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# HUMAN RESOURCE DEVELOPMENT IN SMEs WITHIN THE EUROPEAN SOCIAL FUND IN POLAND – RESEARCH FINDINGS AND INTERNATIONAL PERSPECTIVE

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**Abstract:** The paper aims to examine the Human Resource Development (HRD) in small and medium enterprises (SMEs) funded by the European Social Fund (ESF) in Poland between 2007 and 2013. The research is based on theories that support HRD investment specifically in SMEs, and uses the Human Capital Theory (HCT) with some extensions. The paper addresses the question of public support in HRD and international support for development purposes. Finally it stresses that the support may have national and international implications. The research methodology involved a series of computer assisted telephone interviews (CATI) in a sample of 44 SMEs that received EU funding for HRD. It also included computer assisted personal interviews (CAPI) with experts in the ESF, participant observation and analysis of the project documentation. The findings indicate that the ESF effort of international scope had a positive impact in Polish SMEs.

**Keywords:** Human Resource Development, SMEs, European Social Fund, Poland.

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## 1. Introduction

The paper aims to examine Human Resource Development (HRD) in small and medium enterprises (SMEs) with the funding of the European Social Fund (ESF) in Poland between 2007 and 2013.

The European Social Fund is one of several financial instruments of the cohesion policy. It is especially focused on supporting human resources-related investments. Crucially, the ESF may be assimilated to a public body which provides aid to specific regions, types of persons and types of operations (as will be shown in the next section).

Furthermore, it is well-known from theoretical analysis that Small and Medium Enterprises (SMEs) might seek public support in order to provide training for their employees; this happens because the SMEs might lack the funds or the apparatus to provide HRD for their employees; such a deficiency would be negative for society as a whole. All this suggests that the ESF support for SMEs in Poland might be an important topic for policy and research. Furthermore, it is crucial to note that the ESF is a political instrument designed with an international scope because by using it, the EU aims to provide support to the less developed and more problematic regions. What is

important to note is that the SMEs may use the ESF for strengthening their international stance.

Indeed, SMEs use the funds of the European Social Fund more and more frequently in order to implement different types of training and development projects. The issues of European integration, the cohesion policy and the division of European Union allocations are widely described in the subject literature and ministerial documents. However, little importance is devoted to the characteristics of HRD in SMEs within European Union funds in Central and Eastern Europe (CEE). This paper aims to fill the research gap recognized by the authors.

Having taken all this into consideration, we defined the purpose of this article as: to examine HRD in SMEs with the participation of the European Social Fund (ESF) in Poland during the period 2007-2013.

The research aims to provide well-grounded and elaborate descriptions and explanations of HRD in SMEs within the European Social Fund in Poland. Considering the above mentioned, the purpose of this article is to put forward the answers to the following research questions:

- (1) What were the reasons of the studied organizations to apply for ESF funding?
- (2) What was the financial situation of the SMEs at the moment of applying for the ESF project?
- (3) Would the SMEs have run the training and development projects if they had not qualified for EU funding?
- (4) What were the types of training and development projects funded by the EU?
- (5) How was the analysis of training needs carried out in organizations?
- (6) Who were the beneficiaries of the EU projects?
- (7) How did the SMEs perform the evaluation process?
- (8) What benefits did the SMEs gain from the ESF project?

In order to address these research questions the paper is organised into four sections. The first section describes the theoretical background, the next part presents the methodology, the third section focuses on the results and the discussion on these results and their potential implications, and the fourth section contains the final conclusions and ideas for further research.

## 2. Literature review

### Basic concepts

This section defines the concepts of HRD, SMEs and ESF.

In the literature about Human Resources (HR) there are two very different ways of defining Human Resource Development (HRD). One is a broad way, in which Human Resource Development involves all the efforts made by society to develop and to train Human Resources [Black et al. 2017]. This broad concept includes areas such as basic education, secondary vocational education, and even science and research. Sometimes the OECD, the United Nations and the World Bank use this broad definition. Crucially, the European Social Fund supported operations that relate to secondary vocational education and to science and research, particularly when the country was considered to be less developed and in greater need for those types of investments [European Commission 2018b]. However, it is well known that in HR literature, Human Resource Development [McGuire, Cseh 2006; Swanson, Holton 2008; Gibb 2008] and Employee Development [Massey 2004] basically refer to activities offered by organizations with the intention to balance the benefits for both the worker and the organization.

SMEs are defined as companies that have less than 250 employees and whose business volume is less than 1 million euros, dollars or pounds depending on the currency in which the study is performed [Black et al. 2017].

The European Social Fund is a very specific tool for human resource development. In fact the ESF can be considered an instrument used by the European Union to develop its HRD policies [Tomé 2013]. The objective is to put the ESF in this context, and in comparison with other programs for the development of HR and for HRD that was launched in the OECD countries many years before and that has been recently implemented in developing and emerging economies.

Regarding the socio-economic analysis, there are some important points to be taken into account, namely the role of the State, the international scope, the type of investments and the beneficiaries. First, it is important to note that the ESF is in itself a department of the "EU super-state" governmental body, the European Commission. Second, it is fundamental to understand that given that the recipient countries only have to fund a small (usually around 30% maximum) part of the cost of the operation, the ESF can be assimilated to international aid, similar to that of the World Bank, designated for less developed regions of one of the most developed economic blocks in the world. Thirdly, even if some countries used the ESF for operations linked with education (like funding a network of vocational training schools at secondary school level) and science (funding operations and building facilities for R&D institutions working at university related

levels), the bulk of the funds was devoted to work-related investments made in private organizations for their own workers, or in public organizations for the unemployed. The ESF was also responsible for the installation of a network of consultants in the countries in which it operated. Their task was very important, namely to facilitate the relation between the final user and the administration. All in all, the ESF was fundamental in creating and giving force to the market of employee development in the countries and regions in which it was more present.

### Theories on HRD investment

The investment in HRD by individuals, companies and societies finds support in Human Capital Theory (HCT); according to HCT [Becker 1994], companies should invest in human capital if they believe that investment will be beneficial in the future. The investment has financial and production costs but may be compensated by an increase in output, productivity, sales, exports and market share. This basic fact justifies most human resource management operations. Evidence of the practical importance of HCT reasoning has been widely reported [Yadav 2017; Uaron 2018].

Training may be sometimes a question of survival, also companies may share the costs of training with the trainees if they increase their remuneration. Training may be considered general, transferable or specific and different market formats may exist in each one of those types of training [Becker 1994; Stevens 1996]. In any case, the company effort to provide training is easy to justify. In practice, statistics show that companies in the most advanced economies in the world (like the Nordic countries and Japan) invest the most in the Life Long Learning (LLL) of their employees [OECD 2013].

It is fundamental to note that companies differ in their investment in HRD. In particular there are theoretical reasons for which SMEs differ from other companies. Most of all, there may exist a market failure in funding provision, meaning that the banking system does not trust companies and therefore socially profitable opportunities are not put in place, with the subsequent social loss. This simple idea is at the core of the public subsidization of HRD [Parsons 1990]. Other types of market failures that may happen and hinder companies' investment relate to information problems, availability of technology or certain production factors, absence of capacity of provision in quantitative or qualitative terms [The World Bank 1991]. These market failures may be addressed through the provision of training, funding

(meaning the allowance of subsidies) or building up private capacity [The World Bank 1991]. In times of crisis or growing uncertainty, those market failures may emerge and public intervention may become more pressing. In the specific case of SMEs, public intervention might be justified because they are smaller, face more risk, lack training facilities, may lack information or consulting abilities, and may be refused any form of credit from the banking sector. This is the main reason for which the EU has been trying for a long time to support HRD in SMEs [Tomé 2013].

This problematic issue of funding generates the questions 1 to 3 mentioned in the introduction, namely:

Question 1 – What are the reasons for using the EU funding?

Question 2 – What was the financial situation of the SMEs at the moment of applying for the ESF project?

Question 3 – Would the SMEs run the training and development projects if they did not qualify for EU funding?

The authors' expectations regarding those questions were that the reasons for using EU funding would relate to funding problems, and therefore the operations would not have been done without the ESF.

### Public support for training

In order to solve the funding problems of companies, public programs are usually put in place. Those public operations should address the immediate cause that generated the need for intervention, meaning that a variety of causes should be addressed by a variety of measures, and not only by public provision or subsidizing. Moreover, public intervention in the training market may be characterized by public failures such as red-tape, corruption, lack of control, excessive spending, lack of evaluation, or lack of accuracy when defining the training programs [The World Bank 1991]. A careful examination of the pervasiveness of those public failures and a comparison with market failures are important to define the HR policy and to evaluate it [The World Bank 1991]. This kind of comparative reasoning is important to evaluate the case of support of SMEs in Poland.

The above mentioned supports the next question:

Question 4 – What were the types of training and development projects funded by the EU?

The authors expected that the programs would be dedicated to investment that might generate long-term benefits like an improvement in skills.

### Evaluation of the support for HRD

Training operations like those performed by the ESF may be evaluated in a variety of ways. The program administrators usually favor basic indicators like the number of persons supported, the volume of funds granted, the percentage of funding spent, or what is more complex and less immediate, the employability rate. Those indicators are usually called results indicators [Tomé 2005].

The scientific evaluation of training and development is even more complex. In management science the most important model measuring the effectiveness of training is the Kirkpatrick model [Kirkpatrick, Kirkpatrick 1994], according to which any training operation might be evaluated at four levels: reaction, learning, behavior and performance. In economics, the participants are compared with non-participants in the so-called experimental or non-experimental studies [Heckman et al. 1999]. In this paper we will use the Kirkpatrick methodology and refer to the importance of performing an economic evaluation and its impact on the SMEs in Poland. In that model, four levels of training evaluation were defined: (1) the reaction of the participants and their thoughts about the training experience; (2) the participants' learning and increase in knowledge; (3) the participants' behavioural change and improvement after applying their skills on the job; and (4) the results or effects that the participants' performance has on the business [Kirkpatrick, Kirkpatrick 1994].

### HRD and SMEs previous results

The empirical test of HRD was conducted and summarized in a remarkable paper by Nolan and Garavan [2015]. These authors surveyed the literature on HRD in SMEs from 1994, ending up with a list of 117 publications, of which 11 were theoretical papers, 44 quantitative studies, 35 used mixed method studies and 27 qualitative papers. The main conclusions of the authors were the following:

- (1) HRD was not defined as such by the majority of the authors, but instead they use the terms: 'training', 'development', 'learning', 'competence development', 'informal training', 'formal job-related training' and 'management training and development'.
- (2) Studies analyse HRD practices, organizational climate, system or architecture and also barriers to putting together the interventions.
- (3) Organizational outcomes derive from formal activities rather than from informal ones, and studies mainly use perceptual measures of impact. In the case of competitiveness, sales/employment

growth and business development, there is the difficulty of establishing statistically significant results and cause-effect relations.

With respect to individual outcomes, the SME owner-managers and employees state that informal, on-the-job, experiential workplace methods are the most critical to job competence development due to their context-specific nature, while socialization is decisive in the process of that development.

In addition, HRD practices can have a positive influence on the SME, namely in aspects such as worker motivation, job satisfaction [Huang 2001; Pajo et al. 2010], development of appraisal systems, mentoring and personal development [Beaver, Jennings 2001; Devins, Johnson 2002; Smith et al. 2002] organizational commitment, quality of working life and employee self-confidence [Roffe 2007; Rowden 1995; 2002] and also strategic management, financial management, business development, marketing and HRM [Devins, Gold 2002; Marlow 1998; Massey 2004; Patto, Marlow 2002; Walker et al. 2007; Wightman, McAleer 1995].

There are many well-known studies about factors that favor HRD activities: CEO orientation [Soo-Young et al. 2013] facilitating self-managed work teams [Fazzari, Mosca 2009], innovation capital and social capital, namely, culture in working environment, social interaction within organization, network, and the strength of relations among employees [Kamaluddin et al. 2016].

Following from the previous two sections, the authors derived the last four questions posed in the study:

Question 5 – How was the analysis of training needs carried out in organizations?

Question 6 – Who were the beneficiaries of the EU projects?

Question 7 – How did the SMEs perform the evaluation process?

Question 8 – What benefits did the SMEs gain from the ESF project?

The authors expected that the training needs would have been assessed in order for the funding to be awarded, so that the beneficiaries would be people and organizations who would not otherwise have access to training. The authors were curious about the level of the evaluation process and also about the magnitude of the use of Kirkpatrick's model.

### International consideration for HRD – funding and impact

The analysis provided in this paper has two crossing points with the analysis of HRD within an international scope.

The first crossing point is the type of funding mechanism. In fact, the authors believe that there are grounds to consider that the ESF is an operation of an international scope because the European Union uses the ESF to support some countries; therefore, in theory, the ESF is similar to some funding agencies such as the UN and the World Bank [The World Bank 2018]. This defining characteristic makes the ESF an institution that should receive a lot of attention from HRDI scholars. This interest initiated only a few papers [Tomé 2001; 2012; 2013] while its private counterpart (i.e. MNCs) received much more attention [Haworth 2013; Horwitz 2017; Sablok et al. 2017], however it is a good topic for further research (see below). Some international agencies like the World Bank and UNESCO support education, training and R&D operations in less developed countries [The World Bank 2018]. These operations are defined as international aid. Significantly, the ESF's beginning is linked to the support of regions considered as being more problematic and less developed in the European Union. Currently, to be considered a priority region and to be eligible for receiving a large amount of ESF funding, a country must have a GDP *per capita* of less than 75 percent of the European average. Poland in the 2007-2013 period did not reach that value. Therefore in this paper it is presumed that the operations of the ESF in Poland for HRD in SMEs during the 2007-2013 period, even if they relate to the basic human capital theory, also have to do with some sort of public funding theory, and what is more, are better understood if viewed through the perspective of international aid systems.

The second crossing point relates to the importance of HRD to the success of companies in the context of globalization. The analysis may be easily extended to people and countries and it is very simple to state. With the falling of borders and the availability of technological instruments that put together teams and allow clients to meet providers much more easily than before, people, companies and countries may derive a considerable part of their income from international sources. This allows them to provide internationally traded goods and services much easier than before. In this context, HRD investments are decisive in increasing the value added of the goods and services provided, and also to define the trade specialization of countries, companies and even people. A summary of the relation between HRD, income and trade specialization is presented in Table 1.

Therefore the ESF action in HRD in Poland would be fundamental to increase the volume of value added work and to improve the trade specialization of the country. Again this is a reason for which the ESF

should be studied by scholars in the area of HRDI (see further studies below).

**Table 1.** International consequences of investment in HRD

Countries	HRD	Specialization	Welfare and income Indicators
Africa	Weak	Agriculture	Low income, low HDI
Asia and Latin America	Moderate	Traditional low labour costs industry	Lower medium to medium income and HDI
Eastern and Southern Europe	High	High value added industry	High income and HDI
USA, UK, Japan, Nordic and Central Europe.	Very High	Services	World highest

Source: an analysis based on [Krugman et al. 2018] and statistics of the World Bank [2018].

### 3. Research methodology

#### Approach and sample

The study is exploratory because of the lack of previous research on HRD in SMEs within the ESF in CEE. The study was conducted in 2016 and involved 44 SMEs that received funding from the ESF for training and development activities during the 2007-2013 Programming Phase in Poland. The sample included micro ( $n = 25\%$ ), small ( $n = 27\%$ ) and medium enterprises ( $n = 48\%$ ). Table 2 presents the sample of the organizations.

**Table 2.** Characteristics of survey respondents

Types of enterprises	No. of respondents	Percentage of respondents (%)
Micro enterprises	11	25
Small enterprises	12	27
Medium enterprises	21	48
Total of enterprises	44	100

Source: own research.

The group of organizations selected for this study underwent purposive sampling. It was thoroughly performed with respect to the size of an organization.

The authors of the study applied non-probability, purposive sampling. The criterion for selection was the implementation of at least one EU project for the co-financing of training and development activities

in the financial perspective 2007-2013. A public database of organizations that implemented EU projects was used for the purpose of the study<sup>1</sup>. By narrowing down the criteria of selection, a list of SMEs, which were the potential research objects, was created. Following this step, the snowball method was used. Experts in the field of EU funds helped in reaching organizations that would meet the study criteria. In the end, 44 organizations from across the country qualified for the study. They were diversified by size: micro, small, and medium-sized organizations. This research included sensitive issues, that is the financing of training and development by public funds. The number of companies that refused to participate was not recorded because only those who accepted the proposal were contacted. Anonymity in the research was guaranteed and the respondents knew the objective of the study. The aim of the authors was to ensure that the study population would reflect the composition of all SMEs in Poland, however it is not proportional to the EU funding they received. The percentage of these enterprises in the total number of contracts signed in the perspective 2007-2013 was 90%. Large enterprises constituted 10% of that number. Among the SMEs, 57% were micro, 26% small and 7% medium-sized [Ministry of Development 2017]. This research included all three types of enterprises.

**Table 3.** Profiles of enterprises

Profiles of enterprises	No. of respondents	Percentage of respondents (%)
Manufacturing	20	45
Service	18	41
Commerce	6	14
Total of enterprises	44	100

Source: own research.

While creating the research group other criteria were considered. An important requirement was that the SMEs selected for the study were not homogenous (see Table 3). They varied according to the industry and type of ownership. In this study both Polish and foreign enterprises were assessed. Large corporations employing more than 249 employees or those that are

part of a large corporate group were excluded from the study. The reason for the exclusion was that previous research proved that training and development interventions vary in SMEs and large organizations (see e.g. [Hill, Stewart 1999]).

### Methods/measures

In the study, methodological triangulation was employed [Denzin 1978], which involved a combination of research methods. The purpose of applying methodological triangulation in the study was to increase its validity and obtain a full view of the researched subject through cross-checking the study results. In all, the data was obtained through the following research methods:

- analysis of the project documentation: grant application, application for payment, the statement of audit files of the project, correspondence with the Intermediate Body;
- computer assisted telephone interviews (CATI) with people responsible for the implementation of the project in the organization, which included specialists and directors or company owners and also in-depth computer assisted personal interviews (CAPI), interviews with the experts in spending the funds of the European Social Fund in the 2007-2013 perspective;
- participant observation<sup>2</sup> that involved activities in the managing of a dozen of European projects in the role of a coordinator or a management team member.

The objective of the CATIs conducted with representatives from organizations which received financing was the identification and diagnosis of HRD from the perspective of these organizations. The interviewees were the company owners, project coordinators and training managers who best knew the nature of the training and development projects of the ESF in these organizations. The fundamental research tool in the CATIs was an interview questionnaire with a dominant number of closed questions, yet giving the respondents the possibility of selecting more than one answer. The questionnaire also included semi-open questions which allowed the provision of a full answer to the issues raised in the closed questions.

<sup>1</sup> See more on the contracts for co-financing of the projects from particular Operational Programmes: <https://bdl.stat.gov.pl/BDL/metadata/podgrupy/532#>.

<sup>2</sup> In the period 2008-2018 one of the authors was an applicant and a coordinator of several EU projects financed from the ESF in the perspective 2007-2013 and 2014 -2020. They were designated to SMEs, which allowed the author to obtain access to project documentation and, at the same time, develop a network of contacts with representatives from these enterprises. The participants of the observation were the employees, the direct beneficiaries, and the applicants, namely SMEs. The object of the observation was the process of the development in organizations that received funds for the projects.

The baseline survey asked a number of questions designed to establish the extent and nature of HRD in an ESF project in SMEs in Poland. The respondents could select more than one answer. To obtain answers to the research questions, statistical analyses were carried out using the IBM SPSS Statistics software version 24. It was conducted using a series of chi square tests and One Way Analysis of Variance (ANOVA). The level of significance was assumed  $\alpha = 0.05$ , which means that the results were considered statistically significant at the p-value below 0.05. Thus, the level of certainty was set at 95%.

The purpose of CAPIs was to clarify, justify and elaborate on the research topics. The interviews were conducted with the directors responsible for European funding management and the directors of the consulting companies which, on behalf of SMEs, applied for European funds. Knowing the objective of the research, the interviewees gave their consent to record the interviews. The research tool was an interview with open questions. Altogether, four CATIs were carried out. The questions included in CAPIs asked about application for EU funding and the benefits of the ESF projects from the perspective of institutions managing European funding at regional, ministerial and consulting companies' levels.

#### 4. Results

Below are the results addressing the questions one by one:

##### 1. *What were the SMEs' reasons underlying their application for the ESF funding?*

A high percentage – 84% of the respondents indicated that applying for ESF funds created the opportunity to improve the qualifications of employees, 36% indicated the importance of full (100%) financing of the training activities, and 34% selected the opportunity for increasing the company's competitive advantage.

Analysis of the results assessed the relevance of the particular motives for their application for the funding in relation to the type of an organization (see Table 4). A statistically significant result ( $p = 0.015$ ) was noted in the financial aspects, which were especially important in the case of micro-enterprises.

The research conducted among entrepreneurs in the Małopolskie<sup>3</sup> region who benefited from the support of the ESF, provided similar results. The possibility of improving qualifications and co-

**Table 4.** Opinion of respondents on the types of ESF funding for training and development activities in three groups according to the size of a company

Motives for their application for the funding	Enterprise size			Significance
	micro	small	medium	
Opportunity to improve employees' qualifications	100.0%	66.7%	85.7%	0.089
100% financing of training the development activities	27.3%	41.7%	38.1%	0.754
Persuaded by a consulting company	0.0%	0.0%	4.8%	0.571
Opportunity to increase competitive advantage	36.4%	25.0%	38.1%	0.735
Financial reasons – possibility to decrease operational costs	45.5%	0.0%	14.3%	0.015

Source: own research.

-financing the training were the most frequent reasons for applying for funds for a training project. One more important reason was the opportunity to obtain certificates confirming the acquired skills (87% of responses). The author's participative observation and analysis of the project documents allowed us to reach the conclusion that applying for European funding had become attractive for many consulting and training companies, for which it became an additional or even major business activity. By implementing training projects, they could reduce their operating costs by financing some of their activities with these funds. Research on ESF training projects in Portugal shows that EU funds have had a substantial impact on the supply of training companies. A number of courses for improving qualifications were offered, however, the results of these courses were poor [Tome 2012]. In Poland after the 2007-2013 perspective, when the final consultations regarding the current 2014-2020 programming period were still underway, and therefore the new calls for applications were on hold, many companies had to suspend their activity or reduce it, because their functioning and financing was almost entirely dependent on the EU funding.

##### 2. *What was the financial situation of the SMEs at the moment of applying for an ESF project?*

Interestingly, nearly 80% of the respondents rated their company's financial status as good or very good at the time of application for funding (see Table 5). However, these companies were not always likely to invest their own funds in training. They appreciated the importance of HRD as they decided to apply for

<sup>3</sup> Małopolskie is one of the 16 regions in Poland.

EU funding for this purpose. Yet, when they had to use their own budgets to finance training activities, it was not then viewed as a priority.

**Table 5.** Information about the financial and economic status of the enterprise at the moment of application of EU funding

Financial and economic status of the enterprise	Frequency	Percentage
Bad	1	2.3
Average	8	18.2
Good	23	52.3
Very good	12	27.3
Total	44	100.0

Source: own research.

A similar situation was diagnosed in the UK in companies from the SME sector that received ESF funding. The research shows that training of employees in these organizations was important but it did not have strategic importance for the development of the companies [Keogh, Stewart 2001].

3. *Would the SMEs have run the training and development projects if they had not qualified for EU funding?*

Interestingly, 39% of the respondents opted for a negative answer, which is proof that the EU funds are of great importance for SMEs, while 57% of the study participants expressed the opinion that they would launch development activities, but on a smaller scale. Only 4% of the respondents would carry out these activities even without co-financing. This is confirmed by the studies of other researchers from the SME sector, who show that high costs are the main obstacle to delegating highly qualified employees to training [Kubisz 2010]. Research shows how important EU funds were for the development of employees and their organizations. Without co-financing from the ESF, less than half of the companies would have not achieved the training goals. A study on the evaluation of the effectiveness of ESF support shows that three-quarters of training courses would not have taken place if the employer or employee had been obliged to cover the cost of participation [Ministry of Development 2017].

4. *What were the types of training and development funded by the EU?*

More than half (57%) of the respondents took part in human resource management training in different areas of HR. Foreign language training (55%), computer training (52%) and managerial (50%) were very popular. 36% of employees participated in finance

training and 30% in counseling. In addition, the EU grants funded legal training (25%) and coaching and mentoring (23%).

The data are not significant according to the size of the SME but larger SMEs behave in a different way compared to the smaller ones. Medium enterprises would more often choose HR (71.4%) and foreign language training (66.7%). In small enterprises managerial training (66.7%) and IT (58.3%) were dominant. Micro companies were diverse in their training decisions (see Table 6).

**Table 6.** Information about various types of training in three groups of enterprises within the ESF project

Types of training within the ESF project	Enterprise size			Significance
	micro	small	medium	
Foreign languages	45.5%	41.7%	66.7%	0.299
IT	45.5%	58.3%	52.4%	0.826
Financial	36.4%	41.7%	33.3%	0.892
Legal	27.3%	25.0%	23.8%	0.977
Managerial	36.4%	66.7%	47.6%	0.333
HR	45.5%	41.7%	71.4%	0.171
Counselling	9.1%	50.0%	28.6%	0.099
Bachelor, master and postgraduate studies	0.0%	0.0%	4.8%	0.571
Coaching, mentoring	18.2%	16.7%	28.6%	0.674

Source: own research.

Table 7 presents a comparison of the average number of training courses implemented in enterprises. In order to check whether the size of the enterprise influences the number of completed training courses in different areas, a one-way variance analysis for the independent samples was performed but the ANOVA statistic was not significant (see Table 7).

**Table 7.** Comparison of the average of the training initiatives in enterprises according to their size

	Micro		Small		Medium		Significance
	M	SD	M	SD	M	SD	
Number of training initiatives	3.18	2.40	3.83	2.29	4.00	2.00	0.599

M – mean / median; SD – standard deviation.

Source: own research.

Participant observation as well as documentation analysis revealed that training in the areas of IT and foreign languages were the most interesting



to applicants from both the private and public sectors in the perspective 2007-2013. In the current programming period 2014-2020 there were calls for projects dedicated specifically to these types of training.

##### 5. How was the analysis of training needs run in the organization?

Most of the staff indicated the training in which they would be interested in the EU project (64% of responses). In over one-third of the organizations (36%), supervisors assigned their staff to training. Only 25% of the training cases resulted from professional development plans and 2% from regular staff appraisal.

Analyzing the respondents' answers to this question, it can be noticed that in answer 1, the distribution of responses is different but not statistically significant. In micro-enterprises, employees more often (81.8%) than in small (66.7%) and medium (52.4%) companies indicated in which training they were interested. Statistically significant difference (p-value below 0.05) is observed in answer 2.57% of the respondents from medium-sized enterprises indicated the role of supervisors in encouraging and delegating employees to training. This is related to the functioning of the HR department, which in medium-sized enterprises, at least partially, prepared data on training and development needs (see answer 5 in Table 8). Identification of training needs that resulted from employee evaluation was minor, similarly to the organization's career development plan for employees (see answers 3 and 4 in Table 8).

On this basis, it can be concluded that the ESF training and development projects took place on an occasional basis and their themes range was defined without linking it to other elements of the personnel function, such as performance appraisal. OECD research carried out among 511 SMEs in Poland shows that most of the enterprises did not have training plans, and only 20% had budgets for development activities [Kubisz 2010].

The results of research concerning human resource development in international enterprises in Poland, show that training needs are identified similarly, mostly based on the conclusions of the employee or their supervisor (97% of responses). Yet, to a larger extent, they are determined based on the results of employee evaluations (in 51% of enterprises), and in 34% they result from a career development plan [Suchodolski 2008]. Therefore it can be concluded that training and development projects financed by the ESF were rather ad hoc than systemic and were unrelated to other elements of the personnel function.

**Table 8.** Opinion of respondents on the ways of identifying training and development needs in three groups of companies within the ESF project

Ways of identifying training and development needs	Enterprise size			Significance
	micro	small	medium	
Employees indicated in which training they were interested	81.8%	66.7%	52.4%	0.250
Supervisors applied for their employees training	9.1%	25.0%	57.1%	0.017
They resulted from the career development plan	45.5%	8.3%	23.8%	0.120
They resulted from employee evaluation	0.0%	0.0%	4.8%	0.571
HR department prepared data on training and development needs	0.0%	0.0%	19.0%	0.090
The owner/managing director defined the training needs	18.2%	25.0%	9.5%	0.491
Training needs were evaluated once for the purpose of the EU project	9.1%	0.0%	0.0%	0.215
Other	18.2%	16.7%	14.3%	0.956

Source: own research.

A review of the projects' documentation reveals that the applications for funding were prepared in response to the requirements of a specific call for projects, taking into account the criteria for which the potential applicant could receive additional points, and not considering the actual training needs. There were, therefore, projects in which 50% of the support was targeted at people over 50 or living in rural areas. The extra points for meeting these two criteria encouraged the applicants to target these specific groups.

##### 6. Who were the beneficiaries of the EU projects?

More than two-thirds (68%) of the projects that were the subject of the study were directed to all employees, 23% to managers and senior executives, 18% to specialists and 14% to lower-level employees. In one of the CAPs, an expert from the Intermediate Body pointed out that an appealing advantage of the ESF training projects was their comprehensiveness. In practice, this translated into the possibility of financing both vocational and general training for the staff.

### 7. How did the SMEs run the evaluation process?

The vast majority (82%) of the staff responded that training effectiveness was tested, while 18% provided a negative response. The following stage of the research aimed to verify whether the size of the enterprise had an influence on the evaluation of the effectiveness of training and development activities. No statistical significance was noted in this matter (see Table 9).

**Table 9.** Number of answers on the evaluation of the effectiveness of training and development activities depending on the size of enterprise

Evaluation of the effectiveness of training and development	Enterprise size			Significance
	micro	small	medium	
Yes	81.8%	75.0%	90.5%	0.491
No	18.2%	25.0%	9.5%	

Source: own research.

Later, the respondents were asked to indicate the ways the training effectiveness was evaluated based on D. Kirkpatrick's model, where 49% of the staff responded that the level of reaction was investigated and 45% of the respondents were of the opinion that the effects of training were verified on a learning level, while only 17% on a behavioral level. In 64% of micro enterprises the effectiveness was most often evaluated via questionnaire; 67% of small companies carried out testing that checked an increase in knowledge. Medium enterprises however, used the testing at three levels of reaction, learning and behavior (43%, 33%, and 22%, respectively). The fourth level Return on Investment (ROI) was not evaluated in any of the researched objects (see Table 10).

The response level is most often verified by the questionnaire that the trainees fill in after completion of training. This is also required at the control stage by both the organization implementing the project and the training institution. Based on this, it can be verified whether the employees remember that they participated in the study at the level of reaction. Yet the question remains as to whether this was a procedural requirement of the EU projects or that the SMEs and local governments were actually interested in the reaction of the participants about the training. The practice of organizations operating both in Poland and worldwide shows that research on the effectiveness of training and development programs is most commonly carried out at level 1, i.e. reaction level. On this basis, the managerial staff draws conclusions about conducting employee development policy in

**Table 10.** Number of answers given on the question on the evaluation of effectiveness of training and development activities based on the size of enterprises

Evaluation of effectiveness of training and development activities	Enterprise size			Significance
	micro	small	medium	
Questionnaire	63.6%	41.7%	42.9%	0.474
Testing knowledge on particular subjects	36.4%	66.7%	33.3%	0.154
Changes in behavior were observed	0.0%	16.7%	33.3%	0.079
ROI (Return on Investment) was calculated	not selected			
Other	27.3%	8.3%	14.3%	0.445
Not applicable	18.2%	25.0%	9.5%	0.491

Source: own research.

the organization. If the participants' satisfaction is high, it is regarded that the employees' qualifications improvement program enhances the quality of human capital, which contributes to the competitiveness of the organization. Research shows that the evaluation of programs only at the level of reaction brings a limited value. There is a need to evaluate program effects at other levels in order to examine its effectiveness and efficiency [Danielewicz 2014].

### 8. What benefits did the SMEs gain from the ESF project?

The final step of the research procedure was to answer the question of whether the respondents benefited from participation in the ESF project, 97.7% selected a positive answer. Among the answers, the most frequent benefits were: improvement of employees' skills (81% of responses), increase of work efficiency (31%) and increase in the company's competitive advantage (31%). In order to establish the correlation between the size of the enterprise and the benefits from participation in the ESF training project, a calculation using a series of chi square independence tests was performed. The statistically significant result ( $p = 0.014$ ) was noted in the case of answers: 'there was an improvement in opportunities for internal and external cooperation' and 'the company's image on the labor market improved' ( $p = 0.018$ ). These answers mainly concern small enterprises (see Table 11).

What is more, according to the experts from the consulting companies with whom the CAPIs were conducted, these projects allowed the enrichment of skills and knowledge in the field of project

**Table 11.** Opinion of respondents on the benefits from participation in training financed by the ESF in three types of enterprises according to their size

The benefits from participation in training financed by the ESF	Enterprise size			Significance
	micro	small	medium	
Increased employees productivity	54.5%	8.3%	28.6%	0.052
Improved employees skills	72.7%	83.3%	85.7%	0.656
Increased motivation and engagement levels	18.2%	16.7%	28.6%	0.674
New jobs created	0.0%	0.0%	14.3%	0.172
Improved company's competitive advantage	18.2%	33.3%	42.9%	0.375
Improved quality of work	45.5%	25.0%	19.0%	0.275
Improved customer satisfaction	9.1%	0.0%	9.5%	0.546
Improved quality of internal communication	0.0%	16.7%	19.0%	0.308
Increased opportunities for internal and external cooperation	0.0%	25.0%	0.0%	0.014
Improved company's image	0.0%	33.3%	4.8%	0.018
Financial benefits	27.3%	0.0%	4.8%	0.048
Hard to say	Not selected			

Source: own research.

management. Companies that did not previously manage such a large budget also received co-financing. They had to constantly monitor results and keep to the deadlines set in the project budget. Regardless of whether an employee is to be employed in public administration or private corporation, skills and experience in the field of EU projects are always an advantage in the recruitment process. Special attention was drawn to the fact that the organizations could reduce their expenses by offering their employees obligatory training to obtain professional qualifications and certificates, which are all financed by European Union funds.

## 5. Discussion

This paper reports on a study on 44 managers of SMEs in Poland. While the results cannot be generalized due to the limited size of the sample, they may be indicative of some trends. Those findings describe a very interesting way of managing training operations by Polish SMEs. Worthy of note, on one hand, is that the SMEs report benefits that are quite in line with the Human Capital Theory (i.e. improvement of employees' skills, increase in work efficiency and increase in the company's competitive advantage); this is also in accordance with the traditional theory as those benefits arose from activities focused on human resources management, IT, foreign languages, legal and managerial competences. In addition, the projects were mostly addressed to employees who were very interested in participating and the SMEs stated that they used the ESF because they wanted to upgrade their employees skills. On the other hand, even though the financial status of the companies at the moment of application was good or very good, only half of the enterprises would have not implemented the project if it had not been financed by the EU. Moreover, the operations were evaluated partially at the level of reaction and learning, and marginally at the level of behaviour. All this leads the authors to believe that in Poland, just as in Portugal, two logics co-exist in the ESF. The economic logic that relates investments to outcomes, and the absorption logic that results in the projects being made by affluent companies and for affluent people, with not so much care for the evaluation of the operations. This is an issue the ESF should reflect upon.

Furthermore, there are some limitations linked to the use of EU funding for HR development:

1) One important factor is variability over time. Training and development projects prepared at a given point in time, and implemented, for example, after one year, may not correspond to the real needs which have changed in their meaning, due to the prolonged assessment of applications.

2) The implementation of EU projects financed by the ESF related to development activities is also strongly conditioned by the application for co-financing and a contract for co-financing signed with the intermediary. This is because of the main risks which relate to payments that are transferred to applicants in tranches, only after the full documentation of all costs incurred is submitted. In practice this translates into providing own finances or pre-financing the project to secure its smooth implementation. For micro and small companies this may induce problems with lack of financial liquidity

and public procurement. Adhering to the public procurement law and the provisions in the contract for co-financing (which are more restrictive than the public regulations), often determined the choice of the supplier of goods or services that was the cheapest, yet often of insufficient quality.

3) The participants in projects, the so-called final beneficiaries, play an important role in the projects. The problems arising in this area concern: lack of interest in the training offered in the project, refusal to sign the training contract by some employers, inability to obtain the intended number of project participants, inability to protect against resignations by project participants and the dishonest behavior of project participants, e.g. resigning at short notice.

The substantial number of organizational threats has caused and continues to evoke discouragement and disappointment in the implementation of projects. After the final settlement of projects many enterprises were "relieved" that the project was formally completed with success.

Regardless of the critical remarks about the implementation of the European Social Fund in Poland (see [Kwiatkowska-Ciotucha 2013, p. 260]), it is worthy to note the great importance of EU funding in the development of employees and managers of SMEs.

The authors are aware of the limitations of their own study which can also constitute potential directions of future exploration into the topic. The reason for applying a purposive sampling in this study was because it was difficult to convince the organizations to participate due to the nature of the researched problems and analyzed issues. In future it would be worth attempting to apply probability sampling and increasing the numbers of participants in particular research groups.

The participants of the interviews held mainly Bachelor's and Master's degrees and were in managerial positions or were self-employed. In future studies it would be interesting to include persons with secondary and lower education, especially that low numbers of adults participate in further education in Poland.

The authors' explorations were in a sense a sensitive issue, as they regarded human resource development funded or co-funded with public finance. Every such study is burdened with the risk of so-called social desirability bias. This is the need to create a particular picture of oneself and an organization for other people, so it would be compliant with their expectations [Collins et al. 2015]. The authors attempted to solve this issue by providing full anonymity, thus it is presumed that the responses

of the participants were true. Nevertheless, in future explorations it would be necessary to use other means to prevent a social desirability bias.

To sum up, it can be noted [Barcz et al. 2012] that the ESF in SMEs triggered a leverage effect, increasing the level of national resources. They ensured financial stability in the implemented projects in the perspective of several years, especially since the majority of the projects in the study had a time frame of over one year. What is more, they encouraged organizations to start making plans for the next programming period, thus becoming a strong driver for the development of training activities. Finally, they improved learning outcomes through the exchange of experience and best professional practices.

## 6. Conclusions

The results of the research helped to draw the following conclusions as to each of the eight questions posed in the introduction:

- (1) The two important reasons for which SMEs wanted to implement ESF projects was to improve the qualifications of employees, and the 100% financing of training the development activities.
- (2) The financial status of the companies at the moment of application was good or very good.
- (3) Nearly half of the enterprises would not have implemented the project if it was not financed by the EU.
- (4) Most of the employees indicated the training they were interested in as part of the EU project.
- (5) The dominant types of projects were training in: human resources management, IT, foreign languages, legal and managerial competences.
- (6) Training and development projects financed by the ESF were mostly addressed to all employees.
- (7) Effectiveness of training and development activities was evaluated partially at the level of reaction and learning, and marginally at the level of behaviour.
- (8) The most frequent benefits of ESF projects for SMEs were: the improvement of employees' skills, increase in work efficiency and strengthening of the company's competitive advantage.

Despite the significance of this issue, so far in the subject literature, no attempt has been made to comprehensively analyze human resource development in SMEs resulting from the EU subsidy. The impact of European Union funds on human resource development in the literature is mainly projected in macroeconomic categories. The perspective of the organization has not been studied so far. It can therefore be concluded that there has been a noticeable gap in knowledge

in this particularly important area of human resource management, which the authors of this article have attempted to fill.

The subject of this study is for the authors a source of inspiration for further research into this area. First of all, it is worth conducting comparative analyses of spending ESF funds on human resource development in the new Member States, as it allows an assessment in the areas of ESF spending and the achieved results. Secondly, it is worth verifying whether the problems that existed in specific Member States, occurred or are present in other European Union countries. They include the issues such as the paradox of absorption logic characterizing the use of EU funds in Portugal and the large number of training services of dubious quality offered by consulting and training companies whose survival depends on subsidies [Tomé 2012]. Thirdly, an interesting direction of research may be the exploration of spending on the development of human capital by other programs or funds, not only within the European Union, but for example from the Norwegian Financial Mechanism, the EEA Financial Mechanism or the World Bank, to make an assessment of the management system adopted by these institutions and to compare these systems with those implemented by the European Union. The fourth point is that the analysis could be made for the period 2014-2020, in order to see if the situations found in this paper have continued or changed. The fifth thought is that the Polish experience in SMEs regarding the ESF could be compared with other similar countries, namely the Visegrad countries [Tomé, Tracz-Krupa 2018]. Finally, from the Polish perspective, a comparison could be made between the SMEs' experience of the ESF and the experience of multinationals. To recap, it is necessary to conduct further theoretical and empirical research on the development of human resources in SMEs with the use of external resources, as it will not only enrich scientific knowledge and rationalize the research methodology, but it will also allow the formulation of useful recommendations for business.

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## **ROZWÓJ ZASOBÓW LUDZKICH W MŚP ZE ŚRODKÓW EUROPEJSKIEGO FUNDUSZU SPOŁECZNEGO (EFS) – WYNIKI BADAŃ EMPIRYCZNYCH I PERSPEKTYWA MIĘDZYNARODOWA**

**Streszczenie:** Celem niniejszego artykułu jest zaprezentowanie wyników badań empirycznych dotyczących rozwoju zasobów ludzkich w MŚP w ramach środków z Europejskiego Funduszu Społecznego (EFS) w Polsce w perspektywie 2007-2013. Teorię bazową do rozważań stanowi teoria kapitału ludzkiego. Artykuł dotyczy pytania o wsparcie publiczne na rozwój zasobów ludzkich oraz wsparcie międzynarodowe na cele rozwojowe. Autorzy podkreślają, iż może mieć ono implikacje krajowe i międzynarodowe. Badania przeprowadzono na grupie 44 MŚP, które otrzymały wsparcie na rozwój zasobów ludzkich z EFS. Analizy dokonano z użyciem ankiety z kwestionariuszem jako narzędziem. Ponadto w badaniach wykorzystano opinie ekspertów z zakresu EFS, z którymi przeprowadzono wywiady osobiste, zastosowano też analizę dokumentacji projektowych. Z przeprowadzonych analiz wynika, iż wsparcie z EFS miało pozytywny wpływ na MŚP.

**Słowa kluczowe:** rozwój zasobów ludzkich, MŚP, Europejski Fundusz Społeczny, Polska.