAL to make their work known and have resulted in cooperation between the CIDER Prepirineo GAL and INTEGRAL with several zones.

## **C – Functioning**

### **Who supports the organization?**

IRD Duhallow LTD of Ireland supports the organisation of the project in collaboration with 3 partners:

- West Cork LEADER CO-OP (L+ IENAT- 118)
- ADESAR PREPIRINEO (L+ESNET-03), Navarra y Aragon/ Spain, including 2 entities: Asociación CERDENA-GARALUR (Navarra) and CIDER PREPIRINEO (Aragon) and INTEGRAL (Murcia)
- Tuatha Chiarraí Teoranta (Financed by the National Programme, Ireland)

### **How is the partner network organised? Is there a network organisation?**

In the case of Ireland, a steering group specially constituted with the representation of the 3 GAL and the 5 participating schools, has the entire responsibility for the conception and installation of the project's activities. Thus, the steering group provides regular reports to the GAL steering committee. The steering group has shared its own working programme which extends beyond that which was previously planned in the work plan of the CAPS. This extended work programme wants to bring more importance to the organisations supported by the GAL. Thus, the participants have undertaken other parallel projects, including the exchange of resources in the development programmes and the creation of days "for the organisation of the schools." The steering group has proposed a detailed, 2 year programme on the following themes: to teach Spanish, develop international relations, etc.

All the Irish partners have had previous experience in the field of cooperation. Based on their experiences, the GAL have formally decided that there would be total parity between the partners. While the Duhallow IRD is in charge of cooperative activities, the project has avoided a too hierarchical organisation, as one can often see in projects where the notion of "head" agency can introduce notions of superiority or inferiority. The 3 GAL have initiated many ideas and the role of cluster is facilitated by it. As a result of the Schola project, one can cite the increase of the fields of cooperation of the 3 GAL, like environmental protection, cultural development...

The international network linkage between Ireland and Spain has generated the biggest added value to the project. The project participants manage and install practical aspects that they have observed and studied in their respective countries. Moreover, they exchange information on political approaches, with the objective of



reinforcing the main supports and participating in a holistic approach in the installation of rural education sites.

The system of Colegios rurales agrupados (clusters of school zones) is active in Spain through the Ministry of Education and Culture. Under this system, the Ministry employs qualified teachers, experts in specific fields: languages, dramatic arts, music, etc. These travel to different rural schools. The system permits the offering of a greater variety of options and completes the competences and expertise of the rural school staff. The experts are also charged with transmitting their competences to the teachers, in order to have a follow up. Moreover, the Ministry facilitates exchanges between schools by the involvement of teachers from the neighbouring schools a few hours a week. The students thus have access to a larger range of options. The CRA system also permits the sharing of administrators between several schools so that the principals are not burdened too much with administrative duties which would hamper their teaching. Since September 2005, the Irish schools have been managed by the CRA system with the resources of the CAPS programme, supported by a grant received from IPPN (Irish Primary Principal's Network).

## **D – Assessment**

### **Budgets and resources**

The total budget is 134.500€. The FEOGA provides 80,000€ and 54,000€ are obtained from the National Public Funds.

While the CAPS has created and developed the project, the LAG have, these 2 last years, secured additional funding from various agencies, including the public sector. The resources provided are not used only for current activities, but contribute to secure over the long term the rural schools as a centre for the local communities.

The GAL have received the help of the project participants to develop relations with the main agencies in order to guarantee support for long-term, cluster activities. The GAL no longer count on LEADER as the only source of funding. Other funding sources support the project, financed at the beginning only by LEADER funds.

### **Staff**

All the activities are supervised by a Project Steering Committee, which brings together representatives of the 3 Irish LAG and the 5 schools. The steering committee of the cluster is chaired by the Duhallow IRD President of the Working Group on Youth and Education and not by one of the participants. This allows the presidency to be neutral and objective, while leaving the entire responsibility for developing the project to the schools. Each GAL has committed itself to allow students, parents, teachers and representatives of communities to participate, in order to widen the impact of the project, with volunteers also playing an important role.

### **Results and evaluation**

Some of the results reported during an independent evaluation are:

- Participation: 5 Irish schools (with 12 teachers) participate in the project (Cloghoola, Cullen, Kilcorney, Kilmurry, Carraig-an-Ime) with 3 partner schools in Spain. In all, 94 children have participated in the programme along with 93 active volunteers.
- The schools have recognised that the benefit of clusters was to have an integrated organisation (all the players were represented), as well as an organisation based on equity between schools (decisions taken by consensus). The other benefits mentioned are better efficiency in responding to problems by working together in a cluster rather than each one by himself: to put together resources to share experts, coordinators, etc., that one school alone could not afford to finance.
- It provided a large range of services (language courses, workshops, field study, etc.) for a great variety of local players.
- Improve the role of the primary school as a factor of rural development.
- Reduce the tendency to isolation in the schools and rural communities.

### **Perspectives**

There is a forum in which the schools can transmit what they have learned among themselves and also transmit it to other sectors like agriculture, community groups...because this approach is very easily transferable.

### **E – Bibliography**

Leader+ pilot projects