

EQUAL

Community Initiative Programme

FOR POLAND

Community Initiative

E Q U A L

Ministry of Economy, Labour and Social Policy

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1. INTRODUCTION AND EXECUTIVE SUMMARY OF UNDERLYING PRINCIPLES OF THE COMMUNITY INITIATIVE EQUAL

1.1 What EQUAL is for?

Community Initiative EQUAL forms part of the European Union strategy to create more and better jobs and to make sure that no one is denied access to these jobs. As the Community Initiative of the European Social Fund, EQUAL is the learning platform that finds new ways of achieving the policy objectives of the *European Employment Strategy and Social Inclusion Process*. EQUAL differs from the mainstream European Social Fund programmes since it is a laboratory to develop and test new ways of tackling discrimination and inequality in the labour market. EQUAL presents evidence of good practice for these innovative approaches, with an emphasis on active co-operation between Member States, thus ensuring that the most positive results are adopted and shared across Europe.

EQUAL operates in nine thematic fields. Eight of the themes are defined in the context of priorities of the *European Employment Strategy* (EES). The ninth covers the specific needs of asylum seekers. Overall, the aim of the thematic approach is to explore new ways of tackling the problems common to different types of discrimination and inequality, rather than focusing on specific social groups.

- A. Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all
- B. Combating racism and xenophobia in relation to the labour market
- C. Opening up the business creation process to all by providing the tools required for setting up in business and for the identification and exploitation of new possibilities for creating employment in urban and rural areas
- D. Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs
- E. Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market
- F. Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies
- G. Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services
- H. Reducing gender gaps and supporting job desegregation
- I. Supporting the social and vocational integration of asylum-seekers

Community Initiative EQUAL is implemented through strategic partnerships called Development Partnership (DP). The basic principles of EQUAL are the following: thematic approach, partnership, empowerment, transnational co-operation, innovation and mainstreaming. These principles have been described in more detail in chapter 4 of this document.

Measures implemented in Poland under EQUAL Initiative complement measures implemented under the *Sectoral Operational Programme Human Resources Development* and the *Integrated Regional Operational Programme*. The main differences between Community Initiative EQUAL and the mainstream ESF programmes are the following:

- EQUAL is implemented by Development Partnership – innovative instrument in solving labour market problems,
- EQUAL activities are aimed at solving discrimination and inequality problems, which affect the most vulnerable groups on the labour market, often threatened by social exclusion,
- the Programme involves disadvantaged groups in the process of seeking solutions of problems, which affects them,
- additional advantages are connected with transnational co-operation, new types of transnational partnerships are created, experience is exchanged and good practices are disseminated in the European dimension,
- the Programme allows testing new solutions and demonstrating the advantages of the innovative approaches tested,
- the Programme assumes the development of new forms of activities and co-operation in dissemination and mainstreaming of good solutions.

The Programme directly refers to such documents as the *National Strategy of Employment Growth 2000-2006*, *Joint Assessment Paper (JAP) on the Polish Employment Policy* and the *Joint Inclusion Memorandum on Social Inclusion*. Basing on challenges formulated in these documents EQUAL is aimed at supporting employment and social policy implementation by working out and dissemination of innovative methods and tools of impact. The co-operation of partnerships within the European Union under the transnational networks of co-operation will have an impact upon the development of the *European Employment Strategy*.

1.2 What is this document?

This document as the *Community Initiative Programme* lays down the scope and principles of implementation of Community Initiative EQUAL in Poland in the years 2004 – 2008.

1.3 Description of the programming process

For the purpose of works on the Programming Document for EQUAL the Department of Pre-Accession and Structural Programmes (presently: Department for ESF Management) created in December 2002 a Working Group for EQUAL. The Group is composed of representatives of the Ministry of Economy, Labour and Social Policy (Labour Market Department, Social Welfare Department, Department of Public Utility, Office of the Government Plenipotentiary for Persons with Disabilities, Department of Economic Analyses and Forecasting, Labour Law Department), Ministry of National Education and Sports, Ministry of Internal Affairs and Administration, Secretariat of the Government Plenipotentiary for the Equal Status of Women and Men, Foundation of Socio-Economic Initiatives, Polish Scouts Association, Polish Humanitarian Action, Office for Repatriation and Aliens, State Fund for Rehabilitation of Persons with Disabilities. The works of the Group are co-ordinated by the Department for ESF Management at the Ministry of Economy, Labour and Social Policy. Representatives of the non-governmental organisations have been also invited to works on EQUAL. NGOs in the Working Group: Foundation of Socio-Economic Initiatives and Polish Scouts Association, have been proposed by the Contact Group attached to the Minister of Economy, Labour and Social Policy.

The starting point for works on the programming document for EQUAL was SWOT analysis on labour market in Poland, the same, which had been earlier a basis for programming activities under the *Sectoral Operational Programme Human Resources Development* and activities related to human resources development within the *Integrated Regional Operational Programme*. Additionally, the Ministry of Labour and Social Policy has contracted out to the Institute of Labour and Social Affairs the *Labour market analysis in a context of discrimination and inequality* and the *Analysis of a problem of levelling up the labour market opportunities of refugees*, as well as the document on *Equal opportunities of women and men in the context of fighting all forms of discrimination and inequality on the labour market*.

On the basis of these documents and in view of the relevant policy strategies as well as in consultation with partner institutions involved in social and employment policy implementation, the working group has proposed 5 themes for the implementation under EQUAL. The Managing Authority endorsed this proposal to build the EQUAL strategy around the following themes:

- 1/A. Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all
- 2/D. Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs
- 3/F. Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies
- 4/G. Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services
- 5/I. Supporting the social and vocational integration of asylum-seekers

When selecting and defining the thematic scope of the Community Initiative EQUAL in Poland, the Working Group also considered the following:

- the short period of EQUAL implementation in Poland and connected concentration of resources and the scope of actions, as well as the necessity to ensure the flexible implementation system,
- comments of the European Commission, DG Employment and Social Affairs,
- comments submitted in the course of social consultations, which aimed at taking into consideration, in themes' selection, the interest of Polish institutions and organisations in proposed themes, as well as their hitherto experience in implementation of DPs aimed at combating labour market discrimination and inequality.

The necessity of ensuring complementarity of programmed actions in relation to actions under the main programmes of the *European Social Fund* also justifies the limited number of themes. Entrepreneurship development is one of measures planned for implementation under the *Integrated Regional Operational Programme*, and for this reason the Community Initiative EQUAL focuses on supporting the Polish model of social economy, contributing to the extension of hitherto instruments (Social Inclusion Centres) by including innovative methods of taking advantage of social economy in activities aimed at increasing access to employment. Besides, the *Community Initiative Programme* takes into consideration issues connected with entrepreneurship development through activities aimed at working out effective mechanisms of development of and support for women's entrepreneurship under theme 4/G. As concerns theme E - *Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market*, its elements have been incorporated to all

selected themes, and raising qualifications and education level, as an instrument of eliminating labour market inequality, as well as the instrument of ensuring participation in the development of information society, is one of the priorities of EQUAL programme in Poland. Actions under the Community Initiative EQUAL at the same time complement measures in the field of lifelong learning development of the *Sectoral Operational Programme Human Resources Development* and the *Integrated Regional Operational Programme* by focusing on the most vulnerable groups on the labour market.

In the programming process of the Community Initiative EQUAL in Poland cooperation was maintained with experts of the Managing Authority of the Community Initiative EQUAL in Finland within the framework of Phare 2001 project *Development of competencies in the field of European Social Fund programming and management*. Experts supported works on the draft *Community Initiative Programme* from the beginning of the programming process, submitting comments on each version of the document. Besides, Finnish experts prepared many analyses to support the process of implementation of the Community Initiative EQUAL in Poland. Expertise related, inter alia, to the responsibilities of the Managing Authority and the National Support Structure, possible systems of national co-financing of the programme, the system of financial flows, also within the framework of Development Partnerships, as well as drafting application forms and monitoring reports.

When describing the programming process, also the role of ex-ante evaluator should be mentioned in delimiting the scope of individual themes and identification of areas, where measures under EQUAL may contribute to the improvement of situation of persons experiencing labour market discrimination or inequality.

Taking the above into account, the *Community Initiative Programme* lays down the objectives and the scope of actions within the framework of five themes determined for the Community Initiative EQUAL. However, within the framework of selected themes and its added value, actions belonging to the scope of other themes could also be envisaged. It relates in particular to theme B. *Combating racism and xenophobia in relation to the labour market* and theme H *Reducing gender gaps and supporting job desegregation*. Issues connected with combating xenophobia and racism have been incorporated to themes 1/A and 2/D through focusing on problems connected inter alia with labour market discrimination and inequality experienced by the Roma population, refugees and repatriates.

Reducing gender gaps is a horizontal issue in the whole programme, including its five selected themes. Counteracting job segregation is one of positive actions in favour of women under theme 4/G.

1.4 The consultation process

Each of institutions composing the Working Group plays a double role. On the one hand they take active part in drawing up the programming document and on the other hand their task is to consult non-governmental organisations, with whom they co-operate on an everyday basis.

At an early programming stage, when the Working Group was selecting measures for implementation, it consulted around 200 non-governmental organisations. The objective of consultations carried out at this programming stage was to incorporate to the thematic scope of the Community Initiative EQUAL in Poland the needs of institutions and organisations active in combating labour market discrimination and inequalities, as well as earlier experience, including the supra-national cooperation, being one of conditions for effective programme implementation. In January 2003 the members of the Working Group delivered to non-governmental organisations and institutions functioning in the area of social welfare and labour market (with whom they cooperate on everyday basis) an information on the

Community Initiative EQUAL, with request for notifying potential interest in actions within the framework of individual themes.

Positive replies, expressing interest in the works on EQUAL Initiative, and sometimes even DP proposals have been submitted by 75 organisations. Taking into account their replies, expressing concern in individual thematic fields, and basing on the labour market analysis in a context of discrimination and inequality, the Working Group selected themes and measures for EQUAL in Poland.

With the view to consult the scope and structure of the document before its submitting to the European Commission, in September 2003 the draft *Community Initiative Programme* was consulted with the members of the Working Group as well as with following institutions:

- Department for Structural Policy Co-ordination within the Ministry of Economy, Labour and Social Policy,
- Foreign Assistance Funds Department within the Ministry of Finance,
- Voivodship self-governments (and within their structures - Voivodship Labour Offices),
- Social partners – organisations representing employers and employees (the Confederation of Polish Employers, the National Commission of the Independent Self-Governing Trade Union „Solidarność”, the All-Poland Alliance of Trade Unions, the Business Centre Club, the Trade Unions’ Forum),
- Joint Commission of the Government and Territorial Self-Government,
- Polish Craft Association,
- Rural Gminas Association of the Republic of Poland,
- Polish Poviats Association,
- National Cooperative Council,
- Association in favour of NGOs Forum,
- Polish NGOs Office in Brussels.

The draft document received a positive opinion of all the concerned. Many organisations expressed an interest in participation in programme implementation, at the same time emphasising the importance of selected themes for the improvement of situation of persons experiencing inequality and discrimination on the labour market in Poland.

Since September 2003, the works on programme documents, mainly the Programme Complement, have been carried out in five working groups, respectively for each action. At the stage of developing more detailed provisions on types of activities, methods of EQUAL implementation, evaluation of impact, it is necessary to separately approach each topic. Inviting appropriate partners from the central governmental institutions, but also self-governmental institutions, NGOs, education and training institutions, social partners – programming of actions takes the form of social consultation, plays an informative role and contributes to implementation of partnership and empowerment principles.

To inform the population, the Department for ESF Management put a general information on EQUAL Initiative, as well as an information on progress of works on EQUAL in Poland, at the website of the Ministry of Economy, Labour and Social Policy, and also put such information to Ministry publications – “Labour Market” and “Personnel Service”. The staff of the Department took part in many meetings, seminars, conferences devoted to implementation of European Social Fund, including EQUAL Initiative. Besides that information on EQUAL has been disseminated through umbrella organisations, such as the Polish NGOs Office in Brussels, Warsaw Office, using a website of the Office and taking advantage of meetings and trainings for the members of organisations.

In March and April 2003 the National Training Centre of the European Social Fund organised 8 trainings on EQUAL Initiative for members of the Working Group and for non-governmental organisations, employment service, Poviats Centres of Family Assistance, social partners, the State Fund for Rehabilitation of Persons with Disabilities, Voluntary Labour Corps. Training sessions were held not only in Warsaw, but also at a regional level. They will be continued.

1.5 Duration of the Programme

The Programme of EQUAL Initiative will be implemented in Poland within the years 2004 – 2006. Under the principle N+2 the period of expenditures' eligibility will last till 31 December 2008.

1.6 Geographical coverage of the Programme

EQUAL Programme will cover the whole territory of Poland.

2. LABOUR MARKET

2.1 General information

The objective of this chapter is to present a general outline of the labour market situation and to indicate the most important factors that affect it. On this background more detailed description of the situation of individual groups in a context of labour market inequality and discrimination, together with examples of hitherto activities undertaken in favour of these groups, will be presented in the second part of this chapter. This analysis will form a basis for the selection of directions of measures to be implemented under the Community Initiative EQUAL.

2.1.1 General economic context

Poland is among large European countries. Its population accounts more than 10% of total population of the current European Union. This potential is not proportionally translated into the economic potential – the value of GDP generated in Poland in 2003 corresponded to 2% of GDP generated by all EU countries.

The structural transformation of the Polish economy started in 1989 made possible a replacement of economic model based on central steering institutions by market mechanisms and the economy opened to international competition. Many important changes of structural character have been introduced. All these factors allowed for high rate of economic growth in the second half of 1990s.

Rate of growth of Poland, measured by GDP dynamics, has been recently significantly higher than in EU countries. Between 1995 and 2003 the average annual increase of GDP for all EU countries was 2.1%, while for Poland it was almost twice as high (4.3%). It should be mentioned that the lower rate of economic growth in the world, which has been recently observed, also negatively affected Poland. Within 2001- 2002 the rate of economic growth dropped more than in EU countries. The end of 2002 and 2003, however, brought about significant improvement of the economic situation. It is estimated that in 2003 dynamics of economic growth in Poland will exceed the level of 3,5% and in 2004 will reach the level of 5%.

Higher dynamics of economic growth in Poland are also reflected in bridging the standard of living gap between the Polish society and EU population. The living standard of nationals of individual countries may be compared inter alia by the value of GDP per capita calculated by means of purchasing power parity. In 1995 this value in Poland corresponded to 34.4% of average level in EU countries. And in 2003 this value accounted for 44,4%. However it should be noticed that the level of Poland's GDP is low in comparison with other candidate countries. The highest GDP level, compared to EU average in 2003, was noted in Cyprus – 79,2%, and in Slovenia – 69,0%, while the lowest – in Latvia – 38%.

The slow but systematic process of bridging the gap between Poland and the European Union is also observed in labour productivity. Its value, measured as GDP value per one person employed according to purchasing power parity, as compared to the value in European Union, was 37.2% in 1995, and in 2002 as much as 50.5%. This means that the Polish employees work more and more effectively and productively, among others thanks to changes in work organisation and technological changes.

Table 1. Primary macroeconomic indicators (changes against the preceding year, in percent)

Specification	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004*	2005*
GDP	7.0	6.0	6.8	4.8	4.1	4.0	1.0	1.4	3.7	5.0	5.0
Domestic demand	7.0	9.4	9.1	6.3	4.8	2.8	-1.6	0.9	2.4	5.0	5.3
Individual consumption	3.3	8.6	6.9	4.8	5.2	2.8	2.1	3.3	3.1	3.8	4.3
Gross expenditure on fixed assets	16.5	19.7	21.7	14.2	6.8	2.7	-8.8	-5.8	-0.9	12.2	11.5
Consumer prices	27.8	19.9	14.9	11.8	7.3	10.1	5.5	1.9	0.8	2.2	2.3
Imports	20.5	28.0	22.0	14.6	4.4	10.8	3.2	7.3	8.0	9.1	9.2
Exports	16.7	9.7	13.7	9.4	2.0	25.3	11.8	8.3	9.0	9.0	9.0

* Forecast

Source: Central Statistical Office, Ministry of Finance

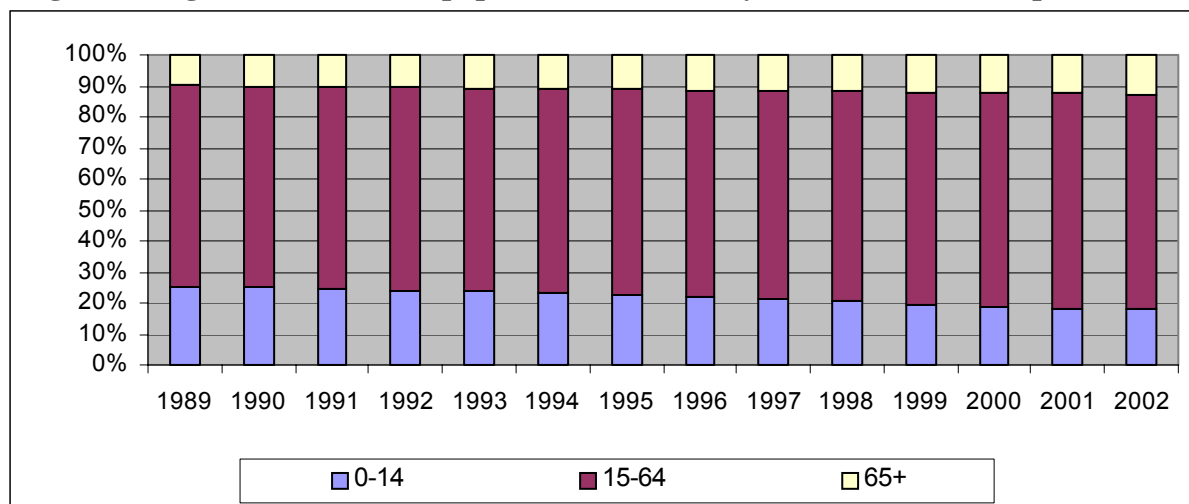
The macro-economic conditions have been reflected in Polish enterprises' situation. In the end of 2002 there were 3,4 million enterprises registered. However in total number of enterprises, the small and medium-sized enterprises decidedly prevail. In 2001 they accounted for 99% of all enterprises, and their number increased, as compared with 1990, by more than 330%. In 2001 these enterprises employed 67,1% of total employment in the national economy, generating 48,3% of GDP. In the European Union countries, with a little higher rate of employment, SMEs produce almost two thirds of GDP. A relatively small share of SMEs in the value of economic activity is related to the dominance of micro-enterprises in their structure, where the quality of human resources and related labour productivity is low.

2.1.2 Demography

Demographic processes, beside economic ones, are an important element in the development of the labour market situation. In Poland significant changes in age structure of the population may be observed. In 2002 the number of working age population (15-64) was by 6 % higher than in 1991. It means that in a period 1991-2002 this population increased more than total population.

Particularly high increase was noted in working age groups of immobility (above 44 years). It was around 90% of total increase in working age population, which was connected with moving wave of post-war demographic boom. As a natural consequence of post-war demographic boom, a demographic boom was also observed on the turn of 1970s and 1980s. Persons born in this period presently reach working age, in turn contributing to the growing share of working age population. In effect of these phenomena, a number of persons between 15 and 24 increased after 1991 by 18%. Increase in working age population was accompanied by systematic drop in the number of pre-working age population (the number of persons in the age group 0-14 dropped by 26% in 2001 as compared with 1991) and increase in the share of post-working age population (the number of persons in the age group 65+ increased by 21%).

Diagram 1. Age structure of the population within the years 1989 - 2001 (in percent)

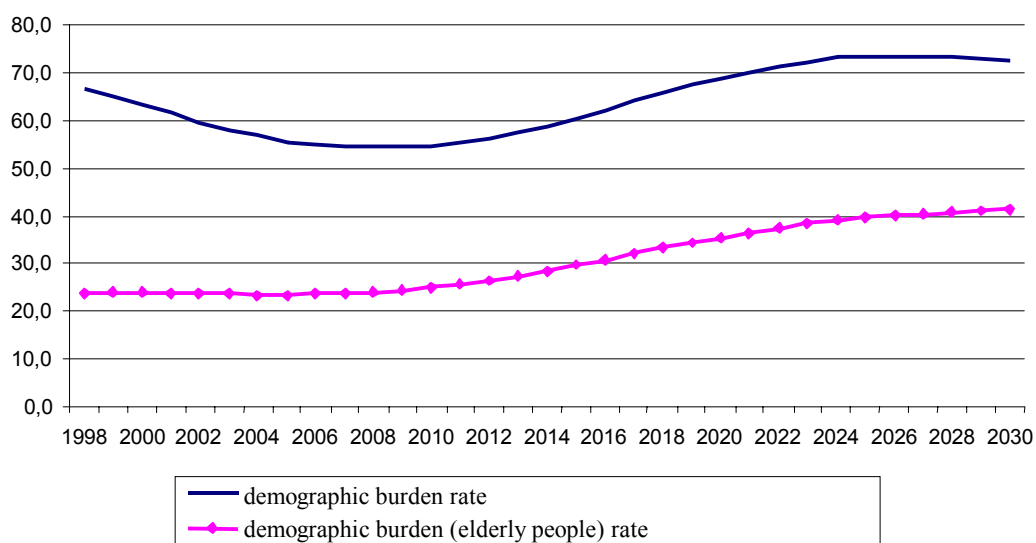


Source: Central Statistical Office, LFS

The impact of demographic changes on the social situation is well presented by a demographic burden rate, that is the ratio of the number of pre-working age population (0-15) and post-working age population (65+) to the number of working age population (15 - 64), expressed in percentage. Demographic changes taking place over the 1990s resulted in a dropping level of demographic burden rate (from 54% in 1991 to 44,3% in 2001) and in increase of demographic burden (elderly people) rate (from 15,4% to 18%).

It means that the current situation in Poland is much more advantageous than EU average, where the described indicators have higher values. According to estimates, the share of working age population (15-64) in total population will reach its maximum value between 2004 and 2006, a bit earlier than in EU countries (2010). The forecasted drop in the share of working age population (from more than 68% in 2010 to a bit more than 60% in 2030) will result in growth of demographic burden rate. This fact, when combined with the extending average life expectancy (in 2001 in Poland – 78.38 for women and 70.21 for men, for EU countries respectively – 81.4 and 75.3) and low birth rate, will contribute to considerable growth of demographic burden rate (elderly people). Both indicators will grow particularly rapidly in the second decade of 21st century, when their values will be higher than present EU average.

Diagram 2. Demographic burden rate and demographic burden (elderly people) rate within the years 2000-2030 (in percent).



Source: Central Statistical Office

Demographic changes may strongly affect the economic situation of the country. If economic activity rate is maintained at its level from the year 2001, one may expect a considerable decrease in economically active population after 2010, which may result in manpower deficit. At the same time, a number of social insurance beneficiaries will increase. An unfavourable ratio of persons employed to recipients of social insurance benefits will bring about serious pressures in the social security system and growth of labour costs, which will additionally contribute to dropping labour demand.

Speaking of the age structure of the population, one should mind the differences between the demographic features of the country and the town. There is a higher ratio of people of pre-working (29,7% against 27,0%) and of post-working age (15,4% against 12,8%) in the country than in the town. Thus the ratio of the working age population (54,9% against 60,2%) is lower. It was estimated that between 1999-2005 the number of rural inhabitants in productive age will be annually increasing by 100,000 persons and between 2006-2010 by over 50,000 persons. Another characteristic demographic feature of the country is more or less equal number of men and women. It means that about 1 million surplus of women in Poland resides in towns.

2.1.3 Labour market

Due to economic changes, initiated at the turn of 1980s and 1990s the labour market in Poland has undergone significant transformation. Work is no longer the right guaranteed by the Constitution and has become a deficit good. Open unemployment in Poland emerged in 1990 and has diametrically transformed the character of the labour market. In the earlier period the problem of manpower deficit existed, with high hidden unemployment, and after 1990 the relative surplus of manpower and quickly growing unemployment rate were noted.

2.1.3.1 Employment

Within the period of 1990s and in the beginning of the present decade the number of economically active persons was subject only to slight fluctuations, nevertheless showing the slightly dropping trend. Between 1992 and 2002 the number of economically active persons decreased by 1.3%. And the number of economically active women decreased more than in

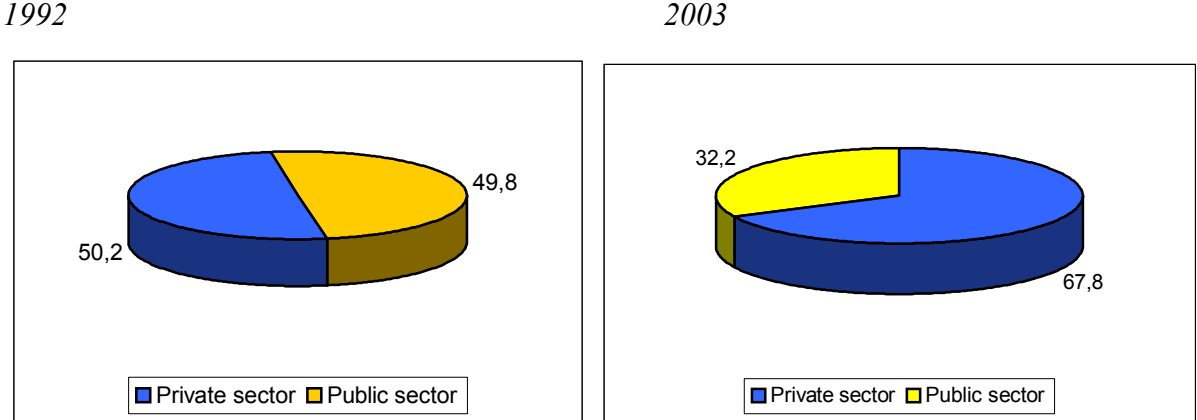
the case of men (respectively 1.5% and 1.1%). In the same period, as it was mentioned earlier, a number of working-age population increased. In effect the participation rate for persons aged 15 – 24 years dropped from 70% in 1992 to 65.4% in 2002.

The number of persons employed was subject to bigger fluctuation. These changes were strongly correlated with changes in the rate of economic development. Profound economic crisis in the beginning of the 1990s resulted in employment decrease. Between 1989¹ and 1994 employment dropped by 13.4%. The subsequent years brought about the acceleration in GDP growth dynamics, which resulted in employment growth. Till 1998 certain increase in employment was observed (by 4.7% between 1994 and 1998). However, within the subsequent years, after the deterioration of economic situation due to the Russian crisis, employment started to further drop. This trend is still maintained. Generally, between 1989 and 2002 employment dropped by 19%. And in relation to 1992, that is the first year of Labour Force Survey in Poland, employment dropped by 9.3%. In effect of these changes and in result of increase in the number of working-age population, the employment rate of persons aged 15-64 years dropped from 59.9% to 51.7% in 2002. In the case of women the decrease was lower (from 53.1% to 46.7%) than in the case of men (from 66.9% to 57%). In 1998, that is in the year of the highest employment level,, this rate was 59.2%.

The Polish labour market reacts to changes in macroeconomic situation of the country in manner indicating big structural problems. Within the period of high economic growth slight improvement in employment situation is noted, while in a situation of lower economic growth rate employment significantly drops. In 1994-1998 the GDP growth by 1% resulted in employment growth by about 0.2%. Among factors causing a limited employment growth a special role was played by labour productivity growth reserves. However, it may be expected that this feature of the Polish labour market, characteristic of economies in transition, will play the declining role.

Employment structure by ownership sectors is one of the most important features allowing to assess the labour market changes. The following diagrams present changes in employment structure by ownership sectors, that occurred within the recent 11 years period in result of economic restructuring.

Diagram 3. Employment structure by ownership sectors (in%)



Source: LFS, Central Statistical Office

The data show the growing domination of private sector employees (increase from 50.2% in 1992 to 67,8% in 2003). Such employment structure, with the dominating private sector, is

¹ Employment in 1989, calculated on a basis of national statistics not based on LFS methodology.

similar to structures of economies in the developed countries, characteristic of most of the EU states.

However the most important changes concern the structure of employees according to various sectors of the economy, as presented in table below:

Table 2. Structure of employees according to sectors, 1994-2002

Year*	Number of employed (in thousands.)				Percentage change**			Share in total employment (in %)		
	Agriculture	Industry	Services	Total	Agriculture	Industry	Services	Agriculture	Industry	Services
1994	3 378	4 709	6 616	14 703	-	-	-	23,0	32,0	45,0
1995	3 238	4 777	6 735	14 750	-4,1	1,4	1,8	22,0	32,4	45,7
1996	3 204	4 846	7 032	15 082	-1,1	1,4	4,4	21,2	32,1	46,6
1997	3 030	4 926	7 308	15 264	-5,4	1,7	3,9	19,9	32,3	47,9
1998	2 784	4 918	7 619	15 321	-8,1	-0,2	4,3	18,2	32,1	49,7
1999	2 763	4 697	7 461	14 921	-0,8	-4,5	-2,1	18,5	31,5	50,0
2000	2 742	4 476	7 303	14 521	-0,8	-4,7	-2,1	18,9	30,8	50,3
2001	2 673	4 204	7 146	14 023	-2,5	-6,1	-2,1	19,1	30,0	51,0
2002	2 542	3 910	7 270	13 722	-4,9	-7,0	-1,7	18,5	28,5	53,0
2003	2 537	3 921	7 270	13 718	-0,2	0,3	-0,1	18,5	28,6	53,0

* all data concern the IVth quarter of each year

** as compared with previous year

Source: LFS

During the last few years the positive trend was observed, with the number of employed in the services increasing among the total number of employed, while the numbers of employees in industry and agriculture were decreasing. However the rate of these changes is seen as too slow².

Of special concern is the stable percentage of the employed working in the agricultural sector. Nevertheless an analysis of the data regarding the sectoral distribution of employment allows for a more optimistic evaluation of changes on the labour market. The observed drop in employment in comparison to the employment level in 1994 concerns mainly agriculture and industry, while the services sector created the majority of new jobs. Unfortunately, during the last few years a drop in the number of employees was observed in all sectors of economy. In the IV quarter of 2002 the drop was observed in agriculture (-0,2%) and services (-0,1%). Detailed analysis of changes in employment in services sector indicate that it is not homogenous as regards ongoing processes onto the labour market but it is feasible to distinguish branches, where the rate of employment is rising, and those where the number of employed decreases. The first group include: real estate and services aimed at companies, continuous education, hotels and restaurants. All other branches faced decrease in employment. Among the hardest hit were financial agencies and educational sector that is branches of economy requiring high professional skills.

² In the EU member countries in 2001 the services sector accounted for 69.4% of all employed (compared to 51% in Poland), industry –accounted for 26.4% (30% in Poland), and agriculture – 4.2% (19% in Poland).

As for the share of the employers and self-employed/own-account workers, it is relatively high in Poland in comparison with the EU countries. In the fourth quarter of 2001 it was 23% in relation to 14,8% for the EU. This advantageous situation of Poland in comparison with other countries, however, is paradoxically a result of a feature of the Polish economy that is considered one of its most serious threats – a high percentage of people working in agriculture.

As much as 69,5% of the people working in agriculture worked as employer or self-employed/own-account worker. If we overlook employers, 68% of the people working in agriculture were self-employed/own-account workers. So large share of this category of working people follows from a high number of small farms in Poland and the prevalence of individual farms as a primary form of agricultural production. One should also add that 23% of the people working in agriculture were the contributing family members. In sum, the total of 91% of the people working in agriculture worked in individual farms.

If we exclude from our analysis the people working in agriculture, the share of employers and self-employed/own-account workers in the fourth quarter of 2001 was 12,3%, and of the self-employed/own-account workers - 7,8%. It proves that an average level of entrepreneurship is relatively low in Poland.

The low share in legal employment is to some extent compensated by employment in grey sphere. The Central Statistical Office tried to estimate with greater precision the grey sphere employment in Poland in a special modular study within the framework of August Labour Force Survey in 1995 and 1998.

The comparison of results of both surveys shows clear relation between the labour market situation and the size of the grey economy. The employment rate in grey economy dropped within this period by 2.8 percentage points (from 7.6% to 4.8%), and the number of persons declaring non-registered work decreased by 768 thous. In the period from January to August 1998 the non-registered work was performed by 1431 thous. persons.

Grey economy traditionally offers the relatively big number of jobs for persons with low vocational qualifications, which is probably connected with low pay. And this factor is an incentive for a part of employers (private companies and households) to risk employment without the formal employment contract. For a part of population with low qualifications the non-registered jobs are the only opportunity to get any gainful employment, being often the only source of maintenance. For most of people employed the non-registered work is an additional job and a supplementary source of incomes. Unfortunately, reliable data illustrating the present level of employment in a grey sphere are not available. However, on a basis of results of the previous two surveys it may be estimated that the level of non-registered employment, due to considerable deterioration of the labour market situation, reduction in household incomes and deteriorating economic condition of enterprises, has significantly increased as compared to 1998.

2.1.3.2 The unemployed

Changes in employment find their reflection in unemployment intensity. Before 1994 the unemployment rate was growing, to reach the level of 16%, and then – together with the improvement of economic situation – it started to drop, reaching 10.5% in 1998. The recent years brought about the rapid increase in intensity of this phenomenon. In 2003 the unemployment rate increased to the level of 19.7%. The unemployment rate of women reached 20,4%, and of men - 19%.

The situation on the Polish labour market is determined by factors which are related to both: a decreasing demand for labour and an increasing supply of work. The most important causes for such a high unemployment rate are:

Macroeconomic factors:

- slower economic growth rate between the years 1999 – 2000 in comparison to the years 1994 – 1997 as well as economic stagnation in 2001, which hindered job creation,
- lower growth rates of jobs, particularly in small and medium enterprises, and a high fluctuation of employees in this sector, resulting in an increased influx of unemployed,
- accelerated process of economic restructuring that resulted in job redundancy in non-efficient sectors of the economy and in enterprises (mainly concerning mining, steel works, defence industry and Polish State Railways),
- introduction of three major social reforms resulting in redundancies in health service, education and public administration,
- expiration of privatisation contracts, which had included clauses prohibiting redundancies and obligations for the employers to stabilise the level of employment in the company.

Demographic factors:

- increased number of persons in the productive age (women between 18-59 and men between 18-65 years of age). Since 1990 the size of this group has increased by approximately 1.8 million persons, with a 1.1 million increase in the second half of the 1990's,
- particularly high increase in the number of persons in productive, but not mobile age bracket (at the age of 44 and above), which accounted for 90% of the total increase of the number of persons in the productive age. In the 90's the proportion of persons in the productive age to the total population increased by 3.7% and at the end of 2002 reached 61.8%,
- further growth of the number of persons at the retirement age (men at the age of 65 and above, women at the age 60 and above). According to the estimations provided by Central Statistical Office, at the end of 2002 the proportion of persons in this age category to the total population was approximately 15.0% (at the end of 1990 – 12.8%). The proportion of persons at the age of 65 and above (men and women) to the total population oscillated around 12.5% at the end of 2002 in comparison to 10.2 % at the end of 1990,
- these demographic trends are reflected in the age structure of Polish society. At the present moment for each 100 persons in the productive age there are 62 persons in the non-productive age, i.e. 24 persons at the retirement age and 38 adolescents, under the age of 17 (in 1990 there were 74 persons – respectively 22 and 52). This results in increasing expenditures for social insurance benefits and the increase of non-wage labour costs.

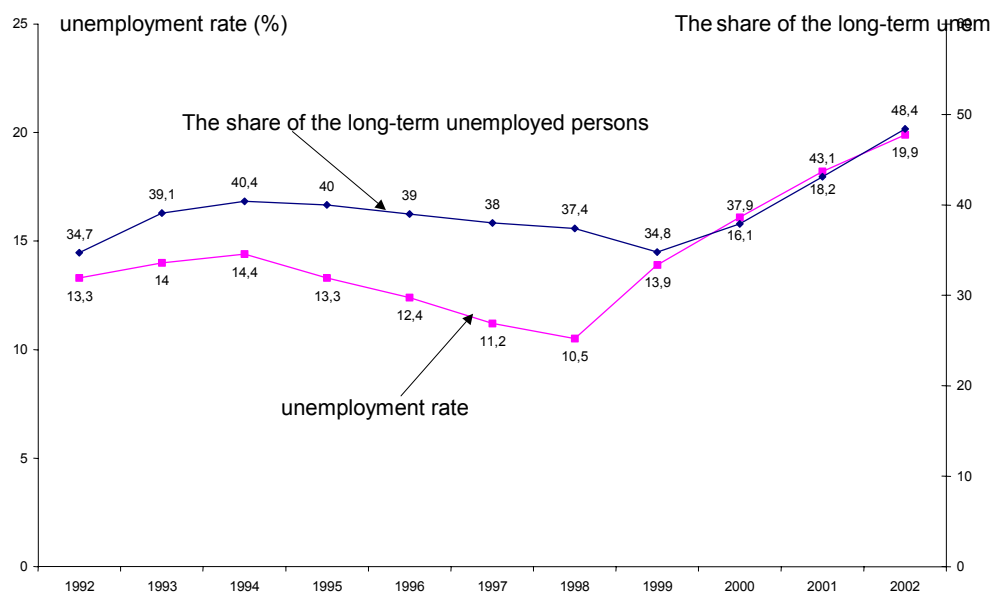
Administrative factors, mainly the appearance of persons interested in health care contributions covered by the state on the basis of having the status of unemployed persons — in many cases these are persons employed in the “grey zone” of the economy.

2.1.3.3 The long term unemployed

The characteristic feature of the Polish unemployment is the relatively high share of the long-term unemployed persons, which is strongly correlated with the unemployment rate. The

rapid increase in unemployment was accompanied by a relatively fast growth in the number of the long-term unemployed persons.

Diagram 4. Unemployment rate and the share of the long-term unemployed persons in the total number of unemployed.



Source: Central Statistical Office, Eurostat

The increasing share of the long-term unemployed persons also entails the growth of the unemployment rate, which between 1998 and 2002 increased from 4.7% to 9.2% (in the case of women: from 6.1% to 10.8, and in the case of men – from 3.5% to 7.8%).

The long-term character of unemployment does also mean that a large number of people lose their right to benefit. In 2003, the number of the unemployed entitled to benefit amounted only to 13,7% of the total number of the registered unemployed. In 2003 the number of the unemployed without the right to benefit increased by 1% as compared to 2002, and the unemployment rate decreased by 1%. The increasing scale of long-term unemployment and the growing number of the unemployed without the right to benefit bear witness to intensification of the structural unemployment. Furthermore, the risk is growing that the unemployed might fall subject to social exclusion in the future.

Aside from the long-term unemployment, there is also a significant problem of recurrence to unemployment. According to statistical data of registered unemployment in the first quarter of 2003, 73% of the unemployed registering with the labour office are people registered again. Unemployment forms thus a constant factor of the life of some part of the population.

The 90s have also brought an increase in the number of vocationally inactive people. Since November 1992 to the fourth quarter of 2001, the number of vocationally inactive people aged 15 and more had grew by 29%. The number of men in this category (37,1%) had been increasing more quickly than the number of women (24,2%).

The labour market programmes are based mainly on the provisions of *the law of 14 December 1994 on employment and counteracting unemployment* (unified text, Dz. U. /Journal of Laws/ of 2003 No 58, Text. 514). The law specifies the tasks of the state in the area of alleviating the outcomes of unemployment, employment and vocational integration of the unemployed as well as other persons searching employment.

The law on employment and counteracting unemployment specifies the following forms of counteracting unemployment, which are regarded as active forms:

1) Job placement, job clubs and job counselling.

These activities are financed by individual labour offices. The main objective is to support the unemployed or those searching for a job in identifying the most appropriate job and taking actions for finding employment.

During 2001 796 “job clubs” operated, organised by poviats labour offices and co-operating organisations and institutions (82.5% of the clubs operated within the labour offices). Among the total of 51 thousand participants, 95.1% were unemployed. At the end of 2001 there were 537 clubs, with 21.8 thousand participants, of which 21 thousand (96.2%) were unemployed. This came to 0.7% of the total number of unemployed at the end of December 2001.

2) Initiating and organising training for the unemployed persons and for persons threatened by redundancy

Poviat Labour Office initiates training for the unemployed in cases of absence of vocational skills, necessity to re-qualify in view of the absence of appropriate employment proposals, loss of ability to perform work in a previously performed occupation. Training should not last longer than 6 months, or in justified cases not longer than 12 months. The cost of training will not exceed two average wages and it should facilitate future employment.

Unemployed person referred to training receives supplement at the monthly rate of 20 per cent of the unemployment benefit. In order to enable an unemployed to take up employment requiring special qualifications, the labour office may grant him/her a loan to cover costs of training up to the amount of four average wages. This loan should be paid back within 18 months after the completion of training.

These actions may also involved employed people. The employers are obliged by the Labour Code and other regulations³ to facilitate their employees enhancement of professional qualifications. Employees sent by employers to school or to training are entitled to paid vacation and shorter hours, and in the case of training the employer is responsible for covering the cost of participation, travel costs and accommodation expenditures. Additionally, the employer may provide voluntary supplementary benefits, which depending on the form of training may include: additional paid leave, unpaid leave, shorter hours of work, coverage of education expenses, travel costs, accommodation and books.

An employer who employs at least 20 employees can receive from the poviat labour office a reimbursement of up to 50% of the costs of staff training, but not more than the value of an average monthly wage per participant. This is conditional on the participants being employed after the training in a job related to the training for a period of at least 12 months.

Financial incentives to invest in continuing education, including in-company trainings, are provided by appropriate tax regulations⁴, which give physical persons the possibility for obtaining tax breaks (19% of tax returns) due to the purchase of equipment and academic aids directly related to work, paid training and professional skill enhancement and education in higher educational institutions. Additionally:

³ *Labour Code* (1996 with amendments) and regulation of Minister of National Education and Minister of Labour and Social Policy *on the principles and conditions for upgrading vocational qualifications and general adult education* (1993).

⁴ Acts on *personal income tax* (1991), *VAT and excise tax* (1993) and on *corporate income tax* (1992) with later amendments.

- allowing legal persons to deduct from their taxed income the amount of donations to other legal persons for academic, technical and academic as well as educational purposes,
- exempting physical persons from paying income tax for stipends and benefits granted by the employer for enhancing professional qualifications and general education level to their employees,
- ensuring so-called „student loophole” for physical persons employing employees to teach them the job,
- exempting from VAT income from personally conducted educational activity,
- exempting from tax legal persons, whose statutory activity is of academic/educational nature.

Regulations, supporting restructuring of sectors and regions⁵, create the possibility for implementing (and co-financing) projects regarding continuing education. Projects regarding enhancement of qualifications of employees are supported through reimbursement of up to 25% costs of special trainings and up to 50% of costs of general training (additionally supported are training in small enterprises and in the regions where GDP per capital is lower than 75% of GDP in EU countries).

Furthermore it is possible to provide:

- free training of unemployed in rural areas, small towns and of farmers, as well as provision of stipends and reimbursement of travel costs,
- payment of educational donations (also for post-graduate studies) for the owners of small enterprises, their representatives or managers,
- payments of budget donations for restructuring of the employment in mining in particular for financing free training.

3) Loans from the Labour Fund

Poviat Labour Office may grant loans from the Labour Fund:

- to employers for organisation of additional workplaces for the unemployed referred to these workplaces,
- to the unemployed (or workers at notice periods dismissed from work for employer-related reasons); the loans are provided for non-agricultural or agricultural activities. The size of the loan should not be higher than twenty times the average wage; as concerns the loan for additional workplaces organisation this rate refers to the creation of one workplace.

The loan repayments may be cancelled up to the rate of 50 % subject to condition of continuing started economic activity for at least 24 months and meeting other requirements specified in the loan agreement.

4) Employment subsidies:

An employer, who has employed the unemployed within the framework of subsidised work - for the period of up to 6 months, may be reimbursed a part of expenditures on remuneration,

⁵ Act on principles of supporting regional development (2000) and regulation of the Council of Ministers on conditions and supervisions of state aids for enterprises (2000), regulation of the Council of Ministers on principles, conditions and procedures for supporting programmes initiated by voivodship self-governments with national budget resources (2000), act on the establishment of the Polish Agency for Enterprise Development (2000), decree of Minister of Economy on grant aiding conditions and procedures of the Polish Agency for Enterprise Development; act on the adjustment of coal mining to the market economy (1998) and decree of the Minister of Economy on grants for financing the restructuring of employment (2001).

bonuses and social insurance contributions of the referred unemployed at a previously agreed rate, however not exceeding the amount of unemployment benefits and social insurance contributions. If the employer, directly after the termination of subsidised work lasting at least 6 months, employed the referred unemployed for the further 6-month period, concluding after this period an employment contract for the indefinite period on a full time basis, the Poviats Labour Office may refund him a one-off cash equivalent of remuneration at the previously agreed rate, however not exceeding 150 % of the average salary.

5) Public works

The Head of Poviats (*Starosta*) reimburses to a public works organiser, who employed the referred unemployed for a period of up to 6 months, a part of the costs of remuneration, bonuses and social insurance contributions of the referred unemployed at the previously agreed rate, however not exceeding the amount determined as a product of a number of people employed in a month calculated as for the full working time and 75 % of the average pay effective on the last day of employment in every calculated month and a social insurance contribution on refunded remuneration.

At the request of a public work organiser, in poviats (gminas) threatened with particularly high structural unemployment, the Head of Poviats (*Starosta*) may agree for the refunding of up to 50 % of input costs of public works organisation, however at the rate not exceeding 25 % of the amount of remuneration and social insurance contributions of the unemployed, financed from the Labour Fund.

6) Support for regional and local labour markets

The Council of Ministers, taking into account the unemployment rate and its envisaged growth as principal criteria, determines in the form of a Decree, the poviats (gminas) threatened with particularly high structural unemployment in which special economic and financial instruments and other preferential instruments may be applied in order to limit unemployment and its effects. The amount of subsidies to co-finance investments in infrastructure that are implemented as the poviats (gminas) own tasks under public works regimes are determined in the Act on the National Budget.

When analysing the effectiveness of active labour market measures financed from the Labour Fund between the years 1999-2002⁶ it should be stated that the highest efficiency was observed in: subsidised jobs (about 65-70%), special programmes in which employment efficiency grew 25.2% in 1999, to 70% in 2001, as well as training (about 45%). The measures with the lowest employment efficiency included public works (13.2% in 1999, 14.2% in 2000, 13.3% in 2001, and 17.9% in 2002). Detailed information on the effectiveness of the programmes is provided in annexe 5.

2.1.4 Qualifications and skills

During the last decades Poland has made significant progress in increasing the level of education of the population. The number of persons with no more than primary education has decreased, while the number of that secondary and high education has increased. In 1970 half of the inhabitants of Poland had only primary or lower education, in 2002 this was the case for 31% of the population. In the same period the percentage of persons with higher education grew from 2% to 10.2%.

⁶ Seen as percentage share of the number of persons who participated in a given scheme and found permanent employment within 3 months after its completion to the total number of persons participating in the scheme.

The increase in the level of education took different forms for women and men. Men obtained their education mainly through vocational training and technical education, while women through general secondary school education. As a result, 57% of working women have graduated from at least general secondary schools, while 43% of the male workforce has only basic vocational school education. Positive changes in education of the population are illustrated in table 4 below presenting a rate of school attendance:

Table 3. Gross rate of school attendance*

Specification	Age groups	1998/1999	1999/2000	2000/2001
Primary schools	between 7 and 14	99.9	100.1***	100.4****
Upper secondary schools **	between 15 and 18	64.5	67.2	70.1
Basic vocational schools	between 15 and 18	23.4	21.8	20.0
Universities/colleges	between 19 and 24	33.5	36.9	40.7

* gross rate of school attendance was determined as a proportion of children and youth attending school at given level of education to total number of persons in this age group. Data regarding primary schools and secondary schools does not include data regarding adult education.

** general upper secondary schools and technical upper secondary schools

*** including students of the first year of lower secondary schools

**** including students of the first and second years of lower secondary school

Source: Central Statistical Office

The methodology of rate of school attendance has changed because the reform of educational system has changed the schools structure.

Table 4. Gross rate of school attendance

Specification	Age groups	2001/2002
Primary schools	between 7 and 12	100.6
Secondary schools	between 16 and 18	
- general		42.4
- vocational		48.2
Basic vocational schools	between 16 and 17	27.1
Universities/colleges	between 19 and 24	43.6

Source: Central Statistical Office

In effect of increasing universality in education, in particular at the higher level, the general education level of the population has increased. In 2001, as compared to 1999, an increase in a number of persons with higher education was observed (expressed as a share in population aged 25-64 years):

Table 5. Percentage of persons in individual age groups with higher education

	1988*	1995*	1999	2001
25-64 years	8,8%	9,4%	11%	12%
25-34 years	8,9%	9,3%	12%	15%
35-44 years	10,6%	9,7%	10%	11%
45-54 years	9,1%	10,5%	11%	11%
55-65 years	5,9%	7,9%	10%	10%

*Data: Education at a Glance OECD Indicators, 2001. 2002, * Central Statistical Office*

In 2002, the drop-out rate of youth aged 18-24 years was 7.6%. It is a very positive result as compared with EU countries, where in a similar period it was 18.8% (*Lisbon Strategy* provides for reduction in the drop-out rate to 10%). However, the level of drop-out rate in Poland may increase in the future due to the changes in the post-primary structure of education. General secondary schools will replace vocational schools, which may discourage some teenagers from participation in further education.

Table 6. Drop-out rate for youth (18-24 years)

	2001			2002		
	Total	Men	Women	Total	Men	Women
EU-15	19.4 *	21.9 *	16.8 *	18.8	21.4	16.2
Candidate countries	9.4 *	11.1 *	7.6 *	8.4 *	10.0 *	6.9 *
Poland	7.9	9.7	6.0	7.6	9.5	5.6

Source: Eurostat

* estimate data

However, formal qualifications, although undoubtedly important, play a secondary role in relation to actual skills. According to *International Adult Literacy Survey (IALS)* results, the quality of human resources in Poland is very low. IALS was a survey carried out on representative samples of adults aged between 16-65, conducted between 1994 and 1998 in 22 countries. The main purpose of the survey was to find out how well adults use information to function in society. The main two conclusions derived from this study are: very high average performance of Sweden and the mean score of Poland much below the OECD average. Besides, in Poland unfavourable distribution of performance is also observed – more than 40% of persons covered by the survey reached the lowest proficiency level (while in other countries performance ranged from 6 to 25%), and the highest proficiency level (4 and 5) was reached in Poland by ca 5%, while in other countries it was between 36% and 9%⁷.

The competitiveness of labour resources in Poland will be also affected by competency level of actual students. As the results of the OECD Programme of International Student Assessment (PISA) show, the performance of Polish students is below the mean for all

⁷ *Adult Literacy: An International Perspective*; National Centre for Education Statistic, Working Paper No. 97-33. U.S. Department of Education; October 1997

surveyed countries (in reading literacy Polish students scored the overall mean performance of 480 as compared to the OECD average of 500).

8.7% of Polish students have not reached even proficiency at level 1 on the PISA scale, which means that – even though they are capable of reading in a technical sense – in practice they are functional illiterates. This percentage is significantly higher than the OECD average (6.2%), although lower than for example in Germany (9.9%) or Portugal (9.6%). Only 5.9% of students in Poland have proficiency at the highest level 5, which means much worse score than OECD average (9.4%). The strongest performance show here New Zealand (18.7%), Finland (18.5%) and Australia (17.6%).

Much better score was awarded to the civil knowledge and involvement of the Polish teenagers within the frames of the research programme under the patronage of the Evaluation of Educational Achievements of the International Education Agency (IEA). The research covered 90 thousand of 14-year-olds of both sexes from 28 countries, and also the teachers of civil education and the headmasters of chosen schools (in Poland it was 179 schools from all over the country).

Among their peers from 28 countries, the Polish students got the best results in the test on the operational knowledge in civil education. Little less, however, although still in the upper levels of the scale, they scored for the ability to interpret social and political events.

The low level of education of Polish nationals is not sufficiently complemented by participation in lifelong learning. According to Eurostat, the percentage of persons aged 25 – 64 who participated in training amounted in 2002 to 4.3%, while an average figure for EU countries was 8.4%. According to estimates, in Poland the employees spend on training in organised forms about 2 hours per year on average, while in the developed countries it is about 50-70 hours per year⁸. In 2002 on average 0.17% of all the unemployed participated in training organised by local (Poviat) labour offices.

A relatively low number of the adults participating in training is a result, despite the existing system of Lifelong learning support, not only of a lack of popularisation among the vocationally active people of this form of improving vocational skills, but of the weakness of the Polish system of Lifelong learning as well.

Measures in the field of Lifelong learning are taken both by the units of public sectors, for example by Lifelong Learning Centres, non-public and non-profit training institutions (acting in forms of associations, foundations, co-operatives), and by the units of private sectors. The network of such institutions, however, is not distributed evenly. In rural areas, where the schooling needs are the greatest, taking into account the level of education and adjustment to the labour market demands, in 1999-2000 training activity was carried out only by 4,1% of all the institutions active in the field of Lifelong learning.

2.1.5 Social exclusion and integration policy

The term “social exclusion” is not defined by the Polish laws and regulations. *The National Strategy of Regional Development* (Resolution of the Council of Ministers, December 2000) defines social exclusion as „remaining in the most difficult situation at the labour market”. *The law on social employment*, dated 13th of June 2003 (Dz.U.122 position 1143), applies in particular to the homeless, alcoholics and drug addicts, mentally disabled, long-term unemployed (+36 months), people leaving penitentiaries and refugees. The law defines a person threatened or affected by social exclusion as a person in particularly difficult living

⁸ Source: *The Strategy of the Development of life-long learning up to 2010*: page 6. Warszawa, June 2003

situation, who is not able to satisfy by himself/herself his/her living needs, with no right to unemployment benefit, pre-retirement allowance or benefit, social pension, disability pension or retirement pension.

Persons threatened by social exclusion therefore include: persons deprived of their independent income, in particular without an entitlement to unemployment benefits, pre-retirement benefits, social pension, structural pension, pension due to inability to work or old age pension. Such a wide approach to the issue of social exclusion is especially valid in the context of the high unemployment currently observed in Poland. National plans for employment, which are prepared by the EU countries, usually present data regarding selected groups, i.e. immigrants, disabled persons or prisoners⁹.

Unemployment can be an important factor leading to exclusion, especially if the unemployment is long-term and without appropriate social assistance. Polish researchers often identify the group of agricultural workers, who lost their jobs at the beginning of 1990's due to the liquidation and bankruptcies of former State Farms as a group, which has undergone the process of social exclusion. Also working class communities living in areas dominated by traditional industries such as mining or steelworks, where the numbers of jobs are shrinking due to structural reforms are identified as socially excluded groups. Research conducted in large cities (for example in Łódź) showed the existence of socially excluded communities: "poverty enclaves" with combined social problems of poverty, unemployment, job passivity, alcohol addiction, low level of education, early parenthood and law breaking.

When analysing social groups particularly threatened by social exclusion, special attention must be devoted to poor persons. Although it should be stressed that low income does not necessarily mean social exclusion, poverty – and particularly poverty combined with unemployment, large numbers of children and/or residence in rural areas – increases the threat of exclusion.

Table 7. Extent of poverty in Poland, 1993-2002

POVERTY LINES ¹⁰	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
	% of persons below the poverty line									
Relative (50% of average monthly expenditures of individual households)	12,0	13,5	12,8	14,0	15,3	15,8	16,5	17,1	17,0	18,4
Defined by the law	-	-	-	-	13,3	12,1	14,4	13,6	15,0	18,5
Minimum subsistence	-	6,4	-	4,3	5,4	5,6	6,9	8,1	9,5	11,1
Subjective (Leyden) ^{a)}	40,0 ^{b)}	33,0 ^{b)}	30,8 ^{b)}	30,5 ^{b)}	30,8 ^{b)}	30,8 ^{b)}	34,8 ^{b)}	34,4 ^{b)}	32,4 ^{b)}	30,4 ^{b)}

a) Data for IV quarter b) Proportion of individual households.

Source: Central Statistical Office, Estimation based on research analysing budgets of individual households.

⁹ The document Guidelines for employment policies for Member States for 2002 (which included the statement on the need to "counteract discrimination and to promote social inclusion through employment") lists only three socially excluded groups: the disabled, ethnic minorities and migrating workers. In the Polish draft Social Policy Strategy (July 2002) socially excluded groups included persons undergoing treatment for alcoholism and drug addiction, the homeless in the process of leaving homelessness, long-term unemployed, and refugees.

¹⁰ Poverty lines have been defined as: 1) relative poverty: 50% of average spending of households, modified by the OECD equivalence scale; 2) poverty as defined by law: figure which allows access to social assistance; 3) minimum subsistence: figure necessary to cover needs, which cannot be displaced in time and which are necessary for survival; 4) subjective: level declared by respondents as "barely adequate" (defined using the Leyden Poverty Line method).

Persons excluded from the labour market due to unemployment are the main group threatened by poverty. In 2001 the rate of extreme poverty among households with at least one unemployed person reached approximately 21%, while among households without unemployed members this rate was lower than 6%. The most difficult situation was observed in families, in which social benefits are the main source of income (rate of extreme poverty – 31%). Low paid jobs also lead to pauperisation. This concerns mostly persons with low level of education, employed as workers. There is clear correlation between low level of education and poverty, regardless of applied assessment methods. Higher education practically eliminates the threat of extreme poverty. Among households where the head of the family had at least secondary school education, the percentage of families living below the minimum subsistence level was approximately 4%, while in the case of persons with basic vocational education degree this percentage was 12%, and among those with, at the most, primary education – 17.5%.

The threat of poverty is also related to the place of residence. Families living in small towns and rural areas are relatively more often affected by poverty. Inhabitants of large urban agglomerations are less often affected. In 2001 extreme poverty was observed among 6% of persons living in urban areas (in 2002 - 7%), and approximately 500,000 of them – 2% lived in big cities. In towns up to 20,000 inhabitants the rate was about 10%. In rural areas extreme poverty assessed as existence at the level of minimum subsistence was observed among 15% of persons (in 2002 17,4%). The most difficult situation was observed among households located in rural area, without own farm and supporting family from employment related sources of income, other than pensions (cf. table 3 in annexe 5).

Families of former workers of State Farms constitute a special group living in rural areas. Some researchers claim that the "state farmer syndrome" includes helplessness, lack of self-reliance, passivity, often excessive drinking. Housing estates of former State Farms are now concentrations of poverty, unemployment, exclusion, also pathological behaviors. In addition to this, a new issue of "hereditary" unemployment has appeared. Children reproduce the pattern of life without work, which is caused by financial limitations, difficult access to schools, and cultural barriers in the form of a strong model of early self-reliance. As a result most children finish their education at the elementary level, which is conducive to a permanent exclusion from the labour market.

The national policy for the persons at risk of social exclusion comprises complex actions aimed at counteracting exclusion both by the social assistance as well as through social employment, envisaged in *the law of 29 November 1990 on social assistance* (unified text: Dz. U. /Journal of Laws/ of 1998, No. 64, Text 414 with further amendments) as well as *the law of 23 April 2003 on social employment*.

The law on social assistance lays down the general principles of the social assistance system in Poland and provides that the social assistance is the social policy institution of the state, aimed at counteracting social exclusion through the assistance to the individuals and families in overcoming and preventing difficult life situations, which they cannot overcome using their own means, abilities and entitlements. At the same time the social assistance should as far as possible assist the individuals who benefit from its services in achieving independence and full integration with their environment.

According to the social assistance law, the social assistance benefits are granted on the basis of the application from the person concerned, her/his legal representative or other person (acting with the consent from the person concerned or her/his legal representative). Moreover, the social assistance may be granted ex officio. The gmina and powiat, are obliged, according to the provisions of the law, to perform the tasks belonging to social assistance, cannot refuse

the assistance to the person in need, in spite of the existing obligation of individuals and legal persons to fulfil his/her indispensable life needs.

The financial benefits granted within the social assistance are: social pension, permanent allowance, complementary permanent allowance, special target allowance, single maternity allowance, temporary maternity allowance, target allowance as well as the addition to the social pension, permanent allowance, complementary allowance. On the part of the financial benefits paid, also the old-age and disability insurance contribution is imposed. Some benefits are of a complementary character and they depend on the income of the individual or the family. In case of some of them such as: social pension, permanent allowance, guaranteed temporary allowance, their amount is guaranteed by the law, they are obligatory and guaranteed by the state after fulfilling the conditions specified by the law. Support under the social assistance also takes the form of services in the place of residence, the so called environmental assistance, or the form of in-patient assistance (in social assistance in-patient centres, care and rearing centres, support centres).

The entitlement to social assistance benefits is exercised by persons who are in hold of Polish citizenship and reside and stay on the territory of the Republic of Poland, as well as by foreigners who reside and stay on the territory of the Republic of Poland and are in possession of the permanent residence permit or the refugee status.

The social assistance benefits are granted in particular for the following reasons: poverty, loss of parents, homelessness, the need to protect the mother or multichildren families, unemployment, disability, long-term illness, inability to fulfil the care taking and household responsibilities, in particular in case of single-parent families or families with numerous children, alcohol- and drug-addiction, difficulties in social integration after leaving the correction institution, natural or ecological disaster.

Social assistance belongs to the competence of governmental and self-governmental administration bodies, which co-operate with social organisations, Catholic Church, other Churches, religious associations, foundations, associations, employers, as well as individuals and legal persons. The following are organisational units of social assistance:

- at the gmina level – social assistance centres,
- at the poviat level – poviat centres of family assistance,
- at the voivodship level – regional social assistance centres.

Presently works are carried out to draft the new law on social assistance, whose regulations should contribute to mobilisation of recipients of social assistance benefits, providing assistance in becoming independent, return to the labour market. As concerns working age persons who are able to work, granting of benefit will depend on the conclusion of a social contract, defining rights and obligations of parties in the process of going out of a group of social assistance beneficiaries. The changes in the social assistance system are among others connected with adoption of *the law on social employment*. The underlying principles of *the draft law on social assistance* emphasise the necessity of larger co-operation between social assistance services and employment services.

The law on social employment, mentioned before, places a special emphasis on self-reliance of the socially excluded persons through the economic independence as well as through learning how to fulfil the living needs independently. The law establishes the institutional mechanisms enabling employment, thus resulting in vocational and social re-integration. According to the law, the social employment entails:

- participation in social incubators – Social Integration Centres (organisationally and financially independent territorial self-government units, Voluntary Labour Corps and the organisations of social profit, the statutory task of which is vocational and social re-integration of the socially excluded persons),
- supporting social employment among the entrepreneurs or within the economic activity in the form of a co-operative, as the transfer from the period of participation into full vocational integration.

It is estimated that in the first year of functioning of the law, about 800 persons socially excluded on a permanent basis will be mobilised. It is the target to create ca 150 Social Inclusion Centres, which will allow for mobilisation of 4 to 7 thous. persons annually – a half of them finding permanent job. The estimates may improve thanks to the European Social Fund.

2.1.6 Social economy

Social economy is a new concept, both in the language of social analyses and in political practice. Thus, it is understood in a different way. Non-governmental organisations are the topic closely connected with the social economy. They are defined as entities independent of public administration, which most often have the form of associations or foundations and affiliate both individuals and other organisations. Other equivalent terms are also in use, such as:

- **non-profit organisations**, because they do not function for profit,
- **voluntary organisations**, because they mostly base on the work of volunteers,
- **social organisations**, because the sphere of their interest most often covers activities for public welfare, such as widely perceived social assistance, health care and education,
- **third sector**, defining all non-governmental organisations; it may be derived from a tradition of division of socio-economic activity into three sectors: public administration also called public sector; private sector (all profit institutions and organisations); and the third sector (all private organisations, based on social activities and non-profit).

The results of a survey of non-governmental organisations in Poland, conducted by the Association KLON/JAWOR in 2002 show that more than 36 500 associations and more than 5 000 foundations are registered in Poland. At least 58% of them are very active. These are young organisations: 91% have been created after 1989 and 30% have been functioning for less than 3 years now. Most of associations and foundations mention, as one of three most important activities: sports (59.3%), education (48.2%), health care, rehabilitation and assistance for persons with disabilities (32.6%) as well as culture and arts (27.4%). 53% of organisations do not employ paid personnel, implementing their objectives thanks to voluntary work, while 33% of organisations employ 1-5 people.

65% of non-governmental organisations mention, as their basic form of activity, direct services for members, persons under charge or clients of a given organisation. Other mentioned forms of activity include: co-operation with other organisations or institutions in Poland (41%) and mobilisation and education of the public to support activities of the organisation, public campaigns, etc. (39%). International co-operation with institutions and organisations of similar objectives is mentioned by 16% of organisations, and financial support for projects implemented by other organisations and institutions in Poland - 5%.

Financial resources of all associations and foundations include mainly means from public sources: self-governmental (19.6% of total income in this sector), governmental (13.5%), donations from individuals and from companies (16.5%) as well as incomes from business

(10.4%). Financial means coming from foreign assistance programmes, inter alia from the European Union, amounted to 5.7% of total incomes in this sector. At the same time, 65.9% of organisations announced a need for training in the field of fund-raising, which proves that expectations in this area are very large.

Territorial distribution of organisations is unequal and ranges from 14.2% in Mazowieckie voivodship (per 10 thous. inhabitants) to 7.6% in Opolskie voivodship, which means that 49% of registered organisations have their head offices in large towns.

About 40% of organisations cover by their activities an area of gmina or powiat, for 23% of them voivodship is an area of activity and for almost 25% - it is the whole country. In the case of co-operation with the institutions from neighbourhood – from gmina or powiat – most often (in 80%) self-government is mentioned.

In the end of 2000, the number of people working in foundations, associations, social organisations, employers' organisations, and occupational and economic self-government amounted to 112 thousand people (69 thousand women). This figure, as compared to the end of 1998, increased by 90%, with the drop in total employment in the same period by 5%. It means that the social sector is one of the most dynamically developing sectors in Poland. Nevertheless, people working in such organisations only accounted for 0,7% of total employment in the end of 2000. In the end of 2000, the number of people working in co-operatives was 442 thousand (2,9% of total employment). Unfortunately, as compared to the end of 1998, the number of people working in co-operatives dropped by around 20%.

In the field of socio-economic policy the significance of entities acknowledged as social enterprises has seriously grown for the last years. This results from the conviction that the development of social economy, and more broadly, of civil society will contribute not only to mitigation of the social effects of economic transformation, but also will allow for construction of fair and open for all society.

Beside the political factors, which affect the attitude of the government towards social enterprises, economic factors are by no means of a trifling significance. For the last years Poland has been in the situation of a crisis in public finance. One of the instruments for limiting the budgetary deficit is to look for more effective and economical methods of execution of the public tasks of the state. This is undoubtedly furthered by entrusting non-governmental organisations with these tasks by way of dissemination of such techniques as contracting or outsourcing.

One of the most important measures taken recently, fitting in the philosophy of social economy, is *the law of 24 April 2003 on public profit activities and on voluntary work* (Journal of Laws of 2003, No. 96, Text 873). The law defines the rules of the co-operation of the bodies of public administration with non-governmental organisations in the field of public tasks, among which there belongs: promotion of employment and vocational activation of the unemployed and those in risk of losing their job, social assistance, activities to support the disabled, activities to support national minorities, popularisation and protection of women's rights, support for equal rights of men and women. The co-operation is based on the principles of subsidiarity, sovereignty of the parties, partnership, effectiveness, fair competition and transparency.

The law grants the organisation of public profit activities¹¹ with particular entitlements, for example to tax relieves and fiscal payment exemptions, acquisition on special terms of the right of usage of a real estate owned by the Treasure or a unit of territorial self-government,

¹¹ Public profit activity is understood as a socially useful activity carried out by non- governmental organisations related to the tasks specified in *the law on public profit activities and voluntary work*

allocation of 1% of the income tax from natural persons for these organisations. Moreover, the law introduced into the Polish legislation the notion of voluntary work, defining the rights and obligations both of a voluntary worker and an organisation using his work.

The law of 23 April 2003 on social employment (Journal of Laws of 2003, No. 122, Item 1143) also comes as an attempt to strengthen the “third sector” in Poland, following activities aimed at vocational and social reintegration of the people socially excluded. Vocational and social reintegration shall be carried out by way of participation in a Social Inclusion Centre, active in the form of a social non-profit enterprise with a special status, entitled to conduct productive, commercial and service activities. The law provides also support for co-operatives, set up after conclusion of the programmes of social and vocational reintegration of their participants.

In Poland social employment constitutes a subject of interest to a number of institutions, including non-governmental organisations, active in the area of vocational and social inclusion of social assistance recipients. It is implemented in a system of co-operatives, the so called work co-operatives. There are two distinct kinds of work co-operatives:

- of a social character – aimed at education, health care, culture; and
- of a services character – creating new workplaces in the field of services, integrating socially excluded people or persons in danger of social exclusion.

As a good example of social employment organisations one might mention among others the projects in favour of the long-term unemployed persons of Barka Foundation and co-operatives for mentally ill persons organised by the Association for the Development of Psychiatry and Environmental Protection.

In addition, the draft of *law on employment promotion and labour market instruments* will introduce to the Polish legal order a new kind of co-operative – the social one- by amendment of the *law on co-operatives*.

The social co-operatives can be established by people threatened or affected by social exclusion (homeless, alcohol and drug addicted, ex-offenders, mentally ill persons, refugees). They will be aimed at conducting common enterprise, on the basis of personal work of their members, in order to facilitate the social and vocational reintegration.

2.2 Labour market analysis from the standpoint of discrimination and inequality

2.2.1 Employability

As it was mentioned above, unemployment is a phenomenon that affects various social groups in very different ways. The features that have a strong influence on the chances in the labour market are: gender, age, education, health, and place of residence. Differences of the position in the labour market, related to the above factors, are often results of a conscious discrimination against some categories of people (as is certainly the case with women, elder people, disabled, foreigners, and ethnic minorities). They are also effects of inequality caused by structural maladjustment, which is certainly the case with such variables as qualification level or the place of residence.

2.2.1.1 Education

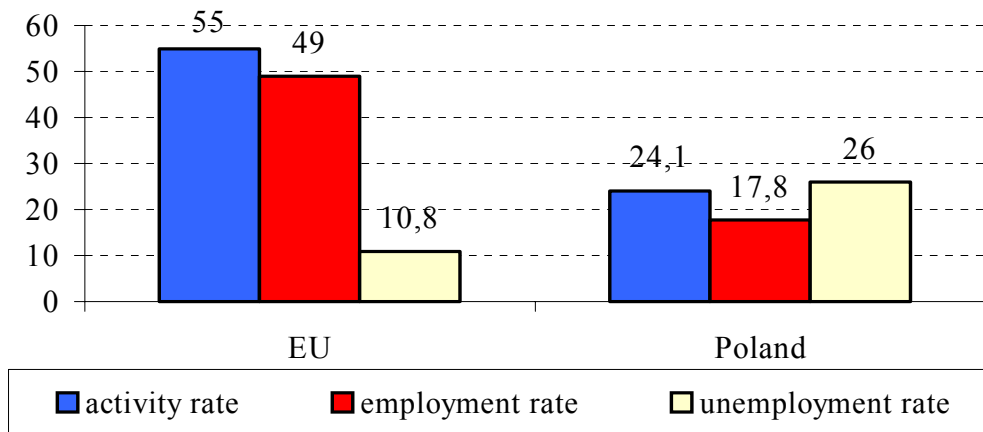
Surveys confirm that persons with lower education and with no vocational experience are mostly threatened by unemployment. In 2002 the unemployment rate was the lowest among the people with higher education (7.3%). And the high unemployment rate was noted among persons with general secondary education - 23.3%, basic vocational education – 24.4% and primary education (complete and incomplete) - 25.6%.

The progress in economic transformation is accompanied by a growing percentage of people with higher education. In 1992 they accounted for about 10% of the total number of the people employed aged 15 and more. In 2001 the percentage reached the level of 16,2% (for women – 19,4%). The labour demand forecasts show that in the forthcoming years the demand for employees with higher education will be still growing, and in 2005 the share of the employees with higher education in relation to the total employment shall amount to 17,4%. Thus **the level of qualifications is becoming more and more important indicator of success in the labour market.**

The economic development and increasing involvement of the Polish economy in international co-operation result in decreasing demand for low qualified manpower. Over the recent years a share of employed persons with lower secondary, (or incomplete primary) education has drastically dropped: in 2002 they accounted only for 13.5% of the total number of employed persons as compared with 25.7% in 1992. In 2002 the employment rate of people with the lowest education, aged 15 and more amounted to 19.1%, as compared with 35.3% in 1992. The employment rate for persons with higher education in 2002 was 74.4%.

The majority of persons with the lowest education level worked in 2002 in agriculture – 55,5%. In manufacturing only 14,5%, and in trade and repair - 5.7%. It means **high concentration of these persons in economic sector, whose economic role is decreasing.** It should not be expected that the demand for persons with such qualifications, notified by other sectors, will increase in the forthcoming years. In effect these persons have very limited opportunities to find employment outside agriculture.

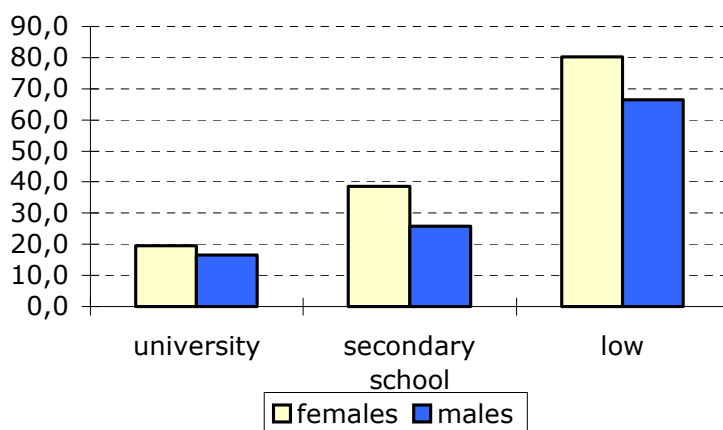
Diagram 5. Comparison of activity rate, employment rate and unemployment rate for persons with low education: EU level in 2001; Poland - the fourth quarter of 2003)



Source: *Employment in Europe 2002. EC Report; Poland Central Statistical Office, LFS*

The level of economic inactivity is also strongly correlated with the education level. People with the lowest education level are the biggest risk to get excluded from the labour market. However, as much as 32% of the vocationally inactive people give education as the reason for not looking for a job, which means that those may be people still learning. But 56% of this population explain their economic inactivity by retirement, disability or sickness. This means that those may be older people which have already withdrawn from the labour market.

Diagram 6. Inactivity rate among persons at the age 15 and above by education and gender in IV quarter of 2001 (in percent)



Source: *Central Statistical Office, LFS*

The growing demand for employees with higher education and the diminishing chances for employment of the people with the lowest level of education mean that equal access to education is of essential importance to increase employability. The education system in Poland does not at the moment promote equalisation of opportunities of the young people coming from the social groups with difficulties in the labour market. Unfortunately, it aggravates them due to segregation present at the time of changing schools (while graduating from primary to lower secondary school or from lower secondary to higher secondary school – vocational or general).

Many forms of inequality in the access to education could not have been eliminated for years, and in the beginning of the 90s they even intensified. The most important factors determining presence of these forms of inequality are:

residence in the country or a small town – young people from villages or small town have a more difficult access to education at all its levels; according to the data on enrolment, residents of big cities stand the best chance to get higher education, social group origin – social advancement is difficult to achieve in Poland. Children usually follow the education track of their parents; over 43% of the children whose fathers have only primary education do not make any further education efforts. Only 5% of them get higher education, as compared to 52% of the children from better educated families, disability – people with disabilities have more difficult access to education than the rest of the population; only 46% of them get special education, and merely 15% of the young disabled Poles aged 15-19 graduate from secondary school of any type, national or ethnic minority origin – although the opportunities for the access to education of national and ethnic minorities have improved in the transformation period, the number of schools for representatives of national minorities in Poland has grown, and in 2001 it was 571 (including inter-school groups/complexes).

Hitherto activities

Thus, equality of access to education is one of the most important directions of the educational policy of the state. The measures in this field are first of all focused on the following groups of students and teachers:

- disabled students (free of charge handbooks, revalidating classes, possibility to prolong education for at least one year at each educational level, and smaller number of students in classes attended by disabled students),
- socially maladjusted youth, threatened with social maladjustment, at risk of addictions or behaviourally disturbed (socio-therapeutical meetings and small number of students in classes attended by students with any dysfunction or behaviourally disturbed),
- students from national minorities or ethnic groups (free of charge handbooks for learning languages of national minorities and ethnic group, under the Pilot governmental programme for Roma community in Małopolskie voivodship in 2001 – 2003, implemented in territorial self-government units of Małopolskie voivodship; schoolbooks and appliances were bought for all Roma pupils and children in kindergartens, compensatory lessons have been organised, rehearsals were held in Polish language and interest circles, schools have been equipped with necessary didactic aids for these lessons, supportive teachers and Roma assistants have been employed, who provide the Roma children and youth with comprehensive assistance, adult training has been organised - this solution will be continued under the Programme for the Roma community in Poland),
- students and teachers from rural areas (for example preparing the teachers from village schools to continue education in teachers' colleges of foreign languages or at philological studies in order to gain qualifications to teach a foreign language under the programme Meeting the demand for qualified teachers in rural areas; removing the barriers related to commuting to the nearest school under the programme Small school, whose aim it to maintain small village schools; granting funds for activities aiming at developing interests and artistic, intellectual and physical abilities of children and youth from rural areas in the form of extra-mural education, scholarships for young people from rural communities who continue education in matriculation schools under the Programme of equalisation of educational chances of young people from rural areas/the rural youth).

There are also programmes focused on improving the educational chances of children from the families in difficult material situation, by way of providing them with school equipment (Equipment to school) or by organising and financing meals in schools (the Governmental Programme for Assisting Gminas in supplementing the diet of children).

2.2.1.2 Age

Research confirms that age is also a feature, which considerably differentiates the labour market situation of individual groups.

Particularly young persons encounter problems in finding a job. The unemployment rate of persons aged 15-24 in 2002 was 43,7% (43,3% for men and 44,2% for women) and was almost two times higher than unemployment rate for the whole population. To compare, the youth unemployment rate in other candidate countries was: in Czech Republic – 15.4 %, and in Hungary - 11.2%.

Among the most important reasons of limited demand for the work of young people, the lack of vocational experience is most often mentioned. Graduates situation is particularly difficult here ¹² In 2002 80,5% of them were economically active, but only 40.7% worked and their unemployment rate was 49,4%.

The economic activity rate in the case of persons aged 15-24 years in 2002 was 35.6%. The relatively low percentage of economically active persons in this age group is caused by continuation of education or up-grading qualifications (90% of them mention such reason). Many young persons, taking into account labour market problems, decide to delay the moment of entering the labour market, devoting this time for up-grading qualifications.

However, age plays also an important role in economic activity in the case of elderly persons. In older age groups (55-64 years) the economic activity rate in 2002 was 31.2% (26,9% for men and 34,8% for women), and the unemployment rate – 10.5%. It is relatively low, which results from the fact that persons from this age group quickly leave the labour market, becoming economically inactive. In 2002 the most frequent reason of withdrawing from the labour market was retirement (48,5% persons aged 55-64 years and 69,1% persons above 65 years), and sickness, disability (respectively 34,6% and 23,2%). Elderly persons (55-64 years) in a situation of unemployment are encouraged to take advantage of earlier retirement pension, disability pensions and pre-pension allowances. The latter are financed from the Labour Fund, which also covers costs of active labour market policies. The share of expenditures on benefits has been systematically growing over the recent three years, restricting available resources for active measures. At the same time, the low effective retirement age in Poland results in growing burden imposed on the social insurance system and increases labour costs. Much worse situation of women as compared to men results among others from the earlier retirement age of women.

Elderly persons in a situation of unemployment are willing to take advantage of an opportunity to leave the labour market, because the probability of finding job is considerably lower than on average – an average time of job-seeking for persons above 55 years, in 2002, was 19,3 months (for women 19,7 months and for men 19,1 months). In 2002 58,1% of these persons were unemployed for 13 months or longer.

However, it should be noted that **also younger persons – above 45 years – are subject to the labour market discrimination.** As the quality studies, carried out by the Institute of Labour and Social Affairs, show - the role of age as a determinant of labour market discrimination is often raised in the case of this age group. Age above 40 years makes finding

¹² Under the law on employment and counteracting unemployment this status is granted for 12 months to a person, who has completed a school above the primary or lower secondary level. The law of 18 September 2001 on facilitating graduates' employment (*Dz.U. /Journal of Laws/ of 2001, No 122, Text. 1325*) supports vocational mobilization of graduates.

job more difficult, at the same time not protecting them against loss of job in spite of the long employment period.

Labour market discrimination on grounds of age is stronger in the case of women than men. The border age of women's employability is a bit lower than for men (35-40 years as compared with 45 years), although at the same time the retirement age of women is lower.

The long-term unemployment is a feature strongly correlated with the age of an unemployed person. According to data from labour force survey in 2002 the long-term unemployed persons accounted for 39% of a total number of unemployed persons aged 15 – 24 years and 58,1% unemployed persons aged 55-74 years. As far as registered unemployment is concerned the share of the long-term unemployed persons in a total number of unemployed persons aged 18 – 24 years, as of the end of 2002, was 38.2%, while in the case of persons aged 55 – 64 years - 68%.

Hitherto activities

The law on employment and counteracting unemployment creates a framework for **professional mobilisation of school leavers**. A school graduate referred to training by a Poviats Labour Office is eligible, during the training period, for a scholarship equalling to 60% of the unemployment benefit. The graduate can also be referred to an employer for on-the-job-training, based on the programme defined in the agreement concluded between labour office and the employer, for a period not exceeding 12 months. A school leaver during on-the-job training is eligible for scholarship equalling to the amount of unemployment benefit.

An unemployed residing in a poviat or gmina registered as threatened with high structural unemployment who within the period of 6 months after the loss of the school graduate status has taken up education in a post-primary school for adults, may be granted by the Poviats Labour Office, upon his/her application, a scholarship amounting up to 60% of the unemployment benefit for a period of 12 months provided that he/she continues education.

A Head of Poviats (*Starosta*) may reimburse, during the period of 12 months, expenditures related to the full-time employment of a graduate referred to an employer and borne by the employer, for the remuneration and social insurance contributions in the amount not exceeding the amount of the unemployment benefit.

In answer to difficult labour market situation of graduates, the programme of vocational mobilisation of graduates – First Job, has been implemented since 2002. It is a part of the Socio- Economic Strategy of the Government *Entrepreneurship-Development-Labour* and is aimed at counteracting unemployment of graduates and mobilisation of all registered graduates within a period of first 6 months after registration. The Programme includes measures in four thematic areas: promoting employment of graduates in SME sector, stimulating self-employment, motivation for further education, facilitating the acquisition of vocational experience through the development of voluntary work, services of vocational information and guidance.

In July 2002 the number of job offers for school graduates was three times larger than a year before. This was a result of the overall growth in the number of job offers (36% increase as compared to the previous year), and of the implementation of the *Programme of vocational activation for graduates – First Job* started in 2002.

One of the means to help the unemployed people above 50 is the Program 50+. Its aim is above all to change the employers' policy towards 50-years-old workers and also to start a new, active policy towards them so as to discourage them from earlier retiring. Furthermore,

their vocational activity will be broadly promoted, especially starting up their own business. The main tools to reach these objectives are:

- labour market projects, leading to creation of the new workplaces for older workers; these are among others: mentoring, job-rotation, community business, self-help firms;
- counselling and projects improving the social communication level, e.g. vocational guidance, including the EURES services, re-training, cooperation with employers;
- financial reimbursement for giving up a passive attitude and taking up a job.

The Program is supposed to start in the beginning of April 2004. Its pilot phase will last till March 2005 and in April 2005 new conditions of its implementation will be announced. Also changes in the system of social transfers, namely excluding since 2007 possibility of early retirement and limited entitlement to pre-retirement benefits and disabled pensions, should increase employment rate for those group.

2.2.1.3 The long-term unemployment

As the analysis carried out by the Institute of Labour and Social Affairs shows, it is difficult to univocally determine factors contributing to discrimination of persons jobless for a period longer than 13 months. This mainly results from the fact that most of trends in this group reflect the character of changes in a general population, that is a general number of unemployed persons. Nevertheless, the character of the long-term unemployment causes that it may contribute to some signs of unemployment in relation to unemployed persons representing this category.

This group shows specific features from the point of view of labour market and economic activity. These features do not allow for treating this group in the same way as other groups of unemployed persons. It is considered that persons seeking job within a period longer than one year lose occupational skills in result of lack of contact with vocational practice, are discouraged from active job search, often have too high pay demand and represent low level of qualifications.

An additional factor that impedes vocational mobilisation of these persons is focus of mobilising measures on persons who are in unemployment registers for a relatively short period of time. In the end of 2002 persons registered as long-term unemployed accounted for 51% of a total number of unemployed persons, at the same time accounting for 31.5% of all persons covered by intervention jobs and 26.6% of persons covered by public works.

Besides, the long-term unemployment concentrates in groups that are more vulnerable on the labour market, as women with low education, elderly persons. Thus we may consider that **the long-term unemployment as a discriminating factor, is correlated with other socio-demographic features, as age, education level or sex.**

Hitherto activities

Polish government applies the so-called **special programmes** addressed to persons, who due to their professional qualifications and situation on the local labour market are threatened by long term unemployment and its effects. This group include unemployed persons, employees during redundancy period due to reasons related to the employer, job seekers receiving social benefits, repatriates, persons receiving guaranteed periodical benefits granted by social assistance.

These programmes, based on a contract concluded between the Head of Poviast (*Starosta*) and employer or person covered by the mobilising measure, may include:

- inspiring employment through reimbursement of partial costs of employment, travel costs to workplace, costs of accommodation, equipment for workplace or training;
- supporting creation of additional jobs through granting low interest loans from the Labour Fund for creation of jobs for referred persons or through reimbursement of partial costs of loan interests granted for job creation;
- supporting persons covered by special program in undertaking economic activity or farming responsibilities through granting loans with lower interest rates from the Labour Fund, partial reimbursement of costs related to payment of loan interests granted for taking up economic activity, partial reimbursement of costs of training, counselling or consultation regarding the activity being taken up;
- professional mobilisation of persons covered by special programs through reimbursing employers partial costs of on-the-job training provided to referred unemployed persons.

The scale of the actions undertaken under special programmes has been presented in the annex 5.

The objective should be to reintroduce the long-term unemployed and those who have lost the right to unemployment benefits back to the labour market. It requires significant financial inputs for organisation of trainings and programs facilitating changes of this passive approach. It is also necessary to provide assistance in finding employment through an introduction of flexible forms of employment in order to limit periods of unemployment.

2.2.1.4 Disability

According to LFS, in the fourth quarter of 2002 a number of persons with disabilities¹³ aged 15 and more was estimated at 4.2 million, that is 13.6% of population in this age group. Economically inactive persons accounted for 82.7% of this group. 14.4% of them remained in employment, of which 52.4% on a full-time basis (similar indicator for able persons was 89.3%).

Table 8. The structure of population of persons without disabilities and persons with disabilities aged 15 years and more in the fourth quarter of 2002

Specification	Persons without disabilities			Persons with disabilities		
	Total	Men	Women	Total	Men	Women
in thous.						
Total	26874	12756	14118	4235	2071	2164
Employed	13111	7131	5980	611	386	225
Unemployed	3253	1693	1559	122	73	49
Economically inactive	10510	3931	6578	3502	1612	1890
in %						
Total	100,0	100,0	100,0	100,0	100,0	100,0
Employed	48,8	55,9	42,4	14,4	18,6	10,4
Unemployed	12,1	13,3	11,0	2,9	3,5	2,3

¹³ In LFS persons with disabilities are defined as persons holding a legal confirmation (certificate) of disability (the so called legal criterion)

Economically inactive	39,1	30,8	46,4	82,7	77,8	87,3
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Source: LFS

The difference between employment rates for persons without disabilities and disabled persons aged 15 years and more in the fourth quarter of 2002 was 34.4 percentage points (37.3 for men and 32 for women).

Degree of disability is also an important factor affecting employment rate of persons with disabilities. According to LFS, in the second quarter of 2002 a total number of disabled persons in working age (i.e. 15 years and more) was 2,592 thous., of which:

- in a total number of working age persons with a considerable disability degree - 344 thous. – only 28 thous. (8.1 %) are employed,
- in a total number of working age persons with a moderate disability degree - 942 thous. – 171 thous. (18,2 %) are employed,
- in a total number of working age persons with low disability degree 1.306 thous. – 354 thous. (27,1 %) are employed.

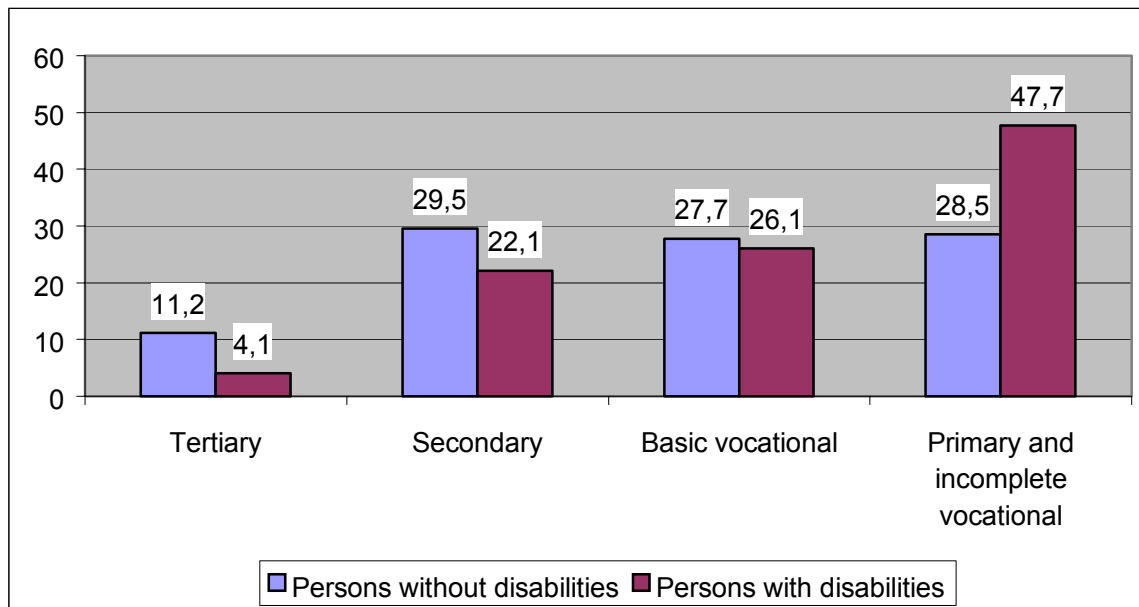
When analysing a labour market situation of disabled persons we should also take into consideration employment structure of this group by residence and character of employment. An important labour market element for persons with disabilities are sheltered work establishments, where disabled persons account for at least 40% of the labour force. About 200 thous. disabled persons found job on a sheltered labour market (which accounted in the fourth quarter of 2002 for about 33% of a total employment of persons with disabilities). Before 1989, on the contemporary sheltered labour market, about 180 thous. persons were employed. A considerable number of these persons have lost job after liquidation of the co-operative system of employment of persons with disabilities, which was functioning within the years 1950-1989. Since 1991 a number of sheltered work establishments was progressively growing, from around 500 companies in 1991 to ca 3500 in 2001.

Since persons with disabilities relatively more frequently work in individual agriculture (data for the fourth quarter of 2002 - 47% of persons employed, with 16.3% for able persons), therefore differences between these populations from the point of view of work character are important. Persons with disabilities less frequently are employed as hired employees (respectively 47% and 73.6%), and more often are own-account workers (respectively 36.8% and 17.8%) and more often as contributing family workers (respectively 14.1% and 4.7%).

Differentiation of a situation of disabled and persons without disabilities also relates to economic activity. The difference in activity rate in the fourth quarter of 2002 was 43.6 percentage points (47 percentage points in the case of men and 40.7 percentage points for women). The biggest gap between persons without disabilities and disabled persons (activity rate and employment rate) is observed in a group of persons between 25 and 54 years.

One of the reasons of low level of economic activity of persons with disabilities may be the low level of their education. As earlier indicated, education is a variable which strongly affects the labour market opportunities. The diagram below shows that education structure of persons with disabilities aged 15 years and more is much less favourable than the situation of able persons. A particularly alarming phenomenon is a low percentage of persons with higher education.

Diagram 7. Education structure of persons with disabilities and able persons in the fourth quarter of 2002 (in percent).



Source: LFS

According to LFS, both the unemployment rate of persons with disabilities and a total number of such persons are presently maintained at distinctly higher level than several years ago, although no permanent increasing trend is noted in this regard. In 2002 a total unemployment rate of persons with disabilities was 17.9%, being a bit higher for women (17.6%) than for men (17.0%).

In the case of registered unemployment a distinct growing trend of unemployment level is observed among disabled persons. In September 2000 ca 36.7 thous. persons with disabilities were registered as unemployed. In the end of the second half of 2002, the number of persons with disabilities registered as unemployed persons was 56.5 thous., of which 15 thous. (26.5%) are residents of rural areas. In a total number of persons with disabilities registered as unemployed persons as much as 11.7 thous. (20.7%) are jobless for a period from 12 to 24 months, and 19.3 thous. (34.1%) – more than 24 months.

Hitherto activities

Activities carried out within the framework of national policy in relation to persons with disabilities in the sphere of vocational rehabilitation and employment mainly aim at reaching possibly highest level of functioning of these persons, the quality of their life, integration and vocational mobilisation. To develop a stable, coherent and clear system of employment and vocational rehabilitation of persons with disabilities, these issues have been reflected in the national legal order, and the rights and obligations of these persons and their employers have been guaranteed in the main legal act in this sphere – the law of 27 August 1997 on vocational and social rehabilitation and employment of persons with disabilities (Dz. U. /Journal of Laws/ No 123, Text 776, with amendments) and in executive regulations issued on its basis .

The law governs in detail the issues of vocational rehabilitation and widely conceived employment of persons with disabilities both in the sheltered work establishments and on the open labour market. Vocational rehabilitation referred to in the law is aimed at facilitating to a disabled person finding and maintaining of appropriate employment and professional

advancement as well as at enabling such person to take advantage of vocational guidance, training and job placement. The law also specifies the special responsibilities and rights of employers in connection with employment of persons with disabilities.

- The disabled are a special group targeted by labour market programmes, as well as programmes aim at counteracting social exclusion. Institutions working for the benefit of disabled persons or providing assistance to the disabled include:
- State Fund for Rehabilitation of Disabled Persons (PFRON) which is a state special purpose fund as defined by the law from 5 January 1991 – Budgetary law and operating on the basis of the law from 27 August 1997 on vocational and social rehabilitation as well as employment of disabled persons; the Fund implements its tasks in its headquarter and in 16 regional branches;
- poviats self-government (poviat labour offices, job counselling centres, poviat family assistance centres);
- state budget (mainly reimbursement of social insurance contributions);
- non-governmental organisations (at central and local level).
- Activities which have been undertaken since 1991 and aimed at creating a labour market, which is friendly to disabled persons, focused on supporting the following groups:
 - disabled persons that are looking for a job – e.g. in the form of vocational training, low interest loan for starting business, assistance in purchase of special work equipment, reimbursement of certain costs related to creation of special workplaces and subsidized remuneration,
 - disabled persons during rehabilitation process – in the form of co-financing their participation in rehabilitations teams and permanent forms of rehabilitation in therapeutic activities workshops and professional activities plants,
 - employers running sheltered workshops – in the form of co-financing interests of the bank loan, co-financing remunerations of mentally sick persons, mentally disabled persons, epileptics and blind persons, reimbursement of training costs for disabled persons and single loans for modernisation,
 - other employers hiring disabled persons – in the form of partial reimbursement of remuneration costs and costs of social insurance contributions (ZUS contributions) paid for the disabled.

Besides, there are several programmes aimed at the growth of employment of persons with disabilities. They should promote flexible employment forms (programme Telework), promote new technologies in the work place by co-financing the purchase of computers and software (Computer for Homer) and support employment through assistance for employers (Braille 2000, the Programme of maintaining employment of persons with disabilities, An opportunity) or supporting employment of disabled persons (Junior).

Activities listed above do not exhaust all the needs related to professional activity of disabled persons. Those needs cannot be sufficiently met due to previous negligence, present economic stagnation and the tight situation of employers, who are forced to limit operating costs of companies, decide to limit employment - less efficient employees (disabled persons are usually perceived as less efficient) or employees receiving even the lowest pensions are more likely to be dismissed. Employers do not notice difference in abilities of disabled persons,

they tend to perceive them as homogeneous group. The relatively low level of qualifications, which is typical for disabled persons creates additional risk of redundancy.

Evaluation of completed tasks clearly indicates that the scale of actions is inadequate. Statistical data shows that in 2002 only 8,500 disabled persons used job counselling services offered by poviats labour offices (so 9.2% of disabled being in the registration during 2002). The most important for the disabled forms of services i.e. individual counselling and tests were used respectively by 7.6% and respectively 0.67% of the total number of unemployed persons with disabilities being in the registration during 2002. The same disadvantageous trends are observed with regard to advisory services. Only 1.2% of registered disabled unemployed persons were assisted with regard to selection of appropriate job and only 3.7% were provided assistance with regard to job search techniques, assessment of abilities for particular job or conducting individual business activity¹⁴.

Therefore, the most important element of the system of vocational rehabilitation, understood as providing disabled persons with a choice and possibility for pursuing a professional career matching their abilities and talents, is to ensure proper job counselling services. Counselling services offered to disabled persons should concentrate on individual counselling services devoted to proper assessment of abilities and professional goals of a disabled person, selection of re-training as well as (if necessary) assistance in adapting to new work environment¹⁵. At the present moment these tasks are implemented by employment services operating within the framework of poviats authorities (poviat labour offices) as well as Centres of Information and Career Planning and Methodical Centres for Information and Job Counselling (situated within voivodship labour offices).

Financial instruments should play an important role in the vocational mobilisation of the disabled. Present financial incentives used for promoting disabled persons in the labour market resulted, on one hand in a development of protected job market, which was observed between 1991-1998 (increasing number of sheltered workshops) and employment of approximately 200,000 disabled persons in conditions adjusted to their needs with ensured rehabilitation services, but on the other hand in limited interest of employers in employing disabled persons beside protected job market, which should be accessible only to person with severe disability.

The present system has exhausted to a significant extent its potential and in the contemporary conditions this system is relatively expensive and not very efficient, especially with regard to further development of labour market, which is open and friendly to disabled persons. A modified system of professional and social rehabilitation should provide actual support for the activity and independence of the disabled persons themselves, and of the local communities, as well as social partners working for the disabled. It is imperative to strengthen the capabilities of employment services (in particular job advisors) with regard to active forms of work with disabled jobseekers, as well as employers. This will involve the introduction of new methods in assessing professional capabilities of disabled persons considering a degree and type of disability. It will also include the establishment of specialist training and

¹⁴ In 1997 regulations were introduced making it possible for self-governments to establish specialist training and rehabilitation centres, which would support the existing services in the process of diagnosing of the capabilities and capacities of the most severely disabled. Until now no such centre has been established.

¹⁵ Such is the character of the “*Junior*” Programme (implemented within the context of the “*First Job*” Programme). It includes a new approach of vocational counselors to supporting the disabled, which involves not only the identification of the vocational predispositions and appropriate potential jobs, but also work with the future employer and co-workers, preparing them for work with a disabled colleague.

rehabilitation centres for those disabled, who cannot take advantage of the generally available services.

Modified forms of promoting the disabled on the labour market should concentrate on introducing individualised programmes for professional rehabilitation, creating a “path” leading to the increased professional capabilities. As a result of the more efficient operation of PFRON and better financial instruments addressed to professional rehabilitation centres and social partners, disabled persons will be provided with an integrated rehabilitation service, facilitating the road of the disabled to self-reliance on the labour market. Of great importance will be the change in the approach to protected employment and transition to employment in the open labour market for those disabled persons, whose professional abilities and type of disability would allow them to meet requirements of employers. Sheltered workshops will not be, as it is today, the “final” employer but only one of elements of the system leading to professional inclusion of the disabled. Within this context it is also necessary to introduce a more rational scale of support addressed to employers, which will be linked to actual commitment of employers to the professional rehabilitation of disabled persons, and to change incentives in the direction of supporting employers (for example through grants) who will be employing the disabled within the open labour market.

2.2.1.5 Place of residence

An important structural problem faced by Poland is deep diversification from the standpoint of socio-economic development (cf. table 5 and map 1 in annexe 5).

With regards to the regional levels of unemployment in the years 1999 – 2002 the numbers increased in all voivodships; however, the most significant increase was observed in the Silesia voivodship where the number of unemployed grew by 119,900 (57.0%).

It should be stressed that the most significant growth in the number of unemployed occurred in regions with large cities (Wielkopolskie, Mazowieckie, Małopolskie), i.e. in the regions with the traditionally and currently maintained the lowest unemployment rates. It should be expected that as a result of the expected acceleration in economic growth, unemployment will most rapidly decrease in these same regions, while the effects of economic growth will be far less noticeable in the regions with the most severe problems with structural unemployment. As a result the gaps between the regions will increase. Therefore regions with traditionally high unemployment should become the main recipients of employment promotion programmes financed by the state budget and structural funds.

After analysing Polish regional unemployment the following can be concluded:

- voivodships connected with large urban agglomerations possessing a rich and varied economic structure are characterised by a lower unemployment rate,
- voivodships located in Northern and North-Western Poland, where before 1989-1990 state run farms were dominant, are characterised by high unemployment (economic monoculture),
- the highest unemployment occurs in economically underdeveloped areas, mainly rural, where privatisation resulted in the unemployment for former state farm employees,
- an important factor influencing the scale of regional differentiation of unemployment is the very low level of spatial mobility of the population.

The levels of internal migration in Poland have decreased during the period of political transformation. This may be related to an increase in living expenses, combined with uncertainty about finding employment in another region, low levels of social security which influence the readiness to take the risk of changing work and moving, as well as to the

insufficient number of housing resulting in high rents and selling prices. What is more research has shown, that the unemployed are less willing to migrate, than those who remain employed¹⁶. As a result in the short period no marked increases in the level of mobility of the population in Poland should be expected, and it is necessary to undertake actions for bridging the regional gaps.

Beside regional differences there are also significant difference in social and economic development between towns and rural areas. Rural areas cover about 93% of the entire territory of Poland and are inhabited by 14.7 million persons, i.e. about 38% of the total population. This situation is reasonable stable, as during the 1990's the rate of migration from rural areas had fallen. Almost a quarter of the work force is still engaged in agricultural production, although in most cases these are not full time jobs.

Rural areas in Poland are characterised by large scale poverty. 45.6% of rural families live in relative poverty, three times more than the national average. Employment of children is a stable element of strategies adopted by poor families. Retirement benefits and pensions have for many households become the main source of income, which is a new issue. In many cases it is the only stable income for the entire family. The most common methods for coping with poverty include: production of food for their own needs, assistance of neighbours, illegal employment, seasonal collection of fruits and mushrooms in forests, assistance provided by family and social assistance centres.

The situation of inhabitants of rural areas on the labour market is differentiated and depends also on whether they own a farm or not. Among the group of rural inhabitants – people living on their own farms - the rate of economic activity in the IV quarter of 2001 was at the level 65.1%, the employment rate was 58%, the number of economically passive persons amounted to 2.2 million persons in a population of 6.3 million persons – i.e. 35%. In the case of the group of landless rural inhabitants, which includes former employees of state owned farms, the rate of economic activity was 46.3%, the employment rate was 33.8%, unemployment rate 26.8%, the number of economically passive persons amounted to 2.8 million persons in a population of 5.1 million individuals – 54%.

In the last few years unemployment in rural areas also increased. In December 1999 there were 1.1 million unemployed residing in the rural areas, while at the end of December 2002 this number had increased to 1.34 million. However, unemployment in rural areas is not limited only to persons registered in labour offices. The general agricultural census, which was completed in 1996, has shown hidden unemployment in agriculture concerning approximately 0.9 million persons. Other estimations of hidden unemployment in agriculture talk of between 0.8 and 1.2 million people.

Among the factors contributing to high unemployment level in rural areas in 1990-2002, there is mentioned the reduction of employment:

- in the former state-owned farms from 400 thousand to 120 thousand, which means unemployment growth by 280 thousand,

¹⁶ This is a result of the fact, that the costs tied to changing a job for the employed are lower than the costs of loss of social benefits in the case of the unemployed. For the unemployed with relatively low level of education the risk related to job search in another region is also higher than in the case of relatively better educated persons with employment. Cf. A. Chłóń, M. Grabowski, Uwarunkowania rozwoju regionalnych rynków pracy w Polsce, IBnGR, 2000.

- in rural production co-operatives, co-operatives of rural circles and communal co-operatives „Samopomoc Chłopska” from 350 thousand to 150 thousand, which means unemployment growth by 200 thousand,
- in agricultural holdings, due to general decrease in area of arable land (1.5 – 1.7 million ha of fallow lands) and extensification of the structure of agricultural production and the livestock, by 300 thousand persons.

The rural unemployment level (in particular hidden unemployment) is also affected by the phenomenon of taking over the surplus manpower existing before 1989 in many enterprises, mainly state-owned ones, and by the phenomenon of reaching the productive age by generations with no job opportunity.

The unemployment rate in rural areas is subject to regional diversification. The highest unemployment rate in rural areas is observed in warmińsko-mazurskie (33.1%) and zachodniopomorskie voivodships (28.9%), and the lowest – in małopolskie voivodship (10.4%). It is mainly connected with the higher share of collective agriculture (state and cooperative farms) in northern and western part of Poland before 1989¹⁷.

One of the key factors impacting on the differences in the labour market situation of the rural and urban populations is the level of education. People with university level education are 5 times more numerous in towns and cities as in rural areas whereas people with secondary level education are twice as numerous in urban areas than in rural areas. The lower education level of rural residents, as compared with education level of residents of urban areas, contributes to their lower attractiveness on local labour markets, which are mainly concentrated in towns. Besides, the growing costs of secondary and tertiary level education (costs of travel, accommodation and maintenance) contribute to the worse access to education in rural areas.

Therefore the main measures addressed to inhabitants of rural areas should involve improvement of the quality of human resources, through providing young persons with opportunities for obtaining a good education matching labour market needs. Because research has shown, that investments are being made in regions with better infrastructure, one of the first steps which must be taken in order to increase the attractiveness for investors of rural areas and small towns is to invest in infrastructure (and to some extent actions for upgrading education can be viewed in the same categories).

The creation of jobs for those persons and downsizing of present unemployment are the major challenge facing Poland with regard to a development of rural areas. In the context of low mobility of the rural population and the small chances of any significant increases in this mobility in the near future it is clear, that actions for improving the situation in rural areas must be concentrated on current locations and should target decreasing the developmental gaps between regions.

Hitherto activities

Activities in favour of new jobs creation in manufacturing outside agriculture, in services and trade are carried out by the Agricultural Property Agency (APA) and the Agency for Restructuring and Modernisation of Agriculture (ARMA), as well as within the framework of the Programme for Rural Areas Activation.

¹⁷ after draft *Plan of Rural Areas Development for 2004-2006* Ministry of Agriculture and Rural Areas Development, Warsaw, November 2003.

APA programmes focus on combating unemployment in areas of former state-owned farms. Actions within APA programmes consist inter alia in:

- co-funding or guaranteeing loans from the Labour Fund for unemployed former employees of the state-owned farms to enable them business start up, as well as guaranteeing bank credits or loans for individual and legal persons running business connected with the management of former state-owned farms,
- implementation of the programme of micro-loans for own business in co-operation with the Foundation for Supporting Rural Areas,
- supporting local programmes of combating unemployment (including the participation in creation of local guarantee funds) – the programme addressed to territorial self-governments at gmina level.

The Agency for Restructuring and Modernisation of Agriculture supports activities aimed at the creation of new jobs, inter alia by: granting from the Labour Fund loans for starting and running business in rural and rural-urban gminas, as well as co-funding of investment credits generating new permanent jobs outside agriculture in rural and rural-urban gminas and in towns with not more than 20 thousand inhabitants. Thanks to these activities a total of 37 thousand new jobs were created in 1996-2001.

Beside the instruments of active labour market policy (as free retraining of unemployed persons from rural areas and farmers, loans for start-ups in agriculture or outside this sector), measures targeted at persons from rural areas are carried out within the framework of the *Programme for Rural Areas Development*. The programme is implemented with participation of means from the World Bank credit, and it is aimed at widely conceived economic development of rural areas. The objective of the programme is to provide financial, investment, knowledge and skill based inputs into the development of rural areas, involving increased employment outside of agriculture, support for the strengthening of self-government and regional development, assistance in building institutions necessary to obtain the EU pre-accession and structural funding. The aims are to be achieved through a programme of investments in the technical infrastructure in rural areas, and education, training and micro-credits.

1. Component A: Micro-credits

The component finances micro-credits and grants for investment costs, and advice and training in running non-agricultural businesses.

The micro-credits are provided through competitively selected micro-credit institutions, which must co-finance each credit from their own resources at a 25% rate. The maximum value of the credit is the equivalent of 4,948 EUR, with the maximum re-payment period set at 36 months, and interest not exceeding 9%. The grants cannot exceed 833 EUR and can be used for the procurement of a fixed asset by those beneficiaries of the micro-credit scheme, who have started in non-agricultural business.

The component is implemented in rural and rural-town gminas, and in towns with less than 20000 inhabitants, located in five voivodships (Zachodniopomorskie, Małopolskie, Kujawsko-Pomorskie, Warmińsko-Mazurskie, Podkarpackie). It targets the unemployed, graduates, farmers with farms of less than 10 ha, and people starting or operating non-agricultural businesses.

World Bank loan resources for the micro-credits and fees for the credit institutions are disbursed by the MoELSP through the Bank Gospodarstwa Krajowego, on the basis of the agreement of April 2001.

The implementation of the component was initiated in January 2003 and will continue till May 2004. 16.53 million EUR have been earmarked for the component, including 10.29 million EUR from the World Bank loan, 2.87 million EUR from the national budget, and 3.36 million EUR from the micro-credit institutions' own resources.

2. Sub-component B1

The sub-component B1 is at an advanced stage of implementation. About 50,000 people have benefited from various forms of support. The World Bank has under an initial assessment evaluated the results of the implementation of the programme as "satisfactory".

Programme of Reorientation and Retraining

The aim of this programme is to support economic development, increasing the income of and mobilising the population in rural areas, through the provision of support in the development and use of their vocational skills.

The programme provides financing for the following types of actions:

- active forms of counteracting unemployment (services related to employment, training, periodical employment);
- support for the development of entrepreneurship (business support centres, business incubators);
- local development planning, targeting the development of entrepreneurship and the creation of new jobs.

The services are provided by service providers selected by tender and contracted by the voivodship labour offices.

The programmes budget totals 40.48 million EUR and is financed in 49% by the World Bank loan and in 51% by the national budget.

Regional Economy and Labour Market Forecasts

The aim of the project is to develop an information on the economic and labour market situation in the regions so as to:

- develop accurate forecasts of economic trends with special reference to their impact on the labour markets,
- prepare data allowing for the forecasting of unemployment in the voivodship,
- identify changes in the situation in enterprises,
- provide information to individuals, helping them in making career choices, and to institutions active in HRD.

The implementation of the surveys has been divided into three stages: development of the pilot survey, implementation of the pilot survey, implementation of two half-year surveys and related training in 7 voivodships participating in the programme (Zachodnio-Pomorskie, Małopolskie, Kujawsko-Pomorskie, Warmińsko-Mazurskie, Podkarpackie, Świętokrzyskie, Lubelskie).

The results of the surveys are intended to complement the data available at the voivodship labour offices, powiat labour offices, and in Central Statistical Office (macro-economic and long-term data). They will be used to develop an information resource for developing short-term forecasts of economic trends and related changes in the labour market. Delegated powiat labour office staff participate in the survey visits to enterprises.

The research is conducted on a layered sample of enterprises – the priority being to identify employment niches for the rural area population.

Implementation of the surveys was initiated in the beginning of 2002 and they will be continued throughout 2003. The budget of the project is 494 780 EUR.

3. Sub-component B2 – Education

The overall objective of the education sub-component is to improve the efficiency of the education system by enhancing the quality of teaching in primary schools and lower secondary schools (gymnasia), and improving the utilisation of educational resources.

The education sub-component finances seven major activities:

- school rehabilitation,
- school network consolidation (refurbishment and equipment of dayrooms),
- training program for teachers and school directors,
- information technology training,
- purchase of computer equipment,
- purchase of educational materials (teaching aids),
- creating and maintenance of Internet-based Educational Resource Center.

The refurbishment-investment part of the sub-component B2 is implemented in rural and rural-town gminas, located in sixteen voivodships.

The training-didactic part of the sub-component B2 is implemented in rural and rural-town gminas, located in seven voivodships (Kujawsko-Pomorskie, Lubelskie, Małopolskie, Podkarpackie, Świętokrzyskie, Warminsko-Mazurskie, Zachodniopomorskie).

The implementation of the sub-component was initiated in summer 2001 and will continue till August 2004. The sub-component is at an advanced stage of implementation.

The education sub-component budget totals 31.4 million EUR, including 20.2 million EUR from the World Bank loan, and 11 million EUR from the local governments budget, and 0,2 million EUR from the national budget.

2.2.1.6 Repatriates

Repatriates are a special group experiencing labour market inequalities resulting from their previous residence. Repatriates mean persons of Polish origin, who have come to Poland on a basis of repatriation visa. Such visas are issued to persons from former republics of the Union of Soviet Socialist Republics, who have stayed in these republics in effect of deportation, exile or persecution for national or politic reasons, experienced by them or their ancestors. A person, who crosses the borders of the Republic of Poland on a basis of repatriation visa, acquires Polish citizenship ipso jure. The organised repatriation has been conducted in Poland since 1996. The years 1996-2002, within the framework of repatriation, 4692 persons settled in Poland.

The principles of applying for repatriation visa as well as forms of assistance provided to repatriates from the state budget (covering the cost of travel, financial means for the settlement, covering the costs connected with education of minors, partial coverage of costs of repair of accommodation) have been laid down in the *law of 9 November 2000 on repatriation* (Dz. U. /Journal of Laws/ of 2000, No 106, Text 1118 with further amendments). The law also defines the forms of vocational mobilisation of repatriates, covering refund to the employer of a part of remuneration costs, work place equipment, vocational training.

However, at present this form of vocational mobilisation of repatriates functions in a limited scope. Factors contributing to limited use by employers of repatriates' employment costs' refund include:

- unfavourable - from the point of view of the employer – condition of receiving such refund – repatriate’s employment for minimum 4 years (a draft amendment of the law on repatriation provides for more advantageous solution – 2 years’ employment to receive the refund),
- lack of employers’ awareness of such opportunity of vocational mobilisation of repatriates (a draft amendment of the law on repatriation provides transfer of tasks in the field of vocational mobilisation of repatriates to poviats, which should contribute among others to co-ordination of activities aimed at vocational mobilisation of repatriates with actions carried out by poviat labour offices),
- lack of coherent system of vocational and social inclusion of repatriates – the present system covers only short adaptation courses and teaching Polish language.

The last factor is one of the most important barriers in vocational mobilisation of repatriates taking into account the needs of this group. The new environment is distinctly different from earlier environment of repatriates. Changes relate to social, cultural and political conditions. Integration problems of repatriates result from poor knowledge of Polish language, lack of qualifications corresponding to the requirements of the Polish labour market, problems in contacts with administration offices. Besides, the Polish model of individual repatriation, where families of repatriates do not pass through transitory centres, is a source of problems with the maintenance of permanent contacts with other repatriates, even intensifying the sense of alienation and loneliness⁷

The mentioned problems cause that repatriates are often on the margin of the society where they live (most of repatriates live in rural areas and in small towns) and become the social assistance beneficiaries.

2.2.1.7 National or ethnic origin

Despite the declaration of equal rights and civil freedom for the members of national and ethnic minorities, **the group particularly threatened with unemployment is the Roma community** (during the National Census of Population and Housing in 2002 - 12 731 Polish citizens declared Roma nationality, and 15 657 declared the use of Roma language in the household). Most of the Roma are in a very difficult social and economic situation, which is a result, among other factors, of the policy of the authorities of the Republic of Poland, providing compulsory assimilation of the Roma. Instrumental in the implementation of that policy was so-called productivisation and displacement action, under which in the sixties forceful settlement of the Roma was carried out, who had mostly led a nomadic life, being the basis of their material existence. On the other hand, the Roma that had left a settled life (Carpatian Roma) were employed in large industrial factories, and later as non-skilled labour force first lost their jobs in result of the restructuring of industry.

However, the obstacles on the way to improve the employment level in the Roma community result also from their low level of education, disappearance of professions traditionally practised by the Roma, their cultural distinction, inadequate knowledge of the Polish language, or else the popular reluctance, based on stereotypes, to employ them. All this contributed to the fact that traditional forms of counteracting unemployment are not effective, and the Roma community is particularly strongly threatened by the long-term unemployment. The results of the survey - *Romas-unemployment. Elements of description of social situation of Romas in Poland*, commissioned in 1999 by the National Labour Office, each third person

of Roma nationality has not completed the primary school, only 0.8% of surveyed population had higher education. 43% of respondents mentioned occupational work as the source of incomes. More than 32% declared the willingness to start employment, and about 30% had contacts with labour offices. 25% of respondents expressed the willingness to participate in vocational training courses.

Similar problems are also encountered by people granted refugee status. In 2002 the refugee status was granted to 279 foreigners in Poland (the number of applicants was 5169). The most numerous group consists of Russian citizens (206 citizens of the Russian Federation declared Tchetchen nationality) and citizens of Bielarus (9 people). In the period of 1991–2002 about 30 thousand people applied for refugee status. However, it was granted to 1548 people.

When granted refugee status and provided with the related documents (a Geneva Convention Journey Document, a residence card issued for two years with possibility to prolong for subsequent two-year periods), a foreigner very quickly faces the need to earn her/his living. However, despite of her/his due right to work, chances to find any legal employment are minimal. The exceptions are people qualified to teach foreign languages. Most of employers are afraid that employing a refugee involves the need for additional administrative procedures and additional costs of employment. Moreover, similarly to the case of repatriates, the barriers to find employment are:

- non-existing or poor knowledge of the Polish language,
- lack of qualifications adequate for the requirements of the Polish labour market,
- lack of documents certifying education and vocational experience,
- lack of knowledge of the situation on the Polish labour market and the requirements of employers,
- cultural differences and resulting from them problems with professional and social adaptation,
- personal problems related to the refuge experiences,
- health.

Hitherto activities

Since 2001 the *Pilot governmental programme for the Roma community in Malopolskie voivodship in 2001 – 2003* has been implemented. The programme is of a complex character. Apart from the activities aimed at supporting the Roma culture, improving their education level, increasing the protection and improving their health, popularising of information about the Roma community, and dissemination among the Roma the knowledge of the reforms introduced in the country, one of the aims of the *Programme* is also counteracting unemployment of the members of this ethnic minority.

Activities in view of improving entrepreneurship include motivating to qualification change, training towards active attitudes, developing qualifications for occupations in demand on the labour market. Such activities are carried out by subsidised employment, qualification improvement courses, and organisation of work places in professions traditionally practised by the Roma community.

The solutions applied in the *Pilot programme* shall be gradually introduced all over the country under the *Programme for the Roma community in Poland*.

Since 2001 the *Regulation of the Ministry of Labour and Social Policy of 1 December 2000 on detailed rules of assistance for refugees* has been in force, specifying the amount of benefits, forms and the extent of assistance, way of proceeding in these cases, and the terms of

suspension or refusal of assistance. On the ground of this regulation, refugees have the right to assistance aimed at supporting their social inclusion.

Assistance is offered for the period of 12 months within the frames of an individual integration programme, which covers means for living, paying expenses related to learning the Polish language, and the non-material assistance (counselling, help in dealing with offices, institutions, psychological assistance, legal advice etc.).

The period of 12 months, in which the integration programme is carried out – as is proved in practice – is not long enough for complete implementation of the objective. It is advisable to prolong the programme to enable this way participation in additional language training and a broader access to counselling, so important to the process of social inclusion of the refugees.

In 2002, the Polish government, represented by the Department of Social Assistance of the Ministry of Economy, Labour and Social Policy (MoELSP), concluded an agreement with the Dutch government on using the Dutch experience to work out a more integrated policy of the Government on the inclusion of refugees. The agreement resulted in the initiation in January 2003 of a project to work out an integrated policy of the Government on refugees under the programme *Matra*.

2.2.1.8 Others

Besides the above mentioned reasons of discrimination and / or inequality on the labour market, **it seems that also other factors affect opportunities to find employment, such as: homelessness, alcohol and drug addiction, imprisonment history.**

The complex situation of the homeless, brought about by both individual conditions (lack of proper qualifications, bad physical and mental condition, unstable way of living, lack of financial means) and employers' attitudes, does not favour the return on the labour market. Taking into account the particular character of the group, it is difficult to estimate the scale of homelessness. Only rough estimation of the number of homeless people is possible as something between 50-80 thousand people. One of the form of counteracting social exclusion, provided for in the law on social assistance, is the programme Homelessness, carried out by way of individual programmes of coming out of homelessness, worked out by social workers of social assistance centres. The programme provides for the following forms of support to homeless persons: assistance to get due benefits, including health insurance; guiding and help in the process of addiction treatment; assistance in finding employment; assistance in finding legal and psychological consultation; and help in solving family and accommodation problems. Under the programme, the Ministry of Economy, Labour and Social Policy grants subsidies to non-governmental organisation acting on behalf of people threatened with homelessness or homeless.

It is difficult to state unanimously in what way the alcohol and drug addiction influence the situation of the addicted on the labour market. One can only assume that just like in case of the homeless, barriers to find employment are health problems, unstable way of living. Besides, this factor may be entangled with other factors that discriminate or affect disadvantageous situation on the labour market. The number of the people addicted to alcohol is estimated at about 800 thousand - 1 million. On the ground of clinical research, the percentage of unemployed among the addicted to alcohol amounts from 17% to 44%. The number of the people addicted to other than alcohol (and nicotine) psychoactive substances estimated at about 45-65 thousand. In the nineties, the number of patients treated for drug addiction, just like the number of the alcohol addicted, has increased several times.

At present this group of people is addressed with aid supplied under the system of social assistance. In compliance with the law on social assistance, the persons and families in difficult living situation, due to for example alcoholism or drug addiction, are given assistance. In this way, people and families, where alcoholism or drug addiction is the main reason of their difficult living situation, are given assistance in the form of benefits and support in kind. They can also accept the offer of centres of support, including centres of crisis intervention. Yet, the group is not identified in the programmes of vocational training. It is known, however, that results of their treatment would be much more sustainable, if their treatment were supplemented with measures for their employment.

People released from prison have often low or outdated qualifications, with no knowledge of the labour market and the requirements of employers. It does not also seem irrelevant in this context to point out their difficulties to adjust to the life outside of prison, and their social stigmatisation. People encountering problems with adjusting their life after imprisonment might look for support in line with the rules defined in the *law on social assistance*. Co-operation of the centres of social assistance with non-governmental organisation, dealing with problems of ex-offenders, plays an important role in the system of supporting people released from prison. Post-penitentiary assistance should be, however, supplied by way of the programmes for ex-offenders, which would help them to return to life in the society, to find employment. An example of such a programme is the all-Poland programme *Preparation of prisoners to enter the labour market*. Co-operation between the employment service and penitentiaries has been most often carried out on the ground of agreements between voivodship labour offices and voivodship teams for post-penitentiary assistance. One of the forms of action under the programme consisted in establishing labour clubs in penitentiaries, where vocational counsellors conducted sessions on active behaviour on the labour market.

For the youths threatened by social exclusion it is also difficult to enter labour market. Typical indicators used for analysing the phenomenon of social exclusion among young people is the proportion of youths remaining outside of employment and education, as well as the number of students repeating school years. In 1999 in Poland 4% of women and 5% of men in the age category 15-19 remained outside of employment and education, and 31% of women and 23% of men in the age category 20-24 years. With regard to the percentage of students repeating school years in the 1990's, it was at the level of 1-2% for primary schools (the highest proportion was observed for classes 5-7).

The young people, which are the most threatened by social exclusion usually have had contact with the courts. During 2000 the courts decided on 8, 900 youth demoralisation cases (2,800 cases involving persons below 12 years old, 3,800 in the age group of 13-15 and 2,300 in the age of 16-17). Of this number 38% were avoiding school, 25,700 juveniles were tried and convicted with various types of penalties.

Lack of family or inadequate family support also increases the risk of social exclusion. In 2000 51.7 thousand adolescents lived in care and rearing centres, including 3.1 thousand persons residing in special reformatory institutions for troubled youth. These young people face serious problems with adjusting to life outside of these institutions. One of the most important areas is that of the labour market, i.e. problems with finding and keeping employment.

An integral part of the social assistance system are schemes aimed at encouraging an independent life for those youths leaving care and rearing institutions. Those schemes are implemented by Poviats Family Assistance Centres. In line with the provisions of the law on social assistance persons coming to adulthood in foster families and persons leaving certain types of care institutions, social assistance houses, shelters for adolescents, reformatories and

special education and rearing centres are covered by assistance schemes aimed at ensuring their independence and integration with the community. This assistance can include social work, financial aid for promoting independence and for continuing education, help in finding adequate accommodation, including household supplies, and help in gaining a profession. In the year 2000 6,388 persons received this kind of assistance aimed at promoting independence and integration, while in 2001 assistance was granted to 9,427 persons.

Persons below the age of 18, whose professional career is more uncertain in comparison to their peers are not covered by special programmes, although in this case there are several institutions and measures aimed at meeting their needs with respect to education and upbringing. The main institution is the Voluntary Labour Corps (OHP)¹⁸. Presently, the OHP is seen as one of the elements creating system for re-socialisation and re-education of youth, addressed to two groups of young persons. The first group includes youth with smaller opportunities, originating from dysfunctional, socially maladjusted families, requiring and searching protection, and possibilities for continuing education and obtaining job. The second group includes already educated young persons, having certain professional qualifications, who are however threatened by unemployment.

The system created by the Voluntary Labour Corp covers the territory of the entire country and includes: 298 labour corps, 26 educational institutions, 49 centres for education and work, 9 training centres, 22 vocational training centres, 49 labour offices for young persons with 41 local branches, 88 job clubs, 11 tourist offices for young travellers, 34 auxiliary entities. Every year approximately 32,000 persons participate in their activities. In the year 2001 this group consisted of 24% of young persons from single parent families, 54% from families facing financial difficulties, 41% from families experiencing unemployment, 18% from pathological families. A majority of youth participating in the OHP activities have a history of school problems, 16% were sentenced for small offences. The following sums were spent on the activity of the Voluntary Labour Corps: in 2000 — 91.6 million, in 2001- 93 million, and in 2002 - 91 million PLN.

Other important initiatives include: the *Programme for Mobilising Unemployed Youths — PAM* (1993-1994); activities addressed to young people in the age group 15-24 years, implemented between 1995-1999 and monitored as a state administered programme *Promotion of Youths Professional Activity*; the *National Programme for Employment of Graduates — Graduate* implemented by all labour offices (from 1998 to the present); creating and developing a network of *Centres for Information and Professional Career Planning* (since 1994; presently there are over 50 centres) – affiliated to the voivodship labour office. Within the context of long-term activities the Agenda for the Voluntary Labour Corp 2005 is an important document. It includes the following proposals: establishment of Centres for Prevention and Social Intervention in each poviát, providing training preparing for participation in the life of a local community; encouraging young persons to assist persons in need (implementation of the idea *I am needed*); and preventing cultural degradation of youth (*Anima*).

2.2.2 Entrepreneurship

As it was emphasised in the general part of the analysis, **an average level of entrepreneurship in Poland is relatively low**. Among the reasons restricting the development of small and medium enterprises (SMEs) the following are most often

¹⁸ OHP is a state institution, established in 1958. It accepts only participants below 18 years of age.

mentioned: maladjustment of the tax system to the specific character of SMEs (including too high taxes), difficult access to too expensive credit and limited scope of guarantees and warrants, incoherent regulations governing business activity and excessive legal and administrative regulatory framework, as well as maladjustment of regulations in all fields to the specific and different character of small companies' functioning. There is one more barrier in entrepreneurship development: limited know-how on establishing and running business.

It should be mentioned that **the level of entrepreneurship depends on such socio-demographic features as age or education**. This correlation is particularly strong in the case of education. The correlation between entrepreneurship and education is negative – the lower level of education, the higher share of self-employed persons and employers in total employment – for persons with higher education it is 12.8%, for persons with secondary education – 21.7%, and for persons with the lowest qualifications – already 41.4%. Such structure may also result from the high share of persons with the lowest qualifications in agriculture.

The relationship, although not so obvious as in the case of education, also exists between the level of entrepreneurship and the age of unemployed persons. In all age groups the main method of seeking job is registration in the Poviast Labour Office (2/3 of unemployed persons), and then job seeking through relatives and acquaintances and through press advertisements (1/3 each). Private employment agencies are not popular, it is also not popular to start own business (several percent). It is no surprise that these last opportunities are not mentioned by persons aged 15-19 years, and are rarely mentioned by young persons aged 20-24 years (7,000 cases in the country in a total number of more than 700 thousand unemployed persons in this category). It seems that the reason is connected with objective conditions and not with individual non-existence of entrepreneurship. In the „most enterprising age” - 35-44 years, the number of persons trying to organise their own business was 19,000 in relation to a total number of more than 700 thousand unemployed persons in this category. These regularities in the population of unemployed persons are reflected in the employment structure by status in employment. In age category 15-19 years, there are no entrepreneurs, and in the next (20-24 years) – there are only 11,000 entrepreneurs, that is less than 10% of persons employed in this age.

On the basis of survey carried out on a sample of 200 micro entrepreneurs employing not more than 5 persons and located in towns of at least 100 thousand residents, **two categories of motives for starting own business may be distinguished: business-oriented and defensive**. The following are guided by business-oriented motives: men, well educated, residents of large cities, who have never worked as wage-earners or have worked in the service sector. Defensive motives characterise women, elderly persons, less educated persons, residents of smaller towns, who have lost employment¹⁹.

Hitherto activities

Since 2001 The Polish Agency for Enterprise Development (PAED) has started its functioning and its goal is participation in programmes for economy development, in particular in supporting small and medium-sized enterprises, export, regional development, use of new techniques and technologies, new jobs creation, counteracting unemployment and human resources promotion.

¹⁹ on a basis of collective work ed. by Ewa Balcerowicz *Micro enterprises – economic situation, financing, owners*, CASE.

In 2001 approx. 100 donations were granted by PAED for various initiatives promoting entrepreneurship. In 2002 a total number of grants for initiatives supporting entrepreneurship was 94 (in 2003 - 71 grants). These activities are carried out in co-operation with local authorities which may grant redemption of local taxes or free from these taxes small and medium-sized enterprises as well as support them with other forms of public assistance. This assistance might take the form of free-of-charge access to premises, co-financing of the promotion costs, donations for local financial institutions which grant preferential loans as well as free-of-charge guarantees and warrants.

Numerous tasks related to entrepreneurship promotion refer to enhancing the qualifications of the SME staff. PAED has developed information packages for the entrepreneurs, containing most important information related to conducting economic activity. These packages are available in the Internet in the form of database *The entrepreneur's Guide* and at present contain 374 subjects.

Supporting entrepreneurship takes place also on gmina level and the most important institutions supporting local entrepreneurship are the regional and local development agencies, business support centres, entrepreneurship support centres, entrepreneurship incubators, technological centres and parks as well as warranty-crediting funds.

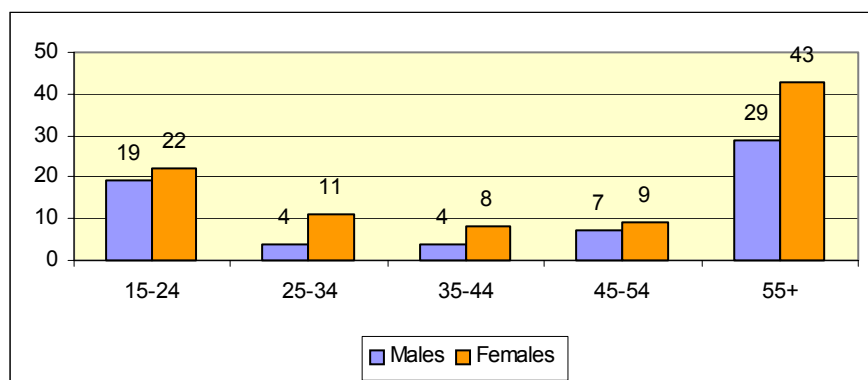
The current directions of employment and social integration policy take into account the role that the entrepreneurship can play in social inclusion. The social co-operatives, introduced to the Polish legal order by the draft of *law on employment promotion and labour market instruments*, can be an effective way out of unemployment and exclusion for disadvantaged groups. Besides, the *law on social employment* provides for business support services, financed by Labour Fund means, for those willing set up the co-operative.

2.2.3 Adaptability

Modern economy often extorts flexible behaviours both of employees and employers. This is particularly important in a situation of high unemployment. Therefore, the share of employment in flexible forms is one of indicators of workers' adaptability to the changing labour market conditions.

In 2002 part-time employment accounted for 10,8% of total number of persons employed aged 15 – 64 years. Such type of employment was more popular among women (13,4%) than among men (8.5%). In the European Union countries, in 2002, 18,1% of all employed persons worked part-time.

Diagram 8. The share of part-time workers in total employment (in %) by age in the fourth quarter of 2002



Source: Central Statistical Office, LFS

The diagram shows that **part-time employment is important for the youngest and the oldest population groups**. In the case of this first group such employment allows to acquire first vocational experience and to combine work with education, while for the latter group it facilitates gradual vocational de-activation. 17,1% of persons aged 15 – 24 years work part time, as compared to 11% of all persons employed. However, it is a natural phenomenon, because a part of these persons have to reconcile education with work. Thus, a large part of persons from this age group consider their actual employment as a transitory one, which is confirmed by the fact that 17.2% of them declare seeking of other – main - employment (as compared to 8% for all persons employed). And 43% of them mention, as a reason for job-seeking, looking for better financial conditions, while 27.5% mention seeking permanent job. However, **the share of women working on a part-time basis is particularly low**, in particular in age groups 25-34 and 35-44 years, that is in a period when many women make their maternity decisions and have to reconcile occupational tasks with family responsibilities. Part-time employment offers an opportunity of reconciling both roles, and in many EU countries, in particular in Scandinavian countries, women's part-time employment creates such an opportunity. Unfortunately, experience of many other countries shows that part-time employment has such negative features as low pay or limited opportunities of occupational development.

Beside the part-time employment, the second important tool of labour market flexibility is fixed-term employment. 2.7% of hired employees were employed on this basis in the fourth quarter of 2001. In this case prevalence of men is observed – 13.8% as compared to 11.5% of women. The year 2002 brought about rapid increase in number of persons employed on a basis of fixed-term contracts – by 30%. It was undoubtedly affected by legal changes – it is presently allowed to conclude many subsequent fixed-term contracts with one person. Besides, unfavourable labour market situation inclines employers to prefer more flexible forms of employment. Unfortunately, this takes place at the expense of workers' security. Fixed-term employment usually covers persons who are less competitive on the labour market – in particular young persons.

As surveys show, **a low willingness to take advantage of flexible forms of employment and work organisation is observed among workers**. In the meantime, this a way to adjust the supply and demand side of the labour market to structural changes and changes in economic situation. These forms of employment are also a means for mobilising persons, for whom permanent, full-time employment would be difficult to take for various reasons²⁰.

Beside the flexible forms of work organisation, adaptability of enterprises is also affected by advanced technologies applied by them. And this in turn is a function of technological development of country as a whole.

In 2000 Poland was the first of the EU candidate countries from the point of view of expenditures on research and development. However, the share of this expenditure in GDP places Poland at a less advantageous position – Poland spent for this purpose only 0.7% of GDP, while Slovenia - 1.52%, and Czech Republic - 1.33%. And expenditures on research and development, measured as percentage of GDP, have not changed since 1995. At the same time, a very low percentage of manpower resources worked in R&D sector – only 0.7%, as compared to EU average of 1.84%.

²⁰ *Labour demand forecasting by qualifications. Hitherto works of the Inter-ministerial Team for Forecasting Labour Demand*, the Report of the Governmental Centre of Strategic Studies, typescript.

The mentioned expenditure on research and development in Poland only in 33% was covered by commercial enterprises. Governmental bodies were the main provider of funds. It reflects the low corporate involvement in research and development. The structure of employees dealing with R&D also confirms this thesis – only around 16% of them work in corporate sector, while more than 70% are employed in research institutes. For comparison, in EU countries 50% of persons dealing with research and development are employed in the corporate sector.

Adaptability of enterprises is also reflected in expenditure on innovative activities. In 2001 they nominally dropped as compared to 2000 by 6%, and this was the second subsequent year of decreasing expenditures.

To assess the adaptability of the Polish society to the changing labour market situation it is also important to examine **the adjustment to changes resulting from the development of modern technologies and construction of information society.**

According to data provided by Central Statistical Office, in the year 2000 only about 1.6% of active enterprises (approximately 30,000) were introducing innovations. In 2000 resources designated for innovations in enterprises, including R&D, decreased in comparison to the previous years, ending the positive trends observed in preceding years. The share of innovative companies in industry accounted for 17% (in Portugal 26% and in Ireland 74%).

Information and communication technology, including the use of the internet, plays an increasingly important role in creating competitive advantage and in positioning the company on the market. Use of e-commerce instruments and business methods; however, it is not popular among Polish SME's. Although 48% of SME's has access to Internet, very few of them use it for business purposes. In the EU 45% of SME's carried out business through e-commerce, while in Poland only 17%. Apart from the high costs of programming and internet connections this reluctance to use new technologies was caused by insufficient knowledge about the opportunities provided by the internet and opinion about its low usefulness.

A positive phenomenon is the relatively high percentage of industrial entities employing more than 49 persons, which have access to the world-wide information network – 74.9%, which means the increase by more than 13 percentage points as compared to 2000. More than half of a total number of industrial enterprises (around 54%) with more than 49 employees had their own websites in 2001 (as compared to ca 41% in 2000).

The percentage share of persons with access to internet is decidedly lower. According to survey carried out by Taylor Nelson Sofres OBOP, an average percentage of persons with access to internet was 23% in the first half of 2002 (in the second quarter of 2001 – 20%). An average percentage of internauts (persons using internet at least once a month) was in this period 18.2%. Men more often use internet (56%) than women (44%). Due to this relatively low percentage of persons using internet, Poland belongs to a group of countries with the lowest degree of network penetration (up to 20%). To compare – Czech Republic and Estonia are in a group of countries with medium degree of network penetration (20-40%), and the group of countries with the highest degree of network penetration (above 40%) includes: USA, Ireland, South Korea, Canada, Belgium, Singapore, Taiwan and Scandinavian countries²¹.

As concerns the structure of Polish internauts by age and education, the highest percentage of users are persons with secondary education (38%) and primary education (30%), which is reflected in internauts' structure by age – the highest percentage of users are in the age group

²¹ *The world report on Internet*, July 2002, Taylor Nelson Sofres, OBOP, <http://www.obop.pl>

15-29 years (33%). For persons aged 50-59 years this percentage is only 5%. Regional differentiation, characteristic for the general labour market situation, is also noted in the number of users of internet. The lowest percentage of internauts is observed in voivodships with the highest unemployment rate – as in Zachodniopomorskie and Lubuskie voivodships - 3%, as compared with 15% in Mazowieckie voivodship²².

Hitherto activities

Since the importance of increased innovation and use of new technologies became such an important issue from the beginning of the 1990's, Poland implemented numerous initiatives and programmes aimed at enhancing human resources qualifications in this respect. These activities resulted also from the implementation of strategic documents regarding innovation policy which were adopted by the Polish government.

The main directions of this assistance concern elimination of barriers limiting the capabilities of enterprises to introduce innovations. Assistance directed to the creation of infrastructure broadening access to knowledge regarding innovation and new technologies as well as increasing mutual links between R&D and enterprises. Actions are being initiated concerning the introduction of business oriented solutions (for example regulations and tax breaks) facilitating R&D activity and transfer of technology. In a wider sense the issue involves providing assistance in education at different levels and in creating innovative attitudes among the public.

Public assistance was financed from both national funds as well as foreign funds, mainly from the EU. National public assistance was implemented at the governmental level from the budget (Committee for Academic Research, Ministry for Economy, The Polish Agency for Enterprise Development, Agency for Technology). At the non-governmental level through higher education institutions, R&D units, training and advisory centres, centres supporting the development of SME's, centres for technology transfer, technological parks, entrepreneurship incubators.

The assistance supported SME's in access to education, training and counselling services facilitating innovative activity. It should however be noted that the previous level of public financing for interventions in this area was inadequate. Future activities should focus both on education in introducing innovations, techniques and technologies as well as on integrated support in use of new and advanced technologies and facilitating co-operation between academic research institutions and business.

The co-operation till now has been unsatisfactory. This has been caused, among other factors, by the lack of activity of academic schools in promoting their research potential, lack of experience related to industry among academics and therefore their isolation from present needs of industry, and on another hand short periods of implementation imposed by industry and uneven level of awareness regarding the importance of technical and organisational innovations observed among the management of enterprises.

Among actions provided for promoting innovation, there should be mentioned actions aimed at modernisation of the Polish education system. They are aimed at the adjustment of the Polish education programmes to the needs of the knowledge-based society, growth of computerisation rate in public schools, and they are a continuation and extension of actions implemented under the programme Interclasses (projects: *Internet workshop in each gmina*

²² *Access to and using of Internet in January-June 2002*, Taylor Nelson Sofres, OBOP, <http://www.obop.pl>

and *Internet workshop in each school above the lower secondary level, Equipment of general secondary schools with Internet workshop*).

2.2.4 Equal opportunities

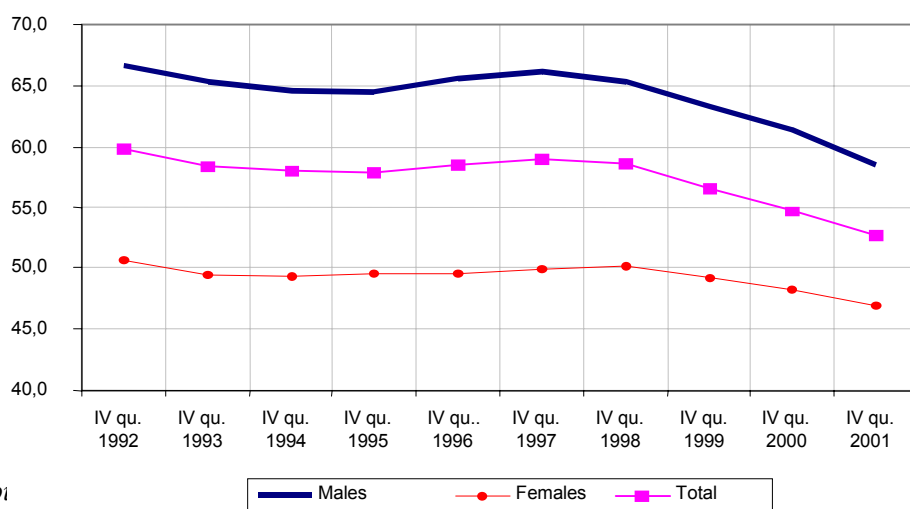
Women belong to groups especially threatened by joblessness – although the number of unemployed women is lower than that of men. However, if a woman decides to emerge on the labour market, her employment opportunities are much lower than in the case of men.

In general, women are more threatened by unemployment, especially by the long-term one. In 2002 the long-term unemployment rate for women was 10,9% against 8,6% for men.

An average time of seeking job by women in 2002 was almost two months longer than in the case of men (16,9 as compared with 15 months). Besides, if a woman finds a job, more often it is a low paid job, offering lower opportunities of vocational development.

Employment decrease, higher for men than for women, results in a slow process of bridging the gap between women and men on the labour market. In the 2002 the employment gap between women and men was about 11%. Women made up 45% of the total number of employees, and about 55% of all unemployed. This change is a result of restructuring processes, which took place in the recent years. They mainly affected large, public industrial enterprises from traditional industrial branches, dominated by men. Women find employment in low paid services' sector, also in a public sector.

Diagram 9. Employment rate by gender (in percent)



Soi

However, in spite of relative improvement of women's labour market situation, they are still in worse position than men. In the fourth quarter of 2001, 29% of men aged 15 – 64 years did not work or looked for a job, as compared with 41% of women. Particularly wide gap between women and men is visible among persons aged 25 – 44 years. A part of this gap in the value of economic inactivity rate is caused by breaks in employment connected with the child birth and child care, as well as with cultivating by a part of families of a traditional family model, where a woman is not employed. However, for older age groups the dynamics of the economic inactivity rate is higher for men than for women, which results in gradual bridging of this gap.

Women are characterised by much lower level of economic activity (58.8% as compared to 71.1% in the case of men). In the meantime, economically active women have much higher education level than men. For example, in 1998 - 1039 thous. women and 950 thous. men had higher education, post-secondary and technical and vocational secondary - 2348 thous. women and 1830 thous. men, and general secondary - 681 thous. women and 248 thous. men. Men were in majority among persons with basic vocational education as well as primary and incomplete primary education. In the first group there were 3621 thous. men (as compared to 1679 thous. women) and in the latter - 1419 thous. (as compared to 1167 thous. women). Also scholarisation rates significantly differ for women and men. In the school year 2000/2001 the gross scholarisation rate at a level of higher school for women was 50.5%, while for men - 36.9%. And men's participation in basic vocational schools was much higher – gross scholarisation rate for men was 35.1%, and for women - 18.7%. This means that sex segregation in schools is still present. This phenomenon is reflected in the preservation of division into „male” and „female” occupations and favours consolidation of labour market inequalities (in spite of higher education of women).

The table below shows however, that **irrespective of the level of education, women's salaries significantly differ from salaries of men** (with the same education), and this gap is particularly visible in the case of persons with higher and basic vocational education.

Table 9. Monthly salary according to the level of education (October 2002)

Specification	Gender		Gap in salary*
	Males	Females	

Total	2425,00	2015,79	20.3
Tertiary	4139,54	2810,38	47.3
Post-secondary	2413,58	1920,76	25.7
Vocational secondary	2309,93	1870,6	23.5
General secondary	2292,91	2011,08	14.0
Basic vocational	1774,92	1308,11	35.7
Primary and incomplete primary	1830,04	1325,77	38.0

*per cent of higher male salary as compared with female's

Source: Central Statistical Office

Women with the same qualifications and doing the same or similar jobs as men receive lower remuneration. Central Statistical Office data from October 2002 shows, that the difference is on average 20% (in 2001 22%). Among full time employees with the rank of higher officials and managers the remuneration among men was 39.2% higher than among women. Among clerical staff the difference was 1.1%, employees in personal services and shops – 18.1%, simple services – 18.2%.

The mentioned data show, that women are in relatively worse labour market situation. This refers to terms of remuneration, but also employment opportunities. It should be mentioned that in recruitment of a woman to a specific post not always her qualifications and work experience are taken into consideration. Traditional perception of the role of a man as a head of the household, supporting the family, the resulting conviction that a man should therefore have adequate remuneration, and that man's unemployment is a real material and mental problem – all this results in women's perception as employees of 'the second category'. Even statistics, as for example the number of single mothers and women being the only breadwinners in the family, do not change the stereotyped vision of social order. Even such opinions are heard that unemployment enables women to better take care of the household, children and grandchildren. These perceptions are unfavourable both for "young" and "old" women, considering their demands concerns occupational work as unjustified.

The most important factors contributing to relatively worse labour market situation of women are the following:

- a number of women, who lose job for reasons on the side of the enterprise is two times higher than the number of men. This confirms an opinion that on occasion of enterprise restructuring women are more often (or rather first of all) dismissed,
- occupational roles of women and men are perceived in a stereotypic manner. Besides, job offers notified to labour offices mostly concern occupations or jobs that are traditionally perceived as male, which reduces women's employment opportunities,
- employers are more willing to employ men than women, because the latter are considered to be less available,
- due to the long-term economic inactivity (maternity and child-care leaves, care of the disabled family member) vocational qualifications lose their value. This may result in higher for women rate of the long-term unemployment and higher percentage of women jobless for a period exceeding 12 months,
- women are in more difficult situation than men, because they still have to combine occupational work with household and family responsibilities,

- combination of family duties with occupational work (which also relates to men) is very difficult due to insufficient infrastructure of supporting facilities, and private services in this field are accessible only to persons with higher incomes,
- additionally, flexible employment forms are not sufficiently disseminated and applied by employers, who are used to traditional forms of work organisation. In result, women who usually earn less than men are forced to resign of employment.

Hitherto activities

The measures related to guaranteeing an equal status of men and women have been focused through the establishment in 2001 of the Government Plenipotentiary for the Equal Status of Women and Men within the Office of the President of Council of Ministers, whose competence is to undertake activities counteracting discrimination. These activities focus mainly on the promotional and educational area and will take form of inspiring actions for benefit of women in various environments, with a particular emphasis on the rural environment, where the situation of women may be considered the most difficult, due to traditional and stereotypical division of social roles, structural unemployment (registered and hidden), gaps in infrastructure and difficulties with access to information.

On the basis of the regulation of the Council of Ministers of 25 June 2002, the competences of the Government Plenipotentiary for the Equal Status of Women and Men have been extended to comprise the tasks related to the anti-discriminatory policy, including e.g. preparations for establishing the office for counteracting discrimination on the basis of race, ethnic origin, religion and opinion, age and sexual orientation, including development of the time framework of the works related to establishment of this office as well as development of the legal acts related to the functioning of this office. Until the office for counteracting discrimination is established, the competences of the Plenipotentiary include promotion, initiation, implementation or co-ordination of implementation of the government programmes aimed at counteracting discrimination on the above-mentioned grounds. The Plenipotentiary has appointed the Consultative-Programming Council comprised of the representatives of the organisations working for the equal status of women and men as well as experts.

In the course of implementation of its tasks the Secretariat of the Government Plenipotentiary for the Equal Status of Women and Men has developed the 2nd phase of the National Action Plan for Women, the implementation of which has been envisaged for 2003 – 2005. The National Action Plan comes as an outcome of the international obligations of Poland to apply the recommendations and conclusions included in the final documents of the 4th UN World Conference on Women – Beijing '95, i.e. The Action Platform and Beijing Declaration, which were adopted by the Government of the Republic of Poland in September 1995 without reservations and exclusions. The goal of the Plan is to implement the guidance included in these documents, which show the need to introduce promptly the changes in some areas of social life that have been considered a priority. The aim of these changes is proper understanding of women's rights, creation of conditions that are necessary for levelling up their opportunities and in consequence the improvement of their status. The programme promotes the women's rights in the reading of the documents published by the United Nations, Council of Europe, European Union as well as Organisation of Security and Co-operation in Europe.

The 1st phase of the National Action Plan for Women – until 2000, was adopted in 1997. The main goal of the programme was the promotion and protection of women's rights in the context of human rights as well as respecting the principle of equality of sexes and prohibition of discrimination in law and practice, in all areas of social life. The implementation of the National Action Plan for Women, commenced in 1997, has been slowed down in the next

years, and even suspended in some periods. The activities undertaken until 2001 were emphasising the pro-family issues and not the issue of equality, not all sectors have joined forces for its implementation, and in result it has not been fully implemented.

The strategic assumption of the 2nd phase of the Plan is complex approach to solving the problems of women. In its chapter “Economic Activity of Women”, the strategic goals of the Plan focus on: elimination of discrimination against women on the labour market, counteracting unemployment – increasing the opportunities of employment for women, development of child-care and care for dependants as the support to the economic activity of women and counteracting feminisation of poverty. Covering various spheres of social life and activities of women, this programme is addressed mainly – being the task realised by the Government – to authorities as well as central and field offices of government administration. At the same time it envisages co-operation with various subjects, i.e. the research and development institutions, non-governmental organisations, territorial self-government, central offices of trade unions and media. Taking into account the fact that *de iure* equality does not guarantee *de facto* equality, the Plan emphasises the need for developing instruments of enforcing women’s rights in the public and private sphere as well as their systematic monitoring.

At present the recommendations of the European Union resulting from the preparations for membership and related to inclusion of women and the issue of equal status of both sexes in the governmental programmes are being implemented. The transposition of equality directives into Polish legislation is taking place. In art. 18^{3b} § 3 of the Labour Code it has been stated that: „The employment of measures differentiating the legal situation of the employees due to protection of maternity does not violate the principle of equal treatment of women and men. Also the activities undertaken through a particular period aimed at levelling up the opportunities of employees of different sexes through decreasing the magnitude of the actual inequalities, in favour of the employees of one sex, in the scope specified in art. 18^{3a} § 1, do not constitute violation of this principle either.” Therefore, it is a basis for application of positive discrimination in the area of employment, however due to the fact that this is a new regulation, the information of its use in practice is still not available.

In the Polish legislation the equality of rights and the principle of non-discrimination on the basis of sex is a binding principle, what means that formally women are entitled to the same rights as men. The equal treatment of men and women is guaranteed by the Constitution of the Republic of Poland. Poland is the party to the international covenants and conventions related to the universal human rights, the unalienable and indispensable part of which are the rights of women, compiled in so called International Charter of Human Rights, as well as in the Convention on the elimination of all forms of discrimination against women of 1979. In 2003 the Sejm of the Republic of Poland has adopted the act on ratification of the Facultative Protocol to this Convention.

In order to adjust to the EU requirements, which according to the Amsterdam Treaty of 1997 considers the efforts aimed to liquidation of discrimination against women and promotion of equality between men and women to be one of the priorities, a transposition of the European Union ‘equality directives related to the labour market and employment as well as to social insurance into Polish legislation took place – mainly to the Labour Code and the law on employment and counteracting unemployment. The prohibition of discrimination, among others on grounds of sex, laid down by the Labour Code, is binding since 1 January 2002. Also the definitions of direct and indirect discrimination have been determined, the appeal procedure to the labour court against the decision that has been considered discriminatory, the principle of placing the burden of proof on the employer has been included, as well as the principle of equal pay for the same work or work of the same value.

In the *Labour Code* there is a provision impelling the observance of the principle of “equal remuneration for equal work or work of the same value”, however the system of indicators that could be helpful, while designing the remuneration policy of the companies as well as checking whether a given employer obeys this principle, has not been developed. Unless such system of indicators is not created, the evaluation of the remuneration policy of the employers towards the employees of different sexes will be subjective and prone to stereotypes. In the recently prepared *National Action Plan for Women*, in its part related to economic activity of women, the task within which such system should be established has been envisaged.

The regulations related to maternity and child care leave as well as split of these entitlements between the parents are included in the *Labour Code*. The concept of parental leave does not yet appear in these regulations, however the provisions of the *Labour Code* refer to both parents. The possibility of using the child care leave by both parents on the same conditions exists since 1996.

The popularisation of the partnership model of family, where the responsibility for the children is shared by both parents and the duties are split proportionally, using the entitlements they have, constitutes one of the tasks of the Plenipotentiary. Regardless of the above-mentioned plans, in the draft of the 2nd phase of implementation of the *National Action Plan for Women* the task of spreading the knowledge on the employee rights has been included, in particular on the entitlements related to maternity and parental issues as well as counteracting discrimination based on sex.

Therefore, there are no areas in the legislative sense, which might be considered as discriminatory. Similarly as in other countries the basic problem as far as the equal status of men and women is concerned is the discrepancy between the *de jure* status quo and *de facto* status quo.

The National Labour Inspection (PIP) have placed the issues of violation of equal treatment in employment in its plan of controls for 2003 (in 2002 the controls were conducted without taking this issue into account). The report from the controls of PIP for 2002 will be sent to Sejm in 2nd quarter of this year. Therefore, there is lack of data on observing the anti-discriminatory provisions of the labour law for 2003; we can expect them only in the 2nd quarter of 2004.

2.2.5 Persons applying for refugee status

Those whose application for granting the refugee status is under consideration by the Polish Authorities

Under the *law of 13 June 2003 on granting protection to aliens within the territory of the Republic of Poland* (Dz.U. /Journal of Laws/ of 2003, No 128, Text. 1176)²³, the refugee status in Poland is granted upon the request by the foreigner (application may cover also the spouse and minor children), who fulfils conditions defined in *the Geneva Convention* and *The New York Protocol*.

A decision on granting or refusal of refugee status is taken by the President of the Office for Repatriation and Foreigners. Such decision should be made not later than within 6 months from the date of instituting the procedure. If the application is clearly unjustified, the decision on refusal of refugee status is issued within 30 days from the date of application. The decision is subject to appeal to the Council for Refugees.

Within the period necessary for the issue of the decision on granting the refugee status, and in

²³ Before 31 August 2003 the rights and obligations of asylum seekers were governed by the *law of 25 June 1997 on foreigners*.

justified cases within 3 months after the date of issue of such decision, the foreigner has the right to benefits in a form of: place in a centre, medical care, cash assistance, assistance connected with voluntary departure from Poland.

The assistance also covers the costs of education of children taking advantage of education and care in public centres, primary schools or lower secondary schools. The foreigner also has the right to free lessons of Polish language. The rights of asylum seekers do not include the right to work. This right is acquired by the foreigner on the day of issue of a positive decision on refugee status.

In 2002 the number of applicants for granting the refugee status was 5155²⁴. Within the years 1991–2002, that is from a moment of signing the Geneva Convention by Poland to the end of 2002, refugee status was requested by 30 thous. persons.

Several centres for applicants for granting the refugee status exist in Poland (the number is flexible and depends on actual needs), with around 2000 foreigners. In 2001 an Office for Organisation of Centres for Foreigners applying for refugee status or asylum was established. The main centre, managed by the Office for Repatriation and Foreigners, where all applicants for granting the refugee status pass through, is the Centre for foreigners seeking the refugee status in Podkowa Leśna - Dębak near Warsaw, which co-operates first of all with Frontier Guards, UNHCR and non-governmental organisations. There also exist 10 similar centres in Poland, among others in Białystok, Łomża, Lublin.

The majority of applicants for granting the refugee status perceive Poland as a country of transit or temporary residence. More than a half of proceedings on granting the refugee status are discontinued due to departure of asylum seekers to other country or their disappearance. According to the Office for Repatriation and Foreigners, most of applications have economic reason and applicants do not meet the requirements of Geneva Convention. Applications for refugee status are also lodged by foreigners who came to Poland illegally and without initiation of refugee procedure would be expelled to their country of origin. It happens that persons, who illegally cross the Polish border, damage their documents and other things that might serve as a basis for confirming their country of origin. In this way they avoid re-admission.

2.3 Summary

Labour market in Poland strongly reacts to changes in macroeconomic situation. The decreasing rate of economic growth results in total employment decrease and then in the dropping employment rate, which in the fourth quarter of 2002 was the lowest since the beginning of 1990s. And the low employment rate particularly affects persons most vulnerable on the labour market.

The unfavourable economic trends have been recently accompanied by tensions resulting from demographic situation. In particular the inflow to the labour market of generations from the second post-war demographic boom is observed. At the same time, in the end of the present decade, together with de-activation of generations of the first post-war demographic boom, Poland may face challenges connected with manpower deficit.

The next side of the low employment level is extremely high unemployment and the growing phenomenon of the long-term unemployment. The average period of looking for a job is

²⁴ For comparison, between 1990 and 1999 the refugee status in Austria was granted to 10 400 persons (that is 9.1% of applicants), in Belgium it was 13 thous. persons (24.8%), in Denmark - 14 400 (72.4%), in the Netherlands - 50 700 (27.3%), and in Germany - 156 700 (7.6%). In the same period in Poland the refugee status was granted to 960 foreigners (6.7%).

extending, which strongly affects employability of unemployed persons, additionally decreasing their labour market opportunities.

Intensification of negative labour market phenomena shows geographical diversification, which is often stronger within one region than between regions. Good prospering metropolitan areas (as Warsaw) and much slower developing peripheral areas are in Poland more and more clearly distinguished.

The character of rural labour market is one of the most important barriers in development of rural areas. They are characterised by demand for low qualified manpower (higher unemployment of persons with higher education). Therefore, measures should be taken to create new jobs, in particular outside agriculture. Various analyses show that investments are attracted by regions with better infrastructure, thus the first measure to increase investment attractiveness of villages and small localities should be infrastructural investments (and pro-education measures may be considered as such to some extent). At the same time manpower supply and its quality should be influenced. Therefore the main direction of activity should be to raise the quality of human resources in rural areas and to increase youth opportunities of acquiring education adequate to the labour market needs.

In a situation of low mobility of rural population and low opportunities of its increase in the forthcoming future, it is obvious that measures aimed at the improvement of situation of rural areas residents should be applied in their particular place of residence and should focus on bridging the regional gap.

This means that employment reduction in agriculture is one of the main challenges facing Poland. Persons losing job in agriculture or industry most often find employment in SMEs sector, which function mainly in the service sector. Therefore the development of this sector may help overcome the labour market crisis.

An additional problem for the labour market policy is the low quality of human resources in Poland. The low level of skills among children of 15 years is a particularly alarming phenomenon. PISA statistics and information on graduates' situation on the labour market clearly show the low effectiveness of education system in Poland and its maladjustment to the labour market needs. Therefore, to increase competitiveness of the Polish economy, it is necessary to further increase labour productivity in order to reduce production costs and raise the quality of human resources.

The deteriorating labour market situation most strongly affects the most vulnerable people – that is youth, who have not yet acquired education so often expected by employers, and elderly people, who on transfer to the social security system usually lose their economic activity for good.

Also persons with the lowest education level are in the difficult situation and their employment opportunities are much lower than in the case of persons with higher education level. Their employability may be improved thanks to education and up-grading qualifications, as it should be expected that the labour market will more and more rarely demand the low qualified manpower.

The labour market situation of persons with disabilities is undoubtedly unfavourable. It is mainly reflected in low level of economic activity of these persons. Various factors affect this situation, starting from demographic or social and ending with the structure of this group of population by age and education. Thus, it is important to offer to persons with disabilities such measures that would strengthen their qualifications and enable them to function also on the open labour market (that is outside sheltered work establishments).

The long-term unemployed persons are gradually losing their economic activity, skills and occupational habits. They are becoming less attractive for the employers, which means that they will not find job by themselves. In effect they enter the social assistance system, which generates additional costs for the state, but first of all impedes their return to the labour market. Besides, the period of joblessness extends, presently it is more and more often 12 or even 24 months.

Due to stereotypic perception of women's roles in employment and in family relations, in critical situations for the enterprise they are first to lose the job and when unemployed have more problems with re-entering the labour market. This situation also results from the fact that breaks in employment cause „ageing” of their qualifications to a greater extent than among men. Therefore a key role should be attributed to mobilising activities, allowing women to maintain and acquire qualifications necessary for effective functioning on the labour market.

However, due to the labour market situation, which has recently dramatically deteriorated, the unemployment risk more and more often affects also persons, who have been earlier well functioning on the labour market. The long-term character of the Polish unemployment and insufficiently effective system of support for unemployed persons by public employment service increase the risk of permanent exclusion of these persons from the labour market.

The presented analysis shows that certain groups of population have much lower labour market opportunities than other groups. Variables that describe these groups are the following: age, education, health condition, gender, race and ethnic origin. However, it should be emphasised that the analysis does not present all possible vulnerable groups. In part it is due to absence of statistical data and in part to low membership of such groups. In some situations it is probably also due to the lack of knowledge on existence of some groups and on a kind of inequalities experienced by them. Therefore, the great advantage of Community Initiative EQUAL is the fact that it does not limit activities to groups covered by the analysis, but it emphasises innovative approach, also in search for groups of population that should be covered by undertaken measures.

Nevertheless, an analysis is a starting point for activities to be taken and it should indicate directions of seeking possible measures addressed to persons willing to create a Development Partnership. The analysis has quite clearly shown that features, which negatively affect the labour market situation, are often cumulated and consolidated, favouring the syndrome of the fear of social exclusion.

3. POLITICAL CONTEXT TO UNDERTAKE ACTIVITIES WITHIN THE EQUAL INITIATIVE

3.1 INTRODUCTION

It is the objective of this chapter to present the main directions of the European and national policy, which constitute a context for activities under the Community Initiative EQUAL described in chapter 6, selected for implementation in Poland.

The chapter presents the role and place of the Community Initiative EQUAL in employment and social inclusion policy, both at the European and national level. As concerns the national policy, presented information covers complementarity of the *CIP EQUAL* for other strategic national documents by indicating areas where the Community Initiative EQUAL supports implementation of objectives formulated in these documents.

This chapter also includes information on earlier pre-accession and community programmes to present their common areas with the Community Initiative EQUAL, as well as experience resulting from their implementation, which may contribute to more effective implementation of DPs under the Community Initiative EQUAL.

It should be however emphasised that both the progress in implementation of pre-accession programmes under PHARE, and Poland's participation in implementation of community programmes does not allow for full evaluation of their effectiveness and impact on the labour market situation in Poland, in particular as relates to measures in favour of the most vulnerable people

3.2 European policy context

3.2.1 European Employment Strategy

The European Employment Strategy (EES) based on the EC Treaty (chapter 8, art. 125-130) and proclaimed during the European Summit on employment in Luxemburg in November 1997, supports Member States in their mid-term activities aimed at the growth of employability, entrepreneurship, adaptability and equal opportunities of women and men. Under EES the Member States initiate activities at the national, regional and local levels according to their individual labour market needs and institutional structures. To coordinate activities taken within the framework of the EES, the Member States are encouraged to strengthen cooperation, exchange experience and innovative solutions in employment policy at the European level. The Community Initiative EQUAL is one of instruments supporting this EES recommendation.

In 2002 EES implementation was evaluated by the European Commission²⁵. Beside the positive effects of EES, as changes in approach to employment policies in Member States, appreciating the key role of social partners in defining and implementation of employment policies, the Commission has identified in its document the challenges that should be taken into consideration in the course of reorientation of the Luxembourg process. In result of the debate at all levels of European institutions on the EES future, in July 2003 new Guidelines on employment were adopted: *A European strategy for full employment and better jobs for*

²⁵ Communication from the Commission to the Council, The European Parliament, the Economic and Social Committee and the Committee of the Regions „Taking stock of five years of the European Employment Strategy”, COM (2002) 416 final, Brussels 17.07.2002

*all*²⁵. Under the new Guidelines, while developing and implementing employment policies, the Member States are obliged to adopt three overarching objectives:

- full employment;
- improving quality and productivity at work;
- strengthening social cohesion and inclusion.

The implementation of these objectives will take place through the following priorities:

- active and preventative measures for the unemployed and inactive,
- job creation and entrepreneurship,
- address change and promote adaptability and mobility in the labour market,
- promote development of human capital and lifelong learning,
- increase labour supply and promote active ageing,
- promote the integration of and combat the discrimination against people at a disadvantage in the labour market,
- make work pay through incentives to enhance work attractiveness,
- transform undeclared work into regular employment,
- address regional employment disparities.

New Guidelines also lay down the principles of ESF management and partnership in its implementation:

- the involvement of national parliaments, social partners and other relevant partners,
- effective and efficient delivery of services,
- adequate allocation of financial resources.

Taking into account the thematic scope as well as principles of EES implementation and management, the Community Initiative EQUAL is an important instrument of EES implementation. The Community Initiative EQUAL allows, inter alia thanks to the mainstreaming mechanism, for incorporation to the *National Action Plan for Employment* measures aimed at effective implementation of objectives formulated in the EES Guidelines. Besides, the supra-national co-operation and thematic networks at the European level allow to take into consideration the results of the Community Initiative EQUAL in the EES Guidelines.

3.2.2 Employment Policy Frame of Reference

The Employment Policy Frame of Reference defines the general political context and the directions of the policy oriented at employment and human resources development in Poland with the assistance of the European Union structural funds. This document shows the correlation of measures in favour of employment and human resources development with the priorities defined by the *European Employment Strategy and the Joint Inclusion*

²⁵ Council Decision of 22 July 2003 on guidelines for the employment policies of the Member States, (2003/578/EC), Official Journal of the European Union L197/13, The Employment Guidelines “A European strategy for full employment and better jobs for all”, Official Journal of the European Union L197/17

Memorandum, as well as other strategic national documents in the field of social policy and labour market, that is:

- *The National Strategy for Employment Growth and Human Resources Development in 2000-2006*, adopted by the Polish Government in 2000,
- *Socio-economic strategy: Entrepreneurship – Development - Labour*, adopted by the Polish Government in 2002,
- *The Strategy of the Social Policy for 2002-2005*, adopted by the Polish Government in 2002,
- *Directions of activities in relation to small and medium enterprises till 2002*, adopted by the Polish Government in 1999, and *Directions of activities in relation to small and medium enterprises from 2003 to 2006*, adopted by the Polish Government in 2003,
- *National Development Plan for 2004-2006*, adopted by the Polish Government in 2003 and operational programmes that implement the Plan.

3.2.3 The Joint Assessment Paper on Polish Employment Policy

The Member States, taking into consideration the Guidelines, draw up the *National Action Plans for Employment* (NAP). NAP and annual reports of the progress in their implementation are submitted to the European Commission and the Council, which has the right to formulate recommendations for employment policy of individual Member States. The Commission and the Council are obliged to draw up an annual *Joint Employment Report*.

Poland, as the candidate country, was not obliged to draw up NAP. However, at the initiative of the Ministry of Labour and Social Policy, the *National Action Plan 2000-2001* was drawn up in 2000. The process of review and appraisal of the Polish employment policy, initiated by the Polish Government and the European Commission – DG for Employment, and drawing up the *Joint Assessment Paper on the Polish Employment Policy* (a document of similar character and scope) contributed to resignation of the subsequent Action Plans before Poland acquires the EU membership.

The *Joint Assessment of Employment Priorities in Poland (JAP)* signed on 29 January 2001 by the Polish Government and the European Commission, defines basic priorities of the national employment policy, taking into consideration the objectives of the *European Employment Strategy* and the national conditions. The main JAP priorities are as follows:

- Responsiveness of education and training systems to the labour market needs,
- Labour market restructuring,
- Active labour market policy and its implementation,
- Preparation to the implementation of the European Social Fund.

The system of constant reviews allows for verification and updating of a catalogue of activities to be taken to prepare Poland for implementation of the *European Employment Strategy*. In July 2002 the Ministry of Labour and Social Policy submitted to the Commission the *Joint Assessment Paper First Progress Report*. The Report describes activities initiated in 2001 to implement JAP priorities. On the turn of December 2002 and January 2003 the *Joint Conclusions of Poland and the European Commission on the Joint Assessment Paper Progress Report* were signed. The document describes activities initiated in Poland under four JAP priorities after submission of the first report and delimits the main directions of further activities to be initiated in Poland in the forthcoming 12-14 months. In July 2003 the Ministry

of Economy, Labour and Social Policy submitted the second and the last *Joint Assessment Paper Progress Report*.

As concerns the quality of human resources and methods of activity in their development, JAP points out that in spite of its growing trend the education level of Polish employees is still relatively low. Their qualifications may be inadequate in relation to requirements of individual sectors of economy, which in future might offer additional jobs, or be insufficient in relation to the demand for increased flexibility and adaptability of employees. The document recommends continuation of the process of education reform aimed at raising the general education level and better adjustment of qualifications for the labour market requirements, as well as continuation of efforts to encourage people to undergo training, to provide higher funds for training of unemployed persons and prioritising such active measures of counteracting unemployment (including training), which lead to employability improvement.

The thematic scope of the *CIP EQUAL*, covering measures in favour of upgrading qualifications and increasing adaptability of employees to the changing labour market conditions, is compatible with the above-mentioned JAP recommendations. Besides, activities targeted at the most vulnerable groups on the labour market, both these already identified, and those which will be identified thanks to implementation of measures provided for in *CIP EQUAL*, will contribute to higher effectiveness of activities initiated to implement JAP recommendations.

JAP also formulates recommendations relating to activities aimed at eliminating gender inequalities. These recommendations among others include promotion of “family-friendly” solutions concerning conditions of job performance and systematic dissemination among women of information on their rights. One of the activities planned to be implemented under the *CIP EQUAL* is measure aimed at working out model solutions favouring reconciliation of occupational and family life as well as promotion of flexible employment forms, among others through: developing mechanisms of retaining economic activity during the break in occupational work, promotion of employee rights of women, promotion of flexible forms of employment.

JAP also emphasises the role of social partners in developing employment policy, as an element positively affecting the quality and effectiveness of general employment policy. The Community Initiative EQUAL, through the principle of partnership and the principle of projects mainstreaming (adaptation of their results to the main stream of the national policy), is a supportive instrument for activities aimed at wider participation of social partners in formulating the directions of the Polish employment policy.

3.2.4 The European Social Inclusion Strategy

In March 2000, during the European Council Lisbon Summit, the EU strategic objective for the period ending 2010 was defined: to create a world-leading knowledge-based economy, able for systematic economic growth, ensuring more jobs in conditions of increased social cohesion. The system of activities for implementation of this objective has been named the *Lisbon Strategy*.

The condition sine qua non for achieving this strategic objective is, according to the Council position adopted during the Lisbon Summit, to strengthen and coordinate activities in favour of limiting poverty and social exclusion, beside the activities aimed inter alia at strengthening the community employment policy. For this purpose the Council decided to apply an open method of coordination of social inclusion policies. Within the framework of the open

coordination process, initiated in 2001, Member States draw up bi-annual National Action Plans for Social Inclusion based on common objectives adopted during the Nice Summit in December 2000 and verified in November 2002 by the European Council. The common objectives in the field of social inclusion are the following:

- providing all with access to employment, goods and services,
- preventing the risk of social exclusion,
- support for the most vulnerable social groups,
- mobilisation of all relevant entities.

Since employment is a guarantee for prevention of social exclusion, and discrimination and inequalities are the main factors strengthening this phenomenon, the Community Initiative EQUAL, by promoting new solutions in combating labour market discrimination and inequalities, supports activities aimed at combating social exclusion within the framework of the Social Inclusion Process. For this reason the scope of individual themes, selected for implementation in Poland, encompasses the role to be played by the Community Initiative EQUAL in coping with the challenges defined in the *Joint Inclusion Memorandum*.

3.2.5 Joint Inclusion Memorandum

In Poland preparatory works are carried out to join activities carried out in favour of social inclusion at the European level. One of the stages in these preparations was development of the Joint Inclusion Memorandum (JIM), which was signed on 18 December 2003. JIM will allow for drafting the National Action Plan for Social Inclusion by July 2004. In 2002 the Minister of Labour and Social Policy established a Task Force for Social Re-Integration, composed of representatives of various institutions of self-governmental and governmental administration, representatives of NGOs, academics and experts. It is the objective of the Task Force to co-ordinate initiated actions and to ensure wide consultation (both inter-ministerial and social) before implementation of planned activities. The Task Force initiates and co-ordinates works on the preparation of the programme document *National strategy of social integration*. It is also responsible for integration of the whole policy and for ensuring joint approach to the most important problems. Its tasks also include consultations with social partners.

The most important challenges identified in JIM include:

- **threat of permanent exclusion from the labour market**
 - activation of those groups that have the lowest employment rates and persons who are long-term unemployed,
 - working out specific measures, including tailor-made services to support activation of most disadvantaged groups,
 - encouraging employers to employ and integrate workers who are threatened with exclusion,
 - building up regional and local knowledge and capacity, especially in areas of substantial downsizing of declining smokestack industries,
 - implementing active social policies to support the high-risk groups (e.g. families with many children, single-parent families, low-educated families and families providing care for persons with special needs),
 - improving targeting of existing income support systems and improving the quality of service delivery,

- supporting social employment, providing access to training or employment through complementary activities,
 - developing preventive measures (in particular, local authorities should develop programmes of support for jobless persons, so that their status does not become permanent),
 - ensuring the best mix of support for those excluded and threatened with exclusion by developing co-operation of all institutions, including employment services, social assistance and non-governmental organisations,
 - increasing efficiency of the existing solutions in the field of reconciliation of work and family life, especially in case of women and implementing new ones and equalising rights for women and men on the labour market.
- **educational disadvantage**
 - developing computer literacy and entrepreneurial skills, especially among children from underprivileged areas,
 - increasing attendance of children with particular underprivileged backgrounds in general education high schools and profiled high schools,
 - developing preventive measures to keep the drop-out rate low.
- **support for family solidarity, combating addiction, child abuse and domestic violence**
 - designing policies to support the socialisation and the care-providing functions of the family and to combat abuse and violence in families.
- **housing**
 - increasing access to adequate and affordable housing especially in urban centres.
- **access to quality services**
 - improving access to quality services with no substantial increases in public spending,
 - improving management of available resources,
 - encouraging greater third sector involvement, such as non-governmental organisations which will not merely advocate for but primarily provide needed services.
- **social services**
 - improving coordination of social assistance and labour market measures (including integration of electronic databases),
 - developing the partnership approach among local and regional authorities, NGOs, non-profit organisations, social service providers and grassroots initiatives and organisations of people threatened with social exclusion,
 - developing and implementing a methodology for evaluation of implemented policies, while the quality standards and rules for accreditation and certification are crucial to improving the level of social services,
 - implementing best practices through exchange of information and development of information databases on ongoing programmes and activities.
- **health care**
 - increasing access to health care services.
- **transport**

- increasing access to adequate and affordable transport in particular for persons with disabilities and residents of rural areas,
 - developing measures providing access to transport by students, training participants, etc. may facilitate their future mobility in the labour market.
- **policy integration**
 - integrating policies at both the design and implementation stages in the field of combating poverty and social exclusion on the part of many central and local government agencies, as well as territorial self-governments.
- **restoration of areas of multiple deprivation**
 - developing the right mix of policies to provide social protection for the affected workers and their families, effective activation measures and alternative jobs in the regions of Poland (Silesia, Łódź, coastal areas) with a heavy concentration of declining industries and post-State-owner-farm areas.

The scope of activities within the framework of EQUAL will be coherent with challenges formulated in the JIM.

Bridging the education gap and increasing participation in information society is an answer to such challenges put in JIM as building up regional and local knowledge and capacity. It proves necessary both to increase their access to information on employment opportunities (including self-employment, entrepreneurship development), and to raise their qualifications with the use of most modern information techniques (ICT training, service development via Internet). In this aspect is also important to raise the awareness of necessity of eliminating barriers in taking advantage of modern technologies and services. **Promotion of vocational inclusion** with the use of most modern communication and information techniques under EQUAL will contribute to reducing the risk of social exclusion and widening gap between human resources in economically developed and underdeveloped regions. Focusing **the activities** within the framework of EQUAL **on rural areas** and areas subject to **restructuring** meet the JIM challenge relating to restoration of areas of multiple deprivation.

The activation of those groups that have the lowest employment rates and persons who are long-term unemployed is another such challenge. EQUAL brings added value not only in working out the mechanism of effective vocational mobilisation but also in **identification of the groups most threatened with social exclusion and identification of the barriers they face in finding employment**.

The EQUAL activities aimed at working out different means of approaching the most difficult clients, including **adjustment of the services to the needs** of these groups constitute the answer to another challenge identified in JIM: working out specific measures, including tailor made services to support activation of most disadvantaged groups.

Another recommendation resulting from JIM is to increase efficiency of the existing solutions in the field of **reconciliation of work and family life** and implementing new ones and equalising rights for women and men on the labour market. EQUAL will contribute to coping with this challenge by elaboration of innovative solutions in this field.

Beside offering support for groups at risk of labour market exclusion, the role to be played by EQUAL is also to **develop partnership approach** among all key actors involved in

counteracting social exclusion by taking advantage of the idea of Development Partnership. The co-operation of all important institutions, testing new integrated services, dissemination of good practices and participation of policy makers at various level will contribute to the development of coherent policy in this field, both at the local, regional and national level.

3.2.6 Measures within art. 13 of the European Community Treaty

Actions to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation, carried out under art. 13 of the EC Treaty, constitute an important context for actions under Community Initiative EQUAL.

Under art. 13 of the EC Treaty, the Council adopted:

Council Directive 2000/43/EC of 29 June 2000 implementing the principle of equal treatment between persons irrespective of racial or ethnic origin (O.J. L 180 of 19.07.2000, p. 22),

Council Directive 2000/78/EC of 27 November 2000 establishing a general framework for equal treatment in employment and occupation (O.J. L 303 of 2.12.2002, p. 16).

The directives impose on the Member States an obligation of introducing instruments that would ensure observance of equal treatment principle. This obligation inter alia includes the designation of bodies responsible for observance of equal treatment principle and imposing the sanction for its infringement. The directives apply both to public and private sector entities.

As concerns application of both directives in labour-related area, the principle of equal treatment concerns such issues as: access to employment, running own business, vocational advancement, vocational guidance and training, associating in employees' and employers' organizations. The directives introduce a definition of direct and indirect discrimination, taking into account the above-mentioned factors and provide for special (positive) measures to prevent or eliminate inequalities resulting from discrimination.

In the case of both directives an important role is also played by protection against discrimination on grounds of sex, combined with discriminatory factors determined in the mentioned directives. And the instruments of protection against sex discrimination, including harassment and social harassment in the place of work have been standardized in Directive 2002/73/EC of the European Parliament and of the Council of 23 September 2002 amending Council Directive 76/207/EEC on the implementation of the principle of equal treatment for men and women as regards access to employment, vocational training and promotion, and working conditions. This directive refers to the principle of equal pay for men and women established by Article 141 of the Treaty and Council Directive 75/117/EEC, as a principal part of *acquis communautaire* in the field of sex discrimination. Besides, it defines as sex discrimination any unfavourable treatment of women related to pregnancy or maternity in the meaning of Council Directive 92/85/EEC.

The Community Initiative EQUAL supports activities aimed at development of effective mechanisms of combating any forms of labour market discrimination and inequality, thus supporting effective implementation of anti-discrimination instruments in Member States.

3.2.7 Common Asylum Policy

The European Council in Tampere in 1999 in its conclusions gave comprehensive guidelines on a common European Union immigration and asylum policy. There have been identified four goals of such policy: partnership with countries of origin, a common European asylum policy, fair treatment of third country nationals and the management of migration flows.

In November 2000, the Commission issued a Communication on immigration policy indicating how it intended to translate Tampere guidelines into concrete action. The next important policy paper, which takes account of relevant developments since Tampere is the Commission Communication on Immigration, Integration and Employment published in June 2003. A major development was the launching of the Lisbon Strategy in March 2000, when the Union set itself a new goal for the next decade. The contribution of legally admitted immigrants to Lisbon objectives, the aspect of their integration is even more important today when the demographic changes (especially the aspect of demographic ageing) become more significant. Access to the EU employment market for immigrants and refugees contributes to the success of the Lisbon strategy in a general sense.

The Communication formulates the EU policy instruments underpinning integration, employment and social cohesion:

- In the field of employment the key role plays the European Employment Strategy, where the integration of disadvantaged groups, including migrant workers and ethnic minorities, as well as combating discrimination have been key features of the employment guidelines;
- In the field of social inclusion the common objectives to combat social exclusion and poverty agreed by the Nice European Council are translated into national action plans against poverty and social exclusion;
- Cooperation among the member states and the exchange of information on migration is the subject of introduced by the Commission consultative meetings and discussion fora on migration issues in the EU;
- Direct or indirect support for the integration of immigrants from the EU financial instruments and other initiatives – mostly structural funds, in particular the European Social Fund . **The special emphasis is put on the Equal Initiative which supports integration through the development of innovative actions, networks and exchange of experience;**
- Support from the European Refugee Fund established by the Council for the preparation of a common European policy on asylum;

Within the number of legislative instruments in the field of asylum policy the special role in context of EQUAL implementation plays **the Council Directive laying down minimum standards for the reception of asylum seekers.**

The purpose of this Directive is to lay down minimum standards and comparable living conditions for the reception of asylum seekers in all Member States. The harmonisation of conditions for the reception of asylum seekers should help to limit the secondary movements of asylum seekers influenced by the variety of conditions for their reception.

The Council Directive 2003/9/EC laying down minimum standards for the reception of asylum seekers was transposed into national law within *the law of 13 June 2003 on protection of foreigners at the territory of the republic of Poland.*

3.3 National policy context

3.3.1 National Development Plan (NDP) for 2004-2006

National Development Plan defines the most important structural activities that Poland, as a EU Member, intends to initiate in 2004-2006 with Community financial support, to ensure conditions favouring long-term economic growth and raising the living standards of the population. This document combines horizontal, sectoral and regional solutions at the national level, indicating the directions of the socio-economic development of Poland. The strategic objective of the *National Development Plan* (NDP) is to develop a competitive economy

based on knowledge and entrepreneurship, able for long-term, harmonised development, to ensure employment growth and improvement of social, economic and spatial cohesion with the European Union at the regional and national level.

The strategic objective of the NDP will be implemented through:

- measures aimed at achieving and maintaining in longer term the high GDP growth,
- increasing the employment and education level,
- joining by Poland of the European networks of transport and information infrastructure,
- intensification of the process of increasing the share of high-added-value sectors in the structure of economy,
- supporting the participation of all regions and social groups in Poland in developmental and modernisation processes.

The most important NDP operational programme in the field of human resources development is *Sectoral Operational Programme Human Resources Development 2004 – 2006* (SOP HRD). Its main objective is to build an open, knowledge-based society by providing conditions for human resources development through education, training and work. The general objective will be implemented through the specific objectives, reflecting the priorities of the *European Employment Strategy*: employability, supporting entrepreneurship, development of staff for economy, active measures to promote labour market equality, leading to labour market flexibility and occupational mobility. SOP HRD provides for the implementation of two priorities:

- **active labour market and vocational and social inclusion policy through:**
 - development and modernisation of labour market measures and institutions,
 - perspectives for youth,
 - counter-acting and combating long-term unemployment,
 - vocational and social integration of the disabled,
 - promotion of active social policy by supporting professional and social inclusion of high risk groups,
 - vocational integration and re-integration of women.

- **development of a knowledge-based society through:**
 - increasing access to education – promotion of lifelong learning,
 - improving education quality and relevance to the labour market needs,
 - development of staff for modern economy.

Activities in favour of human resources development will be also carried out under one of the priorities of Integrated Regional Operational Programme (IROP) – *Strengthening the human resources development in regions*, co-financed from the European Social Fund (ESF). The implementation of this priority will take place through:

development of competencies linked to the regional labour market needs and lifelong learning opportunities,

equalising educational opportunities through scholarship programmes:

vocational re-orientation of persons leaving agriculture,

vocational re-orientation of persons affected by restructuring processes,

promotion of entrepreneurship,

regional innovative strategies and transfer of knowledge.

Taking into account the importance of activities carried out within the framework of NDP operational programmes as well as the necessity of ensuring the complementary character of the Community Initiative EQUAL in relation to the main programmes of the *European Social Fund*, Chapter 5 presents the detailed information on links between the *CIP EQUAL* and NDP operational programmes, with particular attention paid to areas, where the Community Initiative EQUAL brings added value to measures under the main ESF programmes.

3.3.2 The National Strategy for Employment Growth and Human Resources Development for 2000-2006

The National Strategy for Employment Growth and Human Resources Development is one of six fragmentary strategies, constituting a basis for the National Development Plan for 2004-2006. The main objective of the Strategy is to achieve maximum involvement of people in the labour process. The Strategy, based on four pillars of the European Employment Strategy, delimits directions of actions to be taken to cope with the labour market challenges. The Strategy emphasises the need for enhancement of human resources quality as a condition for finding and keeping employment. This enhancement will be implemented through the reform of the youth education system, development of lifelong education and development of qualifications of the unemployed. The labour market policy formulated in the Strategy is implemented with the support of national funds and within the framework of NDP operational programmes, co-financed by structural funds.

The Community Initiative EQUAL in Poland complements, by testing and promoting innovative solutions aimed at combating labour market discrimination and inequalities, measures aimed at the implementation of the following objectives of the *Strategy*:

- **enhancement of human resources quality by means of:**
 - development of education system corresponding to the labour market needs,
 - strengthening the system of education and rearing of socially unadjusted youth,
 - strengthening the lifelong learning of adults,
 - development of preventive activities addressed to unemployed persons and persons threatened by unemployment,
 - promoting the labour market programmes favouring qualifications' increase,
 - improvement of the system of labour market forecasts,
 - development of the institutional capacity to service the labour market.

The complementary character of the Community Initiative EQUAL in implementation of this objective of the *Strategy* in particular consists in working out and testing effective mechanisms of vocational mobilisation and raising the qualifications of the most vulnerable groups on the labour market, including persons not covered by standard labour market instruments or persons for whom application of such forms of vocational mobilisation and raising qualifications is ineffective. Thanks to thematic approach to problems connected with vocational mobilisation and raising qualifications of the most vulnerable groups, the added value of the Community Initiative EQUAL is the development of complex approach to the problem of labour market inequality, in particular in rural and restructured regions.

Actions implemented under the Community Initiative EQUAL will also contribute to strengthen the institutional labour market services by working out effective methods of coordination of institutions dealing with social and vocational inclusion of the most vulnerable social groups, working out new structures and systems of support for these persons, as well as actions aimed at raising qualifications of employees of these institutions in

the work with those people. Besides, the Community Initiative EQUAL will contribute not only to widening the offer and raising the effectiveness of public employment services, but also will be the basis for wider than earlier participation of non-public labour market institutions in activities aimed at elimination of inequalities and combating labour market discrimination.

- **entrepreneurship development through:**
 - improvement of the tax system,
 - liquidation of administrative barriers,
 - dissemination of modern technologies,
 - development of economic counselling services,
 - promoting the development of investment funds,
 - youth education in the field of entrepreneurship,
 - support for development of regional and local institutions acting in the field of entrepreneurship.

Since issues connected with entrepreneurship development are considered as priority both in earlier programmes within the framework of the national policy and in actions of the main ESF programmes, in particular IROP, actions under the Community Initiative EQUAL focus on definition of the role and tasks of the social economy in the process of vocational and social mobilisation of groups at risk of social exclusion and in the process of revitalisation of local labour markets and development of rural areas. The objective of the Community Initiative EQUAL is not only to work out the development of the Polish model of social economy, but also to develop this sector, inter alia by working out model solutions in the field of building the potential of social enterprises.

Besides, within the framework of positive actions in favour of equal opportunities of women and men the Community Initiative EQUAL will complement actions in favour of entrepreneurship development by examining the efficiency of hitherto activities in favour of women entrepreneurship as well as by working out systems of incentives to start business by women in the field of services using modern technologies.

The thematic scope of the Community Initiative EQUAL also covers activities aimed at dissemination of modern technologies, both through working out mechanisms of ensuring the participation of the most vulnerable groups on the labour market in the development of information society, as well as by activities aimed at facilitating and supporting introduction of new technologies to increase adaptability of enterprises and employees

- **improvement of adaptability of enterprises and their employees to the changing market conditions through:**
 - enhancement of employment flexibility,
 - labour costs reduction,
 - improvement of the mechanism of fixing minimum wage,
 - improvement of regulations governing employment relationships,
 - increasing motivation for starting employment,
 - introduction of social insurance in respect of unemployment,
 - providing for a modern formula of social dialogue,
 - increasing geographical mobility of people,
 - improvement of a system of programming labour demand.

Apart from actions aimed at increasing adaptability of enterprises and their employees to changes caused by the development of new communication and information technologies, the Community Initiative EQUAL also supports the implementation of objectives of the *Strategy* referring to increased flexibility of employment relationships. Flexible forms of employment

and work organisation will be one of the instruments of vocational mobilisation of groups most threatened by marginalization, tested within the framework of the Community Initiative EQUAL, as a factor of adjusting vocational mobilisation methods to the needs of these groups on the one hand and to the labour market requirements on the other hand.

Within the framework of actions in favour of increasing adaptability of enterprises and their employees, the priority will be given to actions aimed at increasing adaptability of employees threatened by the loss of job due to inequalities resulting from the development of information society and discriminatory factors, such as age, sex, health condition.

- **ensuring equal opportunities through:**
 - conducting activities enhancing the employability of persons with disabilities,
 - removing barriers and discrimination practices towards women,
 - conducting pro-employment activities for people resident in rural area.

The added value of the Community Initiative EQUAL also in the field of equal opportunities is the thematic approach to problems resulting from labour market inequalities and discrimination. Therefore, actions carried out within the framework of the Community Initiative EQUAL are not only limited to the above-mentioned groups. The objective of DPs implemented under EQUAL is to test innovative solutions for common problems of disadvantaged groups, including persons with disabilities, women or persons resident in rural areas. It gives an opportunity of working out the complex approach to the solution of problems connected with labour market discrimination and inequalities.

However, it should be mentioned that within the framework of the Community Initiative EQUAL there will be implemented the positive actions in favour of equal opportunities of women and men to work out mechanisms of reconciliation of occupational and family life, of liquidation of barriers hampering or impeding economic activity, of preventing vocational segregation. An important element of EQUAL, bringing an added value to positive actions in favour of women, is working out mechanisms of maintaining economic activity during the break resulting from the necessity of taking care of dependants and working out methods of preventing women's activity in the „grey sphere”.

3.3.3. The Strategy of the Social Policy 2002-2005

It is a strategic objective of the government in the field of social policy, defined in the Strategy of the Social Policy for 2002 - 2005 to: create institutional, organisational and financial forms of promoting employment growth, improve social safety of citizens and counteract social exclusion through the creation of stable bases for the functioning of the social security system, in a situation of civil dialogue and co-operation of all social partners.

The strategic objective of the governmental social policy will be implemented in five basic areas:

- employment growth and labour protection policy,
- finalisation of the social insurance reform,
- development of the social security system,
- modern formula of social dialogue,
- achieving European social standards and preparation of Poland for effective absorption of European Social Fund resources.

The Community Initiative EQUAL in Poland will support implementation of objectives defined in the *Strategy* in the sphere connected with activities in favour of employment growth and labour protection, in particular by complementing activities defined in the *Strategy* aimed at:

- reform in the field of labour market access and labour law,
- coordination of active labour market policy with restructuring of selected sectors of economy,
- vocational mobilisation of graduates and youth entering the labour market,
- development of lifelong learning among employees and unemployed persons.

3.3.4 The socio-economic strategy of the government: Entrepreneurship – Development - Labour

The Strategy, adopted by the Government of the Republic of Poland in 2002, formulates four strategic objectives:

- gradual restoration, over 2 years, of 5-percent GDP growth,
- occupational revitalisation of the society and increase in employment,
- effective absorption of European funds and using them for the country's development.

The *Strategy* indicates an urgent need to invest in increasing the level of education and development of lifelong learning and in knowledge-based economy. It is of utmost importance taking into consideration civilisation backwardness of Poland. Human resources development actions include both modernisation of the system of education and extension of the training offered by labour offices..

School graduates are a special group to which actions under the *Strategy* are addressed. An example of such actions is the earlier mentioned *Governmental Programme of Vocational Mobilisation of Graduates „First Job”*. The *Social and Economic Strategy* provides for parallel actions addressed to former employees of restructured businesses and sectors, in particular to inhabitants of rural areas and areas of former state-owned farms.

The thematic scope of the Community Initiative EQUAL in Poland, which inter alia covers elimination of inequalities resulting from the low level of qualifications and lack of skills resulting from the development of modern communication and information technologies, is an essential element of support for the implementation of the above-mentioned objectives of the *Strategy*. Testing innovative solutions within the framework of the Community Initiative EQUAL will also contribute to enlarge the offer of labour offices' services, in particular as concerns the most vulnerable groups. It was reflected in focusing the actions of the Community Initiative EQUAL on rural and restructured areas.

The Community Initiative EQUAL is also one of instruments supporting the implementation of priorities defined in *the Plan of Action* of the newly created Ministry of Economy, Labour and Social Policy, adopted by the Minister of Economy, Labour and Social Policy in April 2003. The *Action Plan* focuses on the following priorities:

- counteracting social exclusion and poverty,
- employment promotion,
- preparation for utilisation of structural funds,
- economic growth.

The Action Plan of the Ministry of Economy, Labour and Social Policy forms a part of wider socio-economic programme of the Government - “Entrepreneurship-Development-Work II”, adopted in June 2003.

3.3.5 Employment policy

Poland faces the need to regulate phenomena and processes that will take place in the next years on the Polish labour market. Therefore, the new *law on employment promotion and labour market institutions* will be implemented in 2004 to replace the existing law on employment and counteracting unemployment. Basic objectives and assumptions of planned labour market reform will concentrate on improving the functioning of the public employment services system and adjusting it to more effective and complex resolving of social problems in Poland, such as unemployment, poverty or social exclusion.

The draft law sets up the State's responsibilities on employment promotion, mitigation of unemployment and vocational mobilisation, and defines a notion of labour market institutions assigned to implementation of the respective activities indicated by the law. Moreover, it recognises the *National Action Plan for Employment* inspired by the *European Employment Strategy* as a foundation for labour market policy implementation.

The law presents such modification of the functioning of the public employment services to give them the capacity to solve social problems requiring state intervention in coherent and effective way. New mechanisms and institutions to co-ordinate the work of the Minister of Labour, the Marshals (voivodship labour offices) and the Starosts (poviat labour offices) will be introduced. Standards of professional qualifications of Public Employment Services (PES) employees will be established, so that they will be obliged to present themselves with relevant qualifications, which acquisition and development methods will be determined. It refers especially to the key professions within the PES. Moreover, the minister in charge of labour issues will co-operate with the minister responsible for education in developing a coherent system of education and vocational training for social workers, job-brokers, job counsellors, counsellors for the disability issues both at universities and in the existing Social Service Schools, what will enable integration of social services as well.

Labour market instruments will be aimed at employment promotion instead of alleviating the effects of unemployment by the means of human resource development and improving the system of life-long learning. The catalogue of labour market instruments will be arranged and completed and the changes will concentrate on: improving the system of vocational guidance and job placement, as well as implementing mechanism focusing on increasing the employees' and the unemployed persons' participation in lifelong learning.

According to the law, preventive measures such as service of unemployment benefits, anticipatory old-age benefits, family allowances for unemployed, or health insurance will be taken over by other institutions, replacing the system of PES.

The act introduces changes to the structure of tasks ascribed to different entities of the employment services system. Many of those tasks result from the necessity to implement the European Social Fund and EURES programmes as well as to co-ordinate lifelong learning programmes. Gmina will become a partner for implementation of pro-employment measures.

The Labour Training Fund will be established, as an instrument to encourage employers to invest in the development of professional qualifications of their employees. In order to receive support from the public funds, a training fund will have to be established. The possibility to receive new qualifications by the employees contributes to maintaining work places, therefore, it serves as an integral element of employment promotion.

Planned changes to a large extent refer to unemployment benefits. The unemployed will be able to undertake work to a limited extent keeping the right to receive a part of the benefit, i.e. compensation benefit. In a result, the unemployed will be inclined to seek a job more intensively by the new conditions.

Labour offices will be deprived of all activities connected with social security, including pre-retirement allowances payments. Therefore, the responsibilities in that field will be taken over by the Social Insurance Institution. Such solution will let the labour offices concentrate on active forms of counteracting unemployment.

Apart from solutions aimed at the improvement of hitherto forms of active labour market policy, there should be mentioned new solutions, in particular instruments supporting labour market services, as supporting mobility, rotation social housing for job seekers and persons changing their place of residence, refund of the costs of child care and dependants' care facilities.

The new law aims also at active participation of social partners in implementing measures in favour of employment promotion and improving the functioning effectiveness of labour market institutions. Apart from the activities aimed at improving the employability, also the equal access of various social groups to the labour market is of importance.

One of the basic labour law principles, defined in the *Labour Code*, is the prohibition of discrimination in labour relations on grounds of age, disability, race, nationality, beliefs, in particular political opinions and religion, as well as trade union membership.

The equal access to the labour market is also one of the principles for the realisation of the tasks in the vocational integration on the basis of the provisions of the law on employment and counteracting unemployment and on the basis of the new law, in which the rules for job placement were in particular emphasised, i.e.:

- availability of the service for all persons seeking job as well as for the employers,
- voluntary access, that means free from obligation use of the job placement services by the persons searching employment,
- equality, which means the obligation of the poviats labour offices to assist all persons searching employment in finding jobs, regardless of their nationality, political affiliation, sex, belief and other circumstances,
- transparency, meaning that all vacancies reported to the office are announced to the people searching employment.

Equal access to labour market services is also provided through the increase in the range of entities authorised to provide such services. In accordance with the *law on employment and counteracting unemployment* and the draft of *Law on Employment Promotion and Labour Market Instruments*, job placement services may be provided also by employment agencies, which carry out economic or statutory activities, after their registration. The register of employment agencies is held by a minister competent for labour issues. One of the principles to be followed by employment agencies in job placement is a principle of non-discrimination in respect of sex, age, disability, origin, beliefs of job seekers or persons seeking other gainful work. principle of non-discrimination in respect of sex, age, disability, origin, beliefs, defined in art. 19 paragraph 6 a of *the draft of law on employment promotion and labour market instruments*.

Among entities authorised to provide job placement services we should mention temporary work agencies, institutions that have been introduced to the Polish legal order on a basis of the amended law on employment and counteracting unemployment of 20 December 2002. The amended law on employment and counteracting unemployment defines the principles of creation and functioning of temporary work agencies. And the legal status of a temporary worker has been defined in *the law on temporary employment*. The law is one of the instruments for implementation of the objective of the socio-economic strategy of the

government: *Entrepreneurship – Development – Labour*: introducing flexible employment forms. Introduction of this form of employment will contribute not only to unemployment reduction and limiting “grey sphere”, but also to increase the attractiveness of an offer of the Polish labour market for foreign investors through the possibility of more rational and flexible employment in companies.

The act is supposed to come into force in the first quarter of 2004; however, with regard to some articles the *vacatio legis* rule will be applied. A detailed schedule of the labour market reform implementation will be prepared after the act is adopted by the Parliament.

Community Initiative EQUAL will contribute to achieve the objectives defined within the framework of the new law by testing new approaches to improve training and vocational guidance for the most disadvantaged groups and to tailor mainstream services to their needs as well as by promoting the mechanisms aimed at radical increase in the participation of employees and the unemployed in lifelong learning.

3.3.6 Education policy

Beside the employment and social inclusion policies, the education policy is an important context for activities undertaken under Community Initiative EQUAL.

In the Outline of Educational Strategy, drawn up by the Ministry of National Education and Sports in July 2003, it was considered necessary to continue activities aimed at the improvement of access to education and raising the quality of education. Equal access to education and raising the quality of education also form the objectives of the education system reform, initiated in 1999.

The Community Initiative EQUAL will support, by developing mechanisms of increasing adult participation in the lifelong learning, with particular attention paid to issues connected with their participation in the information society, the implementation of the following objectives defined in the *Outline of Education Strategy*:

- development of lifelong learning for adults, including distance learning.
- developing pupils’ employability, and in particular development of innovative curricula of vocational education,
- better utilisation of ICT in the process of education,

Also the State Strategy for Youth for 2003-2012, drawn up in the Ministry of National Education and Sports, defines the strategic objectives of the state educational policy in the field of equalisation of development opportunities of the young generation. The Community Initiative EQUAL will play an important role in measures in favour of increasing youth employability, defined in the *Strategy*, and in particular measures aimed at developing, in co-operation with NGOs, including youth organisations, the programmes of counteracting youth unemployment, taking into consideration their different situations (pupils, school graduates, rural youth, youth with disabilities, youth from neglected regions and poor environments, youth outside the education system and work). The added value of the Community Initiative EQUAL will be here not only the partnership approach in solving labour market problems of youth, but also the fact of taking youth problems into consideration in measures aimed at working out the complex approach to problems connected with labour market discrimination and inequalities, arising in rural areas, areas subject to restructuring and in environments particularly threatened by social exclusion.

Development of lifelong learning is of crucial importance for actions carried out to eliminate inequalities in access to labour market. The *Strategy of Lifelong Learning Development by*

2010, drawn up by the Ministry of National Education in July 2003, has defined the directions of development of lifelong learning in the context of an idea of learning throughout the whole life span and construction of knowledge-based society. Tasks formulated in the Strategy will be implemented under six priorities:

- increased access to lifelong learning,
- improved quality of lifelong learning,,
- co-operation and partnership,
- increase in investments in human resources,
- creation of information resources in the field of lifelong learning, and development of counselling services,
- information of the role and importance of lifelong learning,

The Strategy formulates tasks for the governmental and self-governmental administration, for research and education institutions and for social partners. Participation of all these entities in implementation of the Strategy may contribute to the creation of sectoral programmes of lifelong learning.

Bridging the gap in labour market access and in keeping employment, which results from the low level of education and qualifications, is one of the key elements of the Community Initiative EQUAL in Poland. Therefore the objectives formulated in the *Strategy of Lifelong Learning Development* constitute a context for measures aimed at lifelong learning development under the Community Initiative EQUAL. The added value of the Community Initiative EQUAL is its focus on the most vulnerable labour market groups, also taking into account participation in lifelong learning, development of mechanisms motivating to lifelong learning, as well as participation in drawing up branch lifelong learning programmes.

3.3.7 Innovation policy

The development of information society is a horizontal activity defined in the *CIP EQUAL*. Therefore the priorities of the innovation policy designate the thematic scope of EQUAL in Poland.

The strategic objective of innovation policy is to accelerate economic development, in particular growth of innovative approach of SMEs. It finds its reflection in measures of the Community Initiative EQUAL aimed at facilitation of new technologies and new management methods introduction in enterprises.

Apart from actions aimed at increasing innovative approach of enterprises, wider actions in favour of information society development are also of particular importance for the growth of competitiveness of the Polish economy. They have been defined in a document *e-Poland. Action Plan in favour of the development of information society in Poland for 2001 – 2006*, referring to the European initiative *e-Europe – An Information Society for All*. Measures under the Community Initiative EQUAL are complementary for measures planned in the above-mentioned document, focusing not only on the development of ICT education, including lifelong learning, but also on the development of occupations connected with IT application, and in particular the utilisation of these technologies for employment growth and for reducing unemployment.

The thematic scope of the Community Initiative EQUAL also complies with other priority of the document *e-Poland*, that is the development of teleinformation in rural areas, inter alia through introduction of telework as a tool enabling economic development of these areas, creation of tele-centres (multimedia centres located among others in schools or gmina cultural centres) in each gmina. The Community Initiative EQUAL supports implementation of this

goal by concentrating measures aimed at facilitating the most vulnerable social groups to participate in the development of information society.

The bridging of the IT gap between Poland and EU Members States average is the objective of the Strategy of IT development in the Republic of Poland – ePoland, drawn up in 2003 in the Ministry of Science and Information Technology. The Strategy defines the areas where - under the present social, economic and political conditions – effective projects might be implemented. The following areas have been mentioned here: universal access to contents and services made available in electronic way, offer of quality contents and services, creating conditions for their effective utilisation. The priority projects have been indicated for each of these areas. The following projects are of crucial importance for IT development in Poland within the forthcoming five years: broadband access to Internet in every school, The Gates of Poland (the integrated platform of public administration services for the information society, promotion of Poland in Internet and universal IT education. For all those projects effectiveness indicators have been created and frame action plans have been developed, with indication of responsible ministries.

Telework and IT utilisation are also an instrument of activities aimed at social and vocational integration of persons with disabilities through provision of specialist equipment to persons with dysfunctions which impede the use of traditional computer equipment, application of mechanisms encouraging to employ persons with disabilities in occupations requiring ICT qualifications, as programmes Computer for Homer, Telework).

3.4 Pre-accession and community programmes

3.4.1 Pre-accession programmes

The Phare pre-accession programmes, due to their early implementation phase or planning phase, have not been yet covered by complex assessment from the standpoint of their impact on human resources development in Poland.

3.4.1.1 Phare Socio-economic Cohesion Human Resources Development (SEC HRD)

Within the framework of pre-accession assistance in New Phare Orientation, the labour ministry participates in implementation of programmes Phare Socio-economic Cohesion Human Resources Development (SEC HRD). Within the framework of subsequent editions of Phare 2000-2003, covering years 2000-2006, carried out activities will be aimed at raising the quality both of human resources and national and regional structures responsible for employment.

Total assistance under Phare SEC HRD is planned at a level of 160,9 MEUR, of which Phare resources account for 125 MEUR (ca 75%).

Within the framework of SEC HRD, both regional and sectoral projects are implemented. The number of voivodships covered by the programme depends on its edition (5 voivodships in Phare 2000, later respectively – 16 in 2001, 13 in 2002 and 16 in 2003).

The strategic objectives of the programme have been defined by the *National Strategy of Employment Growth and Human Resources Development*, and include:

- improvement of employability,

entrepreneurship development,

enhancement of adaptability of enterprises and their employees to the changing market conditions,

strengthening the policy of equal opportunities on the labour market.

Projects implemented under Phare SEC HRD programme cover mainly training activities addressed to unemployed persons and persons with labour market problems, as well as to employees and employers of small and medium enterprises.

Generally, the following priorities implement the objectives of the programmes:

- improvement of employability – active forms of counteracting unemployment,
- counteracting social exclusion,
- lifelong learning development,
- development of staff for economy and entrepreneurship development,
- equal labour market opportunities for women and men.

The following are the main beneficiaries of national projects under Phare SEC HRD: youth, persons at risk of social exclusion, women. Within the framework of projects at the national level, also assistance will be provided to improve the quality standards of the labour market services. The main beneficiaries of Phare SEC HRD regional projects are: unemployed persons, persons threatened by unemployment, residents of rural areas, self-governments and social partners, the staff of small and medium enterprises, business start-ups. Due to some delay in the programming phase of Phare programmes implementation, the first contracts for projects implementation under the edition of Phare 2000 SEC HRD were signed in November 2002. For this reason there are no measurable results that would confirm the effectiveness of carried out activities.

One of projects implemented within the framework of programme Phare 2000 ESC HRD *Promotion of development of regional employment pacts* plays an important role from the standpoint of capacity of Polish institutions and organisations to enter into partnership cooperation under the Community Initiative EQUAL. The objective of the project, implemented in 4 voivodships (lubelskie, podkarpackie, podlaskie and warmińsko-mazurskie), is to develop partnership cooperation between organisations and institutions at powiat level in the field of identification of priorities and drawing up projects related to employment development. The implementation of the project started in November 2002, and its completion is planned for February 2004.

At the present stage of project implementation it is difficult to determine the results of the project. However, for the effective implementation of the partnership principle within the framework of Community Initiative EQUAL, an attempt at listing problems and positive effects of project implementation, noted by experts providing advisory services for local agreements, may be useful.

The following may be listed as the most problematical issues in project implementation:

- lack of cooperation skills of gmina and powiat authorities when developing employment pacts,
- lack of funding for implementation of pacts – the objective of the project is to draw up and sign regional pacts, therefore this issue is not directly connected with project implementation, but in future it may create significant implementation problems, because organisations and institutions concluding pacts do not have sufficient funds to finance their implementation,
- problems with translating declarations of cooperation into concrete activities and measurable results,
- participation in projects of persons without sufficient powers to make commitments necessary for implementation of pacts (persons representing the decision-making level of local institutions and self-governments in most cases could not fully participate in drafting pacts due to time-consuming character of this activity, although their influence upon the signing of regional pacts was still significant.

However, in many poviats examples of fruitful and effective cooperation may be found – involvement of all partners representing the local self-government, very active participation of entrepreneurs’ representatives, declarations of local banks as concerns co-financing the measures taken under the pacts. The above-mentioned problems are in most cases solved in the course of works on pacts¹¹.

3.4.1.2 Phare Project Developing programming and management capacities of the European Social Fund

The Ministry of Economy, Labour and Social Policy is furthermore engaged in implementing institutional support projects in the area of human resources development. The first of these projects – Phare 2001 *Development of Competencies in Programming and Managing the European Social Fund* project will be implemented in 2002-2004 in a twinning arrangement with the Finnish and British Ministries of Labour.

The aim of the project is to prepare the Polish administration at the central and regional levels for the management of structural funds provided by the European Social Fund (ESF). It includes actions for developing the administrative structures, and the training of the personnel, which in the future will be involved in managing ESF funds.

The project involves two components. The first component implemented in co-operation with Finland and the UK aims at the development of the central administration structures, which will be responsible for programming and managing ESF interventions. The second component will strengthen the regional and local administrations for the future implementation of ESF projects. Within this context the Polish Agency for Enterprise Development established in July 2002 the National ESF Training Centre. Most of the planned training activities will take place in 2003. Participants will include voivodship labour offices, poviat labour offices, final beneficiaries, future project promoters. The centre will start with the training of trainers in the area of project development. The training programmes will concentrate on the practical aspects of managing ESF funding, including filling out application forms, financial management, data gathering, preparing reports on project implementation and beneficiaries. The projects value is 2,58 MEUR, of which 2 MEUR comes from Phare funding.

This project will find its continuation in the Phare 2002 project *Further Development of Competencies in Programming and Managing the European Social Fund*. This project involves three components: a twinning agreement, technical assistance, and investments. The twinning covenant, signed between Poland, Finland and the UK involves the improvement of ESF programming documents (based on recommendations provided by the EC during negotiations), preparing the Department for European Social Fund Management to fulfil the functions of the Managing Authority and those related to the Paying Authority, preparing the Intermediary Institutions for fulfilling project management functions. Furthermore support will be provided in establishing an appropriate unit within the MoELSP for implementing tasks related to the Community Initiative EQUAL, and training of final beneficiaries in monitoring and control functions. The technical assistance component includes training for potential ESF project promoters. Within the investment component plans have been made to develop the MIS and to support its end users in its application. The project’s total value is 3,75 MEUR, of which 3 MEUR are Phare funds. The implementation will start in July 2003.

3.4.1.3 Phare 2003 NGOs for Sustainable Development

Project is aimed at increasing the value added of the third sector to the process of Poland’s

¹¹ see a note of the Polish Agency for Enterprise Development of December 2003

integration with the European Union through co-financing of those activities of NGOs, which may impact on Poland's efforts to attain higher EU social and economic cohesion indicators. The project will involve activities grouped under three sub-projects:

Institutional Development Grant Scheme for NGOs which is to upgrade capabilities and capacities of 30 Polish NGOs to implement or supplement government funded interventions and provide them with standardized quality services in the area of social policy;

Pilot Projects Grant Scheme for Socio-Economic Development and Partnership which aim at enhancing the quality and impact of grassroots level partnership initiatives in the area of local development though 20 pilot local development/socio-economic projects implemented. The support will be targeted at quality proposals from experienced NGOs working in partnership with other important actors at the local level for new, innovative schemes addressing issues which are not covered by the nationally and regionally programmed measures under *Phare Social and Economic Cohesion Programme* and *National Development Plan*;

Financial Support for Watchdog and Awareness Building in Sustainable Development and Environment Protection Projects which will support 100 NGO initiatives in the area of environment protection.

Total budget of the project is nearly 6 MEUR including 3 MEUR Phare, 1 MEUR Polish public financing and 2 MEUR Polish private financing. Design of sub-projects, tendering and contracting will last from January 2004 until June 2004. Contract implementation and payments should be effectuated from July 2004 until March 2006.

For EQUAL Initiative in Poland the first two sub-projects implemented in *Polish Agency for Enterprise Development* (PAED) are of significant importance. Particularly second grant scheme should contribute to effective partnership activities in areas not covered by EQUAL interventions. Identification and dissemination of best practice in this respect could help to develop EQUAL Development Partnerships. As far as the first grant scheme is concerned it should strengthen human resource and operational capacities of NGOs which could be involved in EQUAL Development Partnerships.

3.4.1.4 Phare 2002 ESF oriented co-operation and co-ordination between labour market institutions

Programme Phare 2002 *ESF oriented co-operation and co-ordination between labour market institutions* defines three main objectives: improvement of co-ordination between the public employment services, promotion of best practice concerning a more effective use of labour market instruments identified in Poland and support to local initiatives in the area of institutional services for the labour market.

The Programme has been divided into two components: "Technical Assistance" and "Grants supporting local labour initiatives". The total budget of the Programme is 2.7 MEUR, of which 1,5 MEUR has been allocated to the Component of grants supporting "local labour initiatives".

The objectives of the Component include strengthening the potential of institutions acting in order to counteract unemployment, in particular in the context of their preparation for participation in the operations of the European Social Fund. According to these terms, following initiatives shall be treated on a priority basis:

- initiatives that promote local cooperation aimed at strengthening local institutions and organizations counteracting unemployment,
- initiatives that are connected with improving the quality of services provided and/or

- the implementation of new services by the above mentioned institutions,
- initiatives that are connected with improving the qualifications of employees of the above mentioned institutions.

The grant may be used for the following:

- workshops for local leaders engaged in organizing the “local labour market initiative,
- preparation of office space and purchases of equipment,
- training for personnel of the Benefiting Institution,
- actions aimed at promoting the “local labour market initiative” covered by the project,
- development of partnership-based co-operation, including the elaboration of forms of co-operation, a joint strategy, and a detailed co-operation program.

The Component has been executed in the form of an open call for proposals, taken-up by public and non-public institutions operating on the local labour market. Call for proposal to the Component was published at the beginning of December 2003. It is planned that the maximum grant will amount to 0.1 MEUR. Allocation of grant requires at least 25% input of applying institution. Applicants may act individually or in consortium with partner organisations (local partners). Individual contract will be concluded between Applicant and the Polish Agency for Enterprise Development (PAED), that is the Contracting Authority for the Component, in February or March 2004.

Because of the fact that the submission of applications process still open, it is impossible to well predict the interactions of the Programme on the field enveloped by EQUAL, however the implementation of the Component is of the particular importance in the context of developing partnership-based co-operation between public and non-public institutions providing labour market services and strengthening institutional potential as regards the subsequent absorption of resources from the European Social Found, including the EQUAL.

3.4.2 Community programmes

3.4.2.1 Community action programme to combat discrimination (2001 to 2006)

Community action programme to combat discrimination (2001 to 2006), established by the Council Decision of 27 November 2000 (2000/750/EC) under Article 13 of the Treaty establishing the European Community, is aimed at the promotion of measures to combat direct or indirect discrimination:

- to improve the understanding of issues related to discrimination through improved knowledge of this phenomenon and through evaluation of the effectiveness of policies and practice;
- to develop the capacity to prevent and address discrimination effectively, in particular by strengthening organisations' means of action and through support for the exchange of information and good practice and networking between relevant institutions at European level (regional and local authorities, non-governmental organisations, social partners);
- to promote and disseminate the values and practices underlying the fight against discrimination, including through the use of awareness-raising campaigns.

Actions under the *Programme* cover:

- collection of statistical data, results of studies, development of indicators, the evaluation of anti-discrimination legislation,
- transnational cooperation and the promotion of networking at European level,

- awareness-raising, in particular through communications, publications, campaigns and events.

Participation in the *Programme* is open for private and public institutions involved in fight against discrimination not only from EU Member States, but also from candidate countries. For the implementation of the *Programme* in 2001-2006 a total amount of 98,4 MEUR has been designated. Poland has been participating in the programme since 2003.

3.4.2.2 The Community programme of action to combat social exclusion (2002-2006)

The programme of Community action to combat social exclusion (2002-2006), established by the Decision No 50/2002/EC of the European Parliament and of the Council of 7 December 2001 under Article 137 (2) of the Treaty establishing the European Community, is an element of strengthening the method of open coordination between Member States to combat social exclusion and poverty. The programme supports cooperation which enables the Community and the Member States to enhance the effectiveness and efficiency of policies to combat social exclusion by:

- improving the understanding of social exclusion and poverty;
- exchange of information and experience on social inclusion policies and promoting mutual learning inter alia in the context of national action plans;
- developing the capacity of actors to address social exclusion and poverty effectively, and to promote innovative approaches, in particular through networking at European level, and by promoting social dialogue at national and regional level.

The total budget of the Programme for 2002-2006 is 75 MEUR.

Depending on kinds of activities, projects are selected by means of a competition or a tender. The beneficiaries of the Programme may include both representatives of public administration, research institutions, social partners and media.

Poland joined Programme implementation after signing the *Memorandum of Understanding on joining the Community programme of action to combat social exclusion* on 27 June 2002.

3.4.2.3 Community incentive measures in the field of employment (2001-2005)

The programme - Community incentive measures in the field of employment (2001-2005), established by the Decision No 1145/2002/EC of the European Parliament and of the Council of 10 June 2002, is aimed at the implementation of Art. 129 of the Treaty establishing the European Community, which provides for the establishment of measures to encourage Member States to cooperate and support activities in the field of employment.

Actions under the Programme are aimed at accelerating the cooperation among the Member States in the field of analyses, studies and monitoring of the labour market policies, seeking the best practice, promoting information and experience exchange as well as development of contents of the *European Employment Strategy* and active information policy in this field.

Actions under the Programme focus on the following spheres:

- analyses, studies, statistical cooperation,
- exchange of experience and good practice,
- modernisation of the Public Employment Service,
- promoting local development.

Only supra-national actions are financed within the framework of the Programme. The following may be the beneficiaries of the Programme: academic and research institutions, consulting companies, social partners, non-governmental organisations, public administration at local, regional and national level.

The total budget of the Programme for 2001-2005 is 55 MEUR.

Poland has been participating in the Programme implementation since 2003 after signing the *Memorandum of Understanding on joining the Community incentive measures in the field of employment* in December 2002.

3.4.2.4 The Programme relating to the Community framework strategy on gender equality

The Programme relating to the Community framework strategy on gender equality (2001-2005), established by the Council Decision of 20 December 2000 (2001/51/EC) by virtue of Art.13 of the Treaty establishing the European Community, has as its purpose to promote gender equality, in particular by providing assistance and support for *the Community framework strategy on gender equality (2001-2005)*. The Programme has the following specific objectives:

- to promote and disseminate the values and practices underlying gender equality;
- to improve the understanding of issues related to gender equality, including direct and indirect gender discrimination and multiple discrimination against women, by evaluating the effectiveness of policies and practice through prior analysis, monitoring their implementation and assessing their effects;
- to develop the capacity of players to promote gender equality effectively, in particular through support for the exchange of information and good practice and networking at European level.

The thematic scope of the Programme is covered by intervention areas defined in *The Community framework strategy on gender equality (2001-2005)* that is: economic activity, equal participation and representation in public life, social rights, human rights, stereotypes in perception of women's role in the society.

The total budget of the Programme for 2001-2005 is 50 MEUR. Only supra-national actions are financed within the framework of the Programme. The following may be the beneficiaries of the Programme: academic and research institutions, social partners, non-governmental organisations, public administration at local, regional and national level, national statistical offices, media.

3.4.2.5 „Leonardo da Vinci” Programme (2000-2006)

The second edition of the *Community Programme „Leonardo da Vinci” (2000-2006)*, established by the Council Decision of 26 April 1999 (1999/382/EC), is aimed at improvement of quality of educational and vocational training systems, by testing innovative solutions through supra-national cooperation.

The objectives of the programme are to:

- improve the skills and competences of people, especially young people, through work-linked vocational training and apprenticeship with a view to promoting employability and facilitating vocational integration and reintegration;
- improve the quality of, and access to, continuing vocational training and the lifelong acquisition of skills and competences with a view to increasing and developing

adaptability, particularly to changes resulting from the development of technologies and management methods;

- promote and reinforce the contribution of vocational training to the process of innovation, with a view to improving competitiveness and entrepreneurship, also in view of new employment possibilities; special attention should be paid in this respect to fostering cooperation between vocational training institutions and undertakings.

The following types of projects may be implemented under the programme:

- exchanges and apprenticeships – these projects are focused on organisation of vocational training corresponding to labour market requirements;
- pilot projects – the priority is here to enhance the quality of education and vocational training as well as vocational counseling, in particular by promoting innovative teaching methods with the use of new technologies. In this type of projects, from the point of view of the Community Initiative EQUAL attention should be paid to pilot projects named thematic actions, addressing the problems, which are specially promoted by the European Union, such as projects aimed at raising the qualifications of vulnerable persons on the labour market;
- language projects – their objective is to promote language competences, and understanding of different cultures of European countries through the development of teaching methodology and procedures of examining language needs;
- transnational cooperation networks – their objective is to support the development of transnational cooperation networks as an instrument of disseminating the knowledge and experience at the European level by implementation of tasks connected with acquiring and development of knowledge on innovative solutions, improvement of analysing abilities and forecasting labour market requirements, dissemination of effects of work of the transnational networks;
- surveys and analyses – the projects focus on the development and updating of surveys and analyses concerning education and vocational training.

Access to this programme is open to institutions and organisations with legal personality (training institutions, universities, research centres, undertakings, particularly SMEs, social partners, public administration) from the Member States, EEA and countries of Central and Eastern Europe. Poland has been participating in the programme since 1998, and in the second edition of the programme 2000-2006 since 2000.

Taking into consideration the objectives of the *Leonardo da Vinci Programme*, and the attention paid to groups in an unfavourable labour market situation, to work out mechanisms to facilitate the access of these groups to training, to promote equal opportunities, in particular of women and men, as well as to fight against discrimination, the close correlation between this programme and the Community Initiative EQUAL should be emphasised.

Ensuring cohesion of activities within the framework of *Leonardo da Vinci Programme* and Community Initiative EQUAL, including the necessity of avoiding overlapping approach to the same target groups, is one of recommendations of the *Evaluation of the second phase of Leonardo da Vinci Programme*, a report drawn up by Pentor for the Ministry of National Education and Sports in August 2003. The purpose of working out this document was to evaluate the implementation and effectiveness of the programme in the years 2000-2002 and its impact on the vocational training systems and arrangements which exist in Poland.

According to the results of the evaluation published in the above-mentioned report, the majority of projects refer to the priority covering employment issues by improving the quality of vocational preparation, increasing opportunities for acquiring qualifications useful in the labour market, promoting investment in human resources (11 projects). The latter are directed at supporting educational and training activities in SMEs (4 projects). Projects promoting cooperation between vocational training providers and entrepreneurs are less numerous (3 projects). And the least numerous are projects referring to:

- bridging the gap in access to education and vocational training of the most vulnerable persons on the labour market (2 projects),
- promotion and use of information and communication technologies ICT in vocational training (2 projects),
- enhancing transparency of vocational qualifications (2 projects).

3.5 The Programme of local partnership model implementation

The Programme of local partnership model implementation may be mentioned as another example of a programme of importance for building the capacity of Polish organisations and institutions to effectively implement the high quality Development Partnership within the framework of EQUAL . The local partnership model has been developed by experts from US Labour Department in cooperation with the Worldwide Strategies Inc. Implementation of the programme was started in June 2002 (the pilot stage in 1998-2000 in śląskie and małopolskie voivodships) by the Institute for Cooperation and Local Partnership in cooperation with the Ministry of Economy, Labour and Social Policy, Marshals Administration, Association of Polish Poviats and the Worldwide Strategies Inc. Initially the programme was implemented in three voivodships (małopolskie, pomorskie and lubelskie), and since 2003 it has been implemented in subsequent four voivodships (dolnośląskie, mazowieckie, świętokrzyskie, zachodniopomorskie).

The objective of the programme is to:

- acquaint the staff of local self-government with additional instruments of developing local partnership and solving problems connected with economic boom, effective assistance for redundant employees and raising the competitiveness of enterprises;
- apply the learned methods in local community to develop partnership cooperation between inhabitants, self-government, organisations and institutions;
- set up structures which will favour the development of local partnership with the use of hitherto and new methods of activities.

Within the framework of programme implementation, regional and local partners are trained in the field of local partnership methodology and setting up the network of regional and local partnerships. By May 2002 training was completed by 139 persons, including 68 poviat and 24 regional specialists of local partnership. The second part of trainings, from June to November 2003, was attended by 81 persons from 37 poviats and 12 gminas from the area of subsequent four voivodships, included to programme implementation in 2003.

3.6 Complementarity between EQUAL and others programmes

This is the Managing Authority role to ensure compliance between EQUAL and mentioned above programmes. Some of the programmes will enrich the capacity and experience of the involved institutions (especially NGO's). Some of them will require stronger co-ordination to avoid overlapping.

The tools of co-ordination are:

on the level of EQUAL project selection:

- information provided by the applying institution in application form concerning participation in other relevant programmes;
- the Monitoring Committee represents main authorities and organisations which supervise implementation of mentioned programmes;

on the level of experience utilisation:

- invitation to the thematic networking groups project providers implementing corresponding projects under other programmes.

4. Summary – the SWOT analysis

The implementation of the Community Initiative EQUAL is a complex operation whose success is conditioned by many circumstances characterising the political and socio-economic situation of Poland. To use the categories of the SWOT analysis, which concern presentation of the weak and strong points of the human resources in Poland and the strategy to implement EQUAL, as well as the chances and threats resulted from it, one should pay attention to the following circumstances:

Internal supporting circumstances (strengths):

- determined implementation of the Governmental Economic Strategy „*Entrepreneurship-Development-Labour*”, confirmed by the political will to improve the situation in the labour market, as well as the adoption of the governmental „Programme of growth-oriented activities for 2003 – 2004” stimulating economic growth acceleration to the level of 5% of GDP growth in 2004,
- following the actions for the development of employment, defined in the year 2000 in the *National Strategy for Employment Growth and Humane Resources Development 2000-2006*, as well as JAP recommendations of July 2003,
- the experience of the Polish employment services in the practical implementation of the instruments of the labour market policy,
- proportional territorial coverage of the public / self-governmental employment services and social assistance,
- well mapped situation of the main reasons of exclusion in Poland (JIM),
- introduction into practice of the law on social employment as a legal basis for assistance for persons at risk of permanent exclusion,
- public acceptance for the measures taken to improve the situation of women, the disabled, and to allow for special treatment of the graduates in the labour market,
- experience from the implementation of the „First Job” programme aimed at supporting the occupational and life start of graduates,
- support from social partners for activities aiming to improve the situation on the labour market,
- experience in the implementation of pilot programmes for Roma society, aimed at the improvement of access to and the quality of education and job placement service,
- continuation of the reform of the education reform, whose goal is better preparation of the graduates to meet the requirements of the modern economy and increased competition on the labour market,
- a significant growth of the number of higher schools and almost four-time growth of scholarisation in the high education level,
- upgrading and development of vocational counselling in schools and institutions,
- developing private sector, which generates 61% of the GDP and employs 71% of all the employees,
- growing scale of part-time employed women,
- growing labour productivity in Poland,

- rising awareness of the employers of the importance of „human factor” in achieving economic success and the related adoption of the principles of a rational human resources policy,
- increasing awareness among entrepreneurs and employers of the importance of training for managers and staff,
- willingness of NGOs and other stakeholders to involve themselves in the activities for development of social economy.

Internal restricting circumstances (weaknesses):

- low impact of economic growth on creating employment,
- low investment level leading to low creation of new jobs,
- weakness of trade and service sector,
- high labour costs for employers,
- strong regional differentiation in the field of social-economic development (regions with very high unemployment rates include those regions with high proportion of rural population),
- limited territorial and vocational mobility of the Polish society,
- low productivity of the labour force in Poland,
- high structural unemployment and hidden unemployment together with their negative social consequences,
- large percentage of the long-term unemployed among the total of unemployed,
- continuing inequalities in the labour market as regards women and groups threatened with social exclusion,
- lack of programmes specifically targeting the strengthening of the position of women on the labour market,
- insufficient knowledge of employees in labour market institutions to deal with gender equality issues on the labour market,
- slow implementation of the law on social employment,
- ineffective solutions in the sphere of disabled persons’ employment promotion (too low employment scale, lack of access to first labour market),
- low employment rate in Poland (51,7%) that leads to not benefiting of the existing human resources,
- disadvantageous structure of employment (high employment in agriculture, too low in services),
- shortage of non-public employment institutions,
- insufficient involvement of NGOs in the development of labour market programmes ,
- outflow from the employment services of personnel with experience in the implementation of national and aid programmes,
- limited number of active measures against unemployment due to lack of funds for employment promotion ,

- overoptimistic approach to a number of measures including public works or self-employment of the unemployed,
- insufficient network of vocational guidance and counselling centres,
- inadequate equipment of the labour market institutions with IT,
- inadequate monitoring of the labour market programmes,
- lack of an integrated system for forecasting and programming regarding the scope and structure of demand for employees,
- a fragmentary nature of activities aimed at human resources development in particular in rural areas and areas subject to restructuring,
- insufficient communication between institutions and access to information on the labour market,
- lack of developed programmes for vocational restart,
- lack of employers' and employees' habit of utilising already existing flexible forms of employment and work organisation,
- lack of social infrastructure allowing to combine family functions with occupational work,
- administrative and financial barriers to business start-ups,
- poor IT infrastructure and relatively expensive access to Internet and modern ICT,
- low education levels of the society and the lack of lifelong learning habit,
- schools and university programmes not meeting labour market needs, education system under-equipped with computers and programming, existing and widening gaps in access to higher education on the part of students from rural areas and small towns,
- shortage of professional, accredited institutions providing vocational training and lifelong learning.

External supporting circumstances (opportunities):

- adoption of most European documents aiming at implementation of common European social policy and employment policies,
- drafting and implementation of a new law on employment promotion and labour market institutions, which radically changes the character of instruments applied in the labour market policy – from passive into active ones,
- drawing up legal regulations to create conditions for anti-discrimination policy and policy of equal treatment irrespective of sex, political conviction, religion, age, sexual orientation,
- drafting and pilot implementation of „Programme 50+” aimed at maintaining the employment of elderly people and at limiting their de-activation,
- political stabilisation and promotion of economic development,
- economic growth leading to growth in demand for Polish products,

- financial support in the form of Structural Funds,
- recognition of the professional qualifications gained in Poland on the territory of the EU,

- increased development of an open information society, based on knowledge,
- employment policy prioritised in European countries,
- the growing significance of employment and social inclusion policy co-ordination at EU level,
- drafting and implementation of a law on social employment to lay down a legal basis for assistance for persons at risk of permanent exclusion by their preparation for work,
- drafting and implementation of a new law on employment promotion and labour market instruments, which radically changes the character of instruments applied in the labour market policy – from passive into active ones,
- drawing up JIM to identify main reasons of exclusion in Poland, within the framework of works on social inclusion policy,
- the growing role of social economy instruments in Polish employment and social inclusion policy,
- intensification of the international co-operation and partnership in science, economy and social issues; exchange of personnel between universities and enterprises,
- facilitated access to the verified solutions and examples of good practice, related to different fields and branches of the social and employment policy,
- access to highly-developed technologies and transfer of *know-how*.

External threatening circumstances (threats):

- economic downturn that limits the demand for Polish products,
- low competitiveness of the Polish economy and enterprises as compared with the partners from the EU,
- low competitiveness and productivity of the agricultural sector in Poland,
- growth of imports substituting local production in EU countries,
- growth of prices of products and goods, leading to increased poverty levels,
- withdrawal of investments from special economic zones,
- the growing threat of civilisation gap resulting from information society development,
- barriers to introducing new forms of employment and modern work organisation,
- high youth unemployment due to demographic boom,
- the growing threat of vocational de-activation of elderly persons (the first post-war Polish demographic boom),
- increase of unemployment in regions where the restructuring of sectors of economy may lead to major lay-offs (coal mining, steel sector),
- inflow of the foreigners seeking of asylum status in Poland after enlargement,
- increase of trafficking of women and children to EU across Polish border.

5. PRINCIPLES OF EQUAL

On the basis of the experience gained from the implementation of the former Community Initiatives - ADAPT and EMPLOYMENT have been formulated the principles of EQUAL.

The guidelines for the Community Initiative EQUAL were introduced with the Communication from the Commission to the Member States. The following six principles of EQUAL were introduced in the guidelines¹².

thematic approach,

partnership approach,

empowerment,

transnational co-operation,

innovation,

mainstreaming.

The principles of EQUAL reflect the main objectives of an integrated strategy to combat discrimination and inequality experienced by those seeking access to the labour market and those already within it.

5.1 Thematic approach

The implementation of the Initiative EQUAL was from the beginning based on thematic fields where groups of Member States consider that transnational co-operation will assist them in improving ways of delivering their national policies. Taking account of the experience from the first round of EQUAL as well as revisions of the EES the main emphasis of the new guidelines¹³ has been placed on objectives, priorities and targets in order to become the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion.

On the basis of indicated areas and taking account of the current situation on the Polish and European labour market, the Working Group for EQUAL has selected priority themes. They will constitute basis for the establishment of Development Partnerships in the given areas, defining the expectations of the EQUAL MA in that respect. The strategy aiming at fighting discrimination and inequality on the labour market implemented under EQUAL tends towards:

- Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all,
- Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs,
- Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies,

¹² Communication from the Commission to the Member States establishing the guidelines for the Community Initiative EQUAL concerning transnational co-operation to promote new means of combating all forms of discrimination and inequalities in connection with the labour market; C(2000) 853; 14.04.2000,

¹³ Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions establishing the guidelines for the second round of the Community Initiative EQUAL concerning transnational co-operation to promote new means of combating all forms of discrimination and inequalities in connection with the labour market "Free movement of good ideas"; COM (2003) 840; 30.12.2003,

- Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services,
- Supporting the social and vocational integration of Asylum-Seekers.

Thematic fields will also constitute a basis for the co-operation within thematic networks and implementation of activities aimed at the dissemination of results of DPs implemented under EQUAL, as well as their mainstreaming both at the local, regional, national and Community level.

5.2 Partnership approach

Partnership, as understood in Initiative EQUAL, is defined as undertaking joint activities based on a common strategy and development of integrated approach. In such partnership individual partners should join efforts and resources to find innovative solutions for common aims and jointly agreed problems. Identification of factors leading to labour market inequality and discrimination will take place in the course of joint work of partners within the selected thematic fields. The partnership principle is a key element of the Community Initiative EQUAL.

Partnership under EQUAL will be implemented by Development Partnerships, which will bring together representatives of various stakeholders, many of whom have not previously collaborated, uniting their resources in implementation of the jointly approved strategy of counteracting inequality and discrimination on the labour market.

Development Partnerships should take into account all the representatives of institutions and organisations essential to solution of a given problem at different levels of functioning of the partnership, i.e.:

- representatives of governmental and self-governmental authorities,
- representatives of social dialogue institutions, including non-governmental organisations (NGOs), employers' and employees' organisations,
- representatives of business and entrepreneurs (in particular small and medium enterprises),
- educational institutions,
- and research and development units both on the local, regional, national and Community level

Each Development Partnership should present its strategy of implementation of its objectives, on the basis of a commonly agreed (and written) work programme, in a form of an Development Partnership Agreement, which will be the result of the first phase and consolidate the first milestones. Development Partnership should be formed exclusively for the needs of the implementation of the objectives of the Initiative EQUAL. Its structure and mode of functioning should be flexible and should allow for possibility to adjust, in result of agreement with the EQUAL MA, to the conditions that might change during the implementation of the DP. Detailed principles of establishment of Development Partnerships and the criteria of their selections will be discussed in 7.2 and 7.3.

Apart from the activities adequate for the implementation of a given project, Development Partnerships will also co-operate with other national Partnerships within the frames of thematic networks, whose aim it will be to popularise and include in the national policy the experience gathered during the implementation of the DPs under the given thematic areas.

Development Partnerships are final beneficiaries of the programme, which means that they will receive the funds coming from ESF, so they should guarantee that financial and administrative liability will be ensured and that it will be imposed on an organisation qualified for administration of public funds. In order to achieve that, all DPs will appoint a body or a partner administering the public funds. MA will provide counselling on the tasks of these bodies, and guidance on good practice in managing the public funds.

Solutions developed by Partnerships in DP implementation will be disseminated at different levels of labour market policy implementation. To ensure appropriate mainstreaming of results of EQUAL, Development Partnerships will make available their results to the general public.

Creation of effective partnership in Poland will be a challenge taking into account little experiences in partnership as described in Sections 3.4 and 3.5.

5.3 Empowerment

The principle of empowerment means involvement both of potential partners and the representatives of disadvantaged groups in all the actions undertaken with the aim of implementation of the EQUAL programme. It means that the principle of empowerment should be complied with at each stage of implementation of Initiative EQUAL, starting from programming.

Empowerment is first realised in the course of developing the main programme documents by participation of relevant stakeholders in the Working Group for EQUAL, and by social consultations carried out in the course of works on the documents.

Development Partnerships will be responsible for observation of the principle of empowerment at the stage of EQUAL DP implementation, which should provide disadvantaged groups with an opportunity to participate in DP implementation and influence the development of activities. The strategy of empowerment of the disadvantaged groups in the establishment of Development Partnerships will be one of the criteria of selection for implementation of the programme.

Empowerment is a key element in the design of DPs. It means that:

- all actors of a DP, and all participants in its activities will be given the opportunity to contribute to capacity building, to participate in common learning processes, and to take part in the decision making.
- DPs should promote the process of mobilising joint resources, the development of skills to
- actively shape one's own future, and the involvement and cooperation of all stakeholders from
- the early stage of the design of the DP strategy. In this way, the management of DPs should be
- open and transparent.

5.4 Transnational co-operation

Cooperation across Member States is a fundamental aspect of EQUAL and manifests itself at number of levels.

Each of the Development Partnerships selected is obliged to enter into cooperation with at least one Development Partnership from an other Member State.

Within the framework of transnational co-operation, each appointed party maintains contractual relation¹⁴, with respect to the issues concerning it, to its own national managing authority to which it reports. Nevertheless, the various appointed parties (transnational partners) are bound among themselves by a Transnational Cooperation Agreement which specifies the objectives and methods of co-operation. Such an Agreement, committing partners from different countries to a joint DP, exceeds the national scope of each DP and requires application of methods of management of the European level. As transnational co-operation is an integral part of the activity of the Development Partnership, the work programme cannot be completed without this element. This imposes the discipline both on the DP and on the Managing Authorities of the programmes, as the Transnational Co-operation Agreement must be approved by each Managing Authority.

In order to facilitate this process, an internet based database "EQUAL transnational co-operation internet module" (ETCIM) has been established which allows all authorities to view, update and notify their approval of the Transnational Co-operation Agreements through the internet.

Each *co-operation network* will choose for itself a name to be identified with, and will specify in its agreement on transnational co-operation:

- the dependent partners and the possible associated partners,
- the objectives pursued under the co-operation and the expected value added contributed by each partner,
- a detailed work programme (nature of the activities, budget allocated to each activity, timetable of implementation),
- the role of each of appointed parties or associated partners, or else other DPs (financial amount allocated to the co-operation, responsibilities in relation to implementation),
- the methods of joint decision-making (descriptions of the mechanisms),
- the management methods (co-ordination, secretariat),
- the mechanisms of the evaluation of co-operative efforts.

5.5 Innovation

Community Initiative EQUAL is a research platform, testing innovative approaches in relation to actually implemented programmes or functioning systems. In this context innovation under the EQUAL Initiative stands as a priority. All activities undertaken by Development Partnerships and the very structure of Partnerships should be innovative. The definition of innovation in case of the EQUAL Initiative is a result of the experience issuing from evaluation of the former community initiatives and innovations form the first round of EQUAL. It distinguishes three types of innovation:

- **process-oriented:** development of new methods, tools, a new approach, and improvement of already existing ones,
- **goal-oriented:** formulation of new objectives, identification of new approaches, opening new ways to employment,
- **context-oriented:** development of a system responding to the needs and problems of the labour market within the framework of political and institutional structures.

¹⁴ Regulations concerning relations between the Managing Authority and the appointed party must be adjusted to the specific situation of each Member State.

Innovative character in the meaning of DPs implementation under Community initiatives is not restricted only to the above presented areas.

EQUAL tests innovative approaches to policy delivery. These may be completely new approaches, or the transfer of elements from elsewhere, which increase the effectiveness of policy delivery.

Development Partnerships should demonstrate how they will apply the innovativeness principle and in what manner they will develop, test and validate models of good practice which have the potential to be approved elsewhere, and at larger scale. In addition, the innovativeness of Development Partnerships will be also examined in the context of already existing methods of support delivery in the thematic areas, the objectives of structural funds and the national policy. It will constitute one of the criteria of selection of Development Partnerships for implementation of the programme.

It is very important that Member States articulate policy demands and encourage DPs to experiment more in areas of protection against unemployment, quality of employment and direct job creation.

5.6 Mainstreaming

The purpose of mainstreaming is the integration and incorporation of new ideas and approaches into policy and practice. EQUAL, providing structures and tools to process of mainstreaming, contributes to effective policy making by finding out, what works and what does not and making sure that all key stakeholders can learn from it.

The results of EQUAL must become part of systematic approach to other policies and programmes which are carried out on a local, regional, national and European level. They must be analysed, benchmarked and disseminated in order to obtain the maximum impact within Member States and across the European Union.

To facilitate mainstreaming at all levels of implementation, the Managing Authority will establish a mainstreaming strategy, outlining objectives, mechanisms and resources, including networks. The EQUAL Monitoring Committee will take an active role in drafting this strategy. EQUAL MC will endorse it and monitor its implementation.

5.7 Gender mainstreaming

Gender mainstreaming is a tool which will be applied in the Polish EQUAL Programme to achieve equality between women and men which goes beyond promoting equality through the implementation of specific measures to help women, and mobilises all general policies and measures specifically for the purpose of achieving equality by actively and openly taking into account, at the planning stage, their possible effects on the respective situation of men and women (gender perspective). This means systematically examining measures and policies and taking into account such possible effects when defining and implementing them (COM (96)67final: Incorporating equal opportunities for women and men into all Community policies and activities).

The Polish EQUAL Programme supports both specific measures to improve women's access to and participation in the labour market, as well as gender impact assessment in order to take into account, within all measures, equal opportunities for women and men as part of the mainstreaming approach.

The Managing Authority will take steps to ensure that gender perspective and promotion of equal opportunities will be taken into consideration when planning, selecting, implementing and evaluating the DPs, as well as when the good practices will be mainstreamed. National

expertise on gender mainstreaming will provide guidance for example to DPs, the selection committee, Managing Authority, NSS and evaluators when implementing gender mainstreaming. DPs will be advised to take gender perspective into account in their work plans. In the selection process, DPs contributing to gender equality will be given priority under all themes. Gender balance will be sought in the composition of the Monitoring committee, and other supporting structures to EQUAL. Indicators used to evaluate the impact of the interventions will be split by gender. When mainstreaming the results, special attention will be paid to good practices promoting gender equality.

The meaning of the implementation of the policy of equal opportunities in the EQUAL Community Initiative Programme is twofold, understood both as a horizontal question and positive activities.

The principle of equality of women and men on the labour market as a horizontal question will be maintained during the implementation of all the priority themes. It is assumed that implementation of the principle of equal opportunities will be monitored at the level of the DPs targeted at people and the activities.

The DPs implemented under the Community Initiative EQUAL will take into account the criteria that ensure equality of opportunities on the labour market for women and men, and are meant as:

- the **share** of women and men in the target group of a given measure, at different stages of implementation: indicators of monitoring for all support areas are examined in relation to gender,
- the **implementation methods** taking into account such resources as working time, information, financial means, access to education and training, possibilities of vocational career: promotion of the DPs applying innovative institutional approach and the support-oriented programmes and inclusion of women on the labour market,
- the **social standards and values** that have impact on the policy of equal opportunities, such as female and male behaviour, stereotypes in perception of male and female roles in the family and professional life: promotion of a new social model that takes into account equal rights of women and men in the occupational and social context,
- the **laws** indirectly or directly preventing gender discrimination on the labour market: promoting activities to raise awareness of the society in the sphere of the legal aspects of equal access of women and men to the labour market.

The EQUAL Monitoring Committee will watch over proper implementation of the DPs and observance of the principle of equal opportunities. Moreover, the objective of participation of the representative of the Secretariat of the Government Plenipotentiary for Equal Status of Women and Men in the proceedings of the EQUAL MC is to guarantee compliance with the policy of equality of opportunities.

It is expected that in result of such policy the opportunities for women to find high quality jobs will improve, their access to training and updating vocational qualifications will grow and entrepreneurship will increase.

6. PROGRAMME PRIORITIES

6.1 Themes

6.1.1 Theme A: Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all

Objective

Improving the chances for employment of the groups suffering inequality related to their lack of qualifications and low education levels and skills. Supporting participation in the information society development.

Justification

The unfavorable employment situation and unequal access to the labour market in Poland have a geographic dimension and are particularly visible in rural areas and industrial areas subject to restructuring. Unemployment in these areas is mainly connected with low education levels, lack of an active approach to and mobility in seeking employment, with communication and transport barriers, as well as poor access to information. In these areas the inequalities in access to the labour market prevents participation in the European and world economy. By not knowing foreign languages and not being able to use modern ICT, residents of rural areas and redundant industrial workers are less attractive on the labour market and their employment opportunities are significantly lower. This theme focuses on adults, most of whom were educated in the old education system, who should be assisted in raising qualifications and labour market adaptability. In rural areas and industrial areas subject to restructuring, a significant share of youth in the group of unemployed persons with minimal employment opportunities is noted (among the economically active: 57% persons aged 15-19 and 49% persons aged 20-24 are unemployed). These young people have been educated in a new economic and political situation and in a new education system, which – however – has not sufficiently prepared youth from disadvantaged families to compete on the labour market.

EQUAL should focus on the most disadvantaged social groups resident not only in rural areas, but also in small and medium towns, which had the features of industrial monoculture in the past, and which presently experience problems connected with generation of new employment sources and with adjustment of the human resources quality to the labour market needs. In addition to this, their residents are often affected not only by long-term unemployment but also by such social problems as poverty, passivity and lack of self-reliance.

Upgrading qualifications should take place with the use of the resources of existing or emerging local education institutions (schools libraries), Gmina Information Centers and other local institutions, allowing access to Internet, computers, training on ICT. EQUAL would focus on development of grass-root initiatives, voluntary work and self-organization, as the tools of mobilization of local communities.

The highest share of people with the lowest education are employed in agriculture (56 %). The lower level of vocational qualifications, skills, and education among residents of rural areas puts them in a worse situation when seeking job outside agriculture. In the group of residents of villages and small towns encountering biggest obstacles to employment, the share of women and youth is noticeably large. Former employees of state-owned agricultural farms also have little chance to find employment. Activities in support of these groups should make

use of local social networks and involve creating new employment sources.

The ongoing restructuring of such industries as coal-mining, metal (iron, non-ferrous metals) manufacturing, chemistry, arms and light industry necessitates undertaking innovative pilot solutions in relation to the management of an immobile labour force, often for years involved in one workplace, and not accustomed to improve or change their qualifications. DPs involving self-government authorities, employment service and social partners will be able to introduce local strategies or initiatives for inclusion of persons at risk of social exclusion, experiencing labour market inequality and for groups without access to the information society.

Multiple disadvantaged persons on the labour market includes persons with disabilities and their guardians. Their situation is particularly disadvantaged in rural areas and small towns. It proves necessary both to increase their access to information on employment opportunities (including self-employment, entrepreneurship development), and to raise their qualifications with the use of modern information techniques (ICT training, services development via internet).

People of Roma origin are in particular affected by the problem of aggravating marginalization and limited access to the labour market. Most of the employers perpetuate for instance the stereotype, describing an employee of Roma origin as an unreliable person with low qualifications. Measures that target both the Roma community and the wider society, in which they live will assist the process of their social and vocational integration. Changes in the process of education of Roma children should contribute to a decrease in discrimination against this group. DPs implemented should address both research of the situation and the needs of the Roma community, aiming at a better diagnosis of the problem, and implementation of pilot solutions.

Such measures are also necessary in the case of repatriates and recognised refugees, whose access to the labour market is limited, because they do not know the requirements of employers, cultural conditions or because their knowledge of Polish language is insufficient. In the case of these two groups, actions may also include development of methods of raising qualifications adjusted to the needs of these persons. Support under this measures should also be provided to members of families of repatriates, who in Poland do not hold a status of repatriate.

The list of above mentioned social groups is not exhaustive. Activities under EQUAL may cover identification of the other groups facing the barriers to labour market access. Special attention should be paid to equal opportunities for women and men within this theme.

In addition, the aim of the EQUAL thematic approach is to explore new ways of tackling the problems common to different types of discrimination and inequality, rather than focusing on specific social groups. In this context, EQUAL may contribute to the improvement in co-ordination of the activities by working out the holistic approach to the complex problems existing in rural and restructured areas.

The activities under Theme A may cover:

- working out methods of mobilising local communities to create local employment oriented initiatives by taking advantage of the idea of Development Partnerships on the one hand involving disadvantaged groups and on the other hand local institutions and NGOs for joint solution of local problems,
- identification of the groups most threatened with marginalization and identification of

- the barriers they face in finding employment,
- working out the mechanisms of effective vocational mobilisation of the least mobile groups (working out different means of approaching the most difficult clients, including adjustment of the services to the needs of these groups, as well as to the labour market needs), including measures aimed at increasing motivation of these groups to economic activity,
- description of skill shortages in rural areas and areas subject to restructuring and testing the methods of vocational mobilisation and upgrading qualifications adjusted to identified deficits, in particular in the field of modern ICT,
- development of strategies of integrating to information society of groups threatened with social exclusion, experiencing labour market discrimination and inequality; including the raising of awareness of the necessity to liquidate barriers in using modern ICT,
- promotion of measures to raise the awareness of the necessity to participate in lifelong learning and information society, as well as ensuring equal opportunities for women and men,
- support for inclusion of the most disadvantaged groups in the labour market or excluded from it by building new support structures and systems, inter alia through:
 - working out effective methods of co-ordinating activities of institutions and organisations dealing with social and vocational inclusion of the most disadvantaged social groups on the labour market by testing new integrated services,
 - elaboration of a system of training services adjusted to the needs of these groups,
 - working out education DPs providing the residents of remote areas with an opportunity of being competitive on the labour market,
 - working out methods of vocational counselling among groups not used to taking advantage of vocational guidance,
 - checking the efficiency of activities (training, courses, grass-root initiatives) allowing for participation in the information society and testing new methods of up-grading qualifications by the most vulnerable social groups with the use of modern communication and information technologies.

6.1.2 Theme D: Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs

Objective

Support for development and working out a Polish model of social economy.

Justification

The experience of the European Union Member States indicates a considerable contribution of the social employment programmes to a decrease of unemployment effects and reduction of marginalization. Diversity of social economy models in the European Union Member States provides an opportunity for working out, thanks to transnational co-operation, the solution that would be best adjusted to the labour market conditions and to the legal system in force in Poland.

The analysis of the condition of social economy in Poland, presented in Chapter 2, emphasises its growing role in the social and employment policy of the government. It is reflected in newly adopted legal acts: *the law of 24 April 2003 on public profit activities and on voluntary work* and *the law of 23 April 2003 on social employment* as well as the amendment of *the law on co-operatives*. These acts form a basis for activities in favour of social economy. However, taking into account the novelty of these solutions and diversity of entities reckoned towards this sector, there is a need to clarify and to develop the objectives of

social economy, which would address the weakness of the Polish labour market.

The added value of measures undertaken within the Community Initiative EQUAL is in the support for the creation of the Polish model of social economy by testing new solutions, in particular by working out an effective mechanism of moving from the social employment to the first labour market .

It should be emphasised that the support for development of the Polish model of social economy will not only take the form of working out mechanisms to take advantage of social economy possibilities for persons threatened with social exclusion, but also in revitalisation of deprived areas, as well as in bridging the regional gap.

In the light of conclusions of the labour market analysis, the last mentioned element is of particular importance in a situation of low mobility of residents of these areas. Taking into account the relatively high share of persons with low qualifications in these areas, measures undertaken within the framework of this theme will contribute to eliminating threats connected with the labour market dualism (job for well educated/no job for people with low level of education), implemented under theme A, by increasing access to employment for persons, who for various reasons cannot up-grade their education level. Thus, the Community Initiative EQUAL creates an opportunity of working out mechanisms of two-way elimination of threats connected with labour market dualism. On the one hand it is done by up-grading qualifications and adjusting skills to the labour market needs within the framework of Theme A, and on the other hand by development of a market of services provided to local communities and generating sources of employment not requiring high qualifications. It is the objective of EQUAL to develop the social economy as the source of new and innovative jobs, to create tools for social economy in relation to different disadvantaged groups and geographical areas, and finally to raise the level of knowledge of the society on third sector potential.

For counteracting social exclusion and facilitating people's integration into the first labour market, the partnership principle, implemented by EQUAL will be of utmost importance. Within the framework of this theme a network of co-operation will be developed. It will cover institutions hitherto active in the social assistance system, as: powiat centres of family assistance, regional centres of social policy, the labour offices, self-governmental authorities, and regional employers and trade unions. Initiation of co-operation between local institutions will contribute to integration of efforts and mobilisation of local and regional authorities in fight against social exclusion, as well as adjustment of the level of services provided to recognised needs of disadvantaged groups.

Special hopes for the development of social economy are connected with revitalisation of local labour markets and rural areas development. It is an important feature of revitalisation programmes that they are being prepared together with restructuring programmes of economic entities, usually as a single DP. The new approach is based on the sense of corporate social responsibility and commitment to restrain the negative effects of reorganisation by aiding local measures aimed at the support of new forms of development and economic activity. The enterprise, however, should not take the whole responsibility, but should aim at partnership with entities and decision-makers responsible for different spheres of economic and social life, such as: local authorities, counselling and non-governmental organisations, banks and credit institutions, other enterprises. Such approach to structural problems gives better, durable effect.

Tools and methods of work, applied by the social economy, should be also used in revitalisation of villages and small towns. Remoteness of the whole regions of the country, lack of jobs, low level of education, and on the other hand lack of jobs and lack of cheap

housing in towns – all this causes a situation, where those areas are a trap for their residents. The solution should be looked for in restoration of attractiveness of villages and small towns as a place of living, activity, planning of the future, but also as a basis for competition for better opportunities of personal development with residents of larger towns and cities.

This Theme will contribute to solving the problem of labour market inequality in relation to such social groups as:

- youth at risk of social exclusion (including young offenders),
- persons with disabilities, including mentally disability,
- homeless people,
- alcohol and drug addicted people,
- long-term unemployed and economically inactive people,
- prisoners just before release and ex-offenders,
- repatriates and their families,
- refugees,
- ethnic minorities.

In each of these groups one should pay particular notice to the question of equality of opportunities for women and men. Studies indicate that women in a difficult situation on the labour market suffer it much more seriously in result of additional problems of social kind. In addition, according to the thematic approach principle the measures undertaken within the framework of this theme may contribute to the solving the problem faced by other groups, not listed above.

The activities under Theme D may cover:

- promotion of social economy on the Polish labour market through:
- identification and dissemination of existing good practices, both at national and European level,
- raising the level of knowledge of the society on third sector potential,
- developing the Polish model of social economy, including definition of its role and tasks in the field of regeneration of deprived areas, taking advantage of experience of other Member States,
- developing effective mechanisms of supporting persons moving from the second labour market to the first one e. g. testing the methods of support for establishment of social co-operatives,
- developing a platform of co-operation and understanding among the actors of social economy, through development of partnership and creation of new models of activities,
- working out new instruments of social economy and model methods of activity adjusted to the needs of different social groups and to the specific character of geographical areas, where the development of social economy will contribute to restoration of attractiveness of these areas from the point of view of labour market situation and availability of services, including social services,
- testing the methods of mobilisation of local communities in favour of co-operation in the process of revitalisation of local labour markets and development of rural areas, including the promotion entrepreneurs' participation in development and implementation of revitalisation programmes,
- working out model solutions in building the potential of the third sector, in particular up-grading qualifications of employees in management of social enterprises.
- Improving the availability of investment capital for social enterprises.

6.1.3 Theme F: Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies

Objective

- Support and retain employment of those employees whose qualifications can be adapted to the requirements set by information society and market economy.
- Facilitation and assistance in the use of new technologies and innovative ICT solutions and raising awareness of the employers of the necessity for training of managerial staff and employees in order to increase competitiveness of companies.

Justification

A continuous growth of importance of the sector of small and medium enterprises that generates most of the new jobs in the Polish economy, and the impact of technological changes on the development of this sector, give rise to a necessity for constant adaptation of the qualifications of employees to the changing needs of employers.

The essence of this theme aims at increasing the adaptability of firms and employees is to focus on measures targeted at the improvement of the system of retaining employment by persons threatened with the loss of job due to the low level of qualifications, and due to mismatch of skills to the required by employers. Strengthening of previous activities will consist in testing methods of matching the level of employees' qualifications to the development of enterprises connected with introduction of modern technologies.

In this context, a situation of people subject to discrimination and inequality on the labour market on grounds of age is also dangerous. Activities in support of people aged between 44–64 should aim at improving their qualifications, increasing their mobility, developing abilities to direct their own occupational development and adaptability to changing work conditions. As OECD experience shows, including the Polish experience, a system of early retirement, disability pensions and pre-pension benefits and allowances do not constitute a solution to the problem of high unemployment, especially in the light of the fact that both pre-pension allowances and benefits are financed by the Social Insurance Fund and the Pension Fund of the Agricultural Social Insurance Fund. The high level of payments from these sources results, in a situation of high labour costs, in the growing structural budgetary deficit, which makes it difficult to carry out an adequate social policy. This induces both a decrease in the means for vocational activation financed by the Labour Fund and an increase in labour costs of employers. At the same time one should pay attention to the fact that demographic forecasts indicate that soon there might appear shortages on the labour market, which might be conducive to a reversal of the problem. In case of this group, changing of vocational qualifications should be supplemented with alternative forms of employment (part-time employment), counselling co-operatives, and activation of the measures in support of local communities. The measures of the Community Initiative EQUAL create an opportunity of strengthening actions undertaken within the framework of national policy, which include among others the Programme of promoting economic activity of persons 50+, that is being prepared for implementation, and planned changes in the legislation, which restrain application of instruments of de-activation in favour of employment promotion.

These activities will be accompanied with measures in favour of dissemination among employers and workers of lifelong learning, as a factor increasing competitiveness of enterprises and diminishing the risk of redundancies. Encouragement to raise qualifications is of particular importance for older employees, who relatively often are attached to traditional forms of work and traditional occupations.

Measures implemented under this theme will be an element complementing and strengthening

the development of lifelong learning defined in the draft law on employment promotion (Training Fund in enterprises) and in the *Strategy of Lifelong Learning Development till 2010*.

Since lifelong learning system and utilisation of modern technologies are relatively least popular among employees and employers of SMEs sector (increase of innovations in SMEs is one of the key elements of the national innovation policy), actions will focus on the strengthening of structures and schemes supporting adaptability in this sector.

Most of jobs generated by small and medium enterprises belong to workplaces that do not require a high level of qualifications and are located mainly in small enterprises. Such employment policy, in particular in SMEs, does not favour competitiveness growth and hampers development.

Under such circumstances a challenge for the Polish policy in the field of supporting entrepreneurship is to promote changes in the structures of employment and work organisation, and to continuously improve qualifications of employees, in order not only to retain work places, but also to create new ones. DPs implemented in support of the disadvantaged groups, whose position on the labour market is poorer as a result of their low education level, should first of all contribute to elaboration of effective forms of training coupled with a practical learning of new skills, temporary employment, job rotation, outplacement.

Co-operation under partnerships of different institutions - employers, employees, social partners, educational institutions – will enable implementation of innovative DPs introducing flexible methods of work and management. It will also allow for elaboration of work models within the frames of the measure, taking into account both the needs of an enterprise, and the life situation of its employees related to their family situation or health (for example tele-work, rotational jobs, part-time employment, etc.).

The basis of this measure is to increase possibilities of equal participation in educational, informative and counselling undertakings, as well as the empowerment principle, i.e. the involvement of the disadvantaged groups in implementation of a DP (having influence on their own situation).

This Theme will contribute to solving the problem of labour market inequality in relation to such social groups as:

- entrepreneurs, who for various reasons brought about for example by low qualifications, lack of adequate means, and disadvantageous localisation, are deprived of opportunities to develop their enterprises in the sphere of the application of new technologies and in particular in the domain of ICT;
- SMEs employees threatened with loss of job due to factors such as
 - age, gender, education, insufficient qualifications, family situation, disability or place of residence.

The activities under Theme F may cover:

- elaboration of analyses aimed at recognition of barriers in adaptability of the Polish enterprises in the field of use of new technologies, covering sectional studies of various types of enterprises and taking into consideration various types of adaptability indicators,
- working out model solutions of supporting SMEs in the process of the use of new technologies and innovative methods of management,
- testing innovative methods of promotion and implementation of flexible forms of employment and work organisation to work out model solutions, taking into

consideration both the needs of enterprises and the situation of workers connected with their family or health condition, such as telework, work rotation, part-time employment or flexible hours of work,

- testing innovative methods of inclusion to activities aimed at up-grading qualifications of employees threatened with the loss of job due to lack of skills adjusted to the needs of entrepreneurs, resulting from the development of new technologies and due to barriers impeding job retention, such as age, disability, place of residence, etc.,
- working out methods of dissemination among SMEs of human resources' development strategies,
- promotion and implementation of lifelong learning principles among most vulnerable workers,
- working out new forms of training combined with practical training in new skills (job rotation, outplacement, mentoring, individual training programmes, peers assistance), to maintain employment of workers threatened with the loss of job,
- working out methods of jobs' retention (e.g. older employees as mentors).

6.1.4 Theme G: Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services

Objective

- Elaboration of model solutions furthering reconciling of vocational and family life, including support for development of the institution of child and dependant care, facilitation of improving qualifications, promotion of flexible employment forms.
- Dissemination of the idea of equal opportunities and creation of suitable instruments and mechanisms directly addressed to women and men as potentially economically active people, and to employers and policy makers.

Justification

As it was emphasised in chapter 2, the introduction of adequate legislative solutions that would ensure women and men equality of opportunities on the labour market and be reflected both in the Constitution and the Labour Code still needs develop in Poland. The stereotypes, of which both employers and women themselves make use of, are the reason that the gap between women and men as regards opportunities for access to the labour market, retaining of permanent employment and adequate payment has been constantly growing.

It is the role of Community Initiative EQUAL to develop methods of increasing the effectiveness of already functioning solutions favouring reconciliation of occupational and family life and equalization of opportunities of women and men. The Community Initiative EQUAL focuses on seeking solutions, which would complement previous measures, for example by disseminating good practices tested in other Member States or testing the mechanisms of equalisation of opportunities and reconciliation of occupational and family life in those areas. As an example of such measures one may mention mechanisms of retaining economic activity of women and men on the labour market in the course of career break, resulting from the necessity of taking care of dependants.

In a context of activities aimed at increasing the effectiveness of previous legal solutions or programmes, the Community Initiative EQUAL will contribute to development of mechanisms of effective monitoring legal observance in the field of equal treatment of women and men. The particular attention will be paid to linking activities carried out in this field with measures implemented within the framework of second stage of the National Action Plan in favour of women, in particular to activities under the competence of the National Labour

Inspection.

Measures under the Community Initiative EQUAL will also focus on testing methods of increasing effectiveness of previous methods of vocational mobilisation of women and measures in favour of entrepreneurship development. As concerns entrepreneurship development, the applied measures will first of all aim at working out methods of facilitating women business start-ups in sectors of the economy, where the new information and communication technologies are gaining on importance.

A higher share of women among persons exercising occupations requiring the skills in new technologies' utilisation will favour the reduction of occupational segregation, which – as the analysis presented in chapter 2 shows – exists not only on the labour market, but also in the education and training system.

Traditional classification of occupations into male and female ones not only diminished women's access to the labour market, but also leads to feminisation of low-paid occupations, thus contributing to wage gap. Although, as statistics show, women are better educated than men, their labour market position is much worse. Among women we observe the lower level of economic activity than among men, higher unemployment rate, lower wages/salaries and limited access to decision-making posts. The vertical segregation is accompanied by - still existing on the Polish labour market – horizontal segregation, that is classification of occupations and even the whole sectors as traditionally male or female. Counteracting stereotypes in the choice of occupation and kind of employment, stimulating the development of women's careers to allow for their promotion, as well as education activities to raise the awareness of employers in the field of equal status and prohibition of discrimination should become the main methods of equalisation of employment opportunities and counteracting labour market segmentation. As a complementary activity it is also necessary to monitor the observance of legal regulations in force in the field of prohibition of women's discrimination and of the principle of equal treatment and equal opportunities of women and men on the labour market. Therefore, one of the key measures in the framework of the Community Initiative EQUAL is to work out mechanisms of counteracting horizontal vocational segregation. These activities will be accompanied with measures in favour of counteracting vertical vocational segregation, as a barrier in access to managerial posts, which – beside the horizontal segregation – is an element impeding equality of opportunities of women and men on the labour market. In this context, the role of the Community Initiative EQUAL is to complement and strengthen activities undertaken within the framework of the national policy, in particular positive measures in favour of women, implemented under the Sectoral Operational Programme Human Resources Development and the second stage of the National Action Plan measures in favour of women.

The analysis of the problem of unemployment of women shows that more and more often the main cause of their disadvantages as regards employment, apart from the education and qualifications' level, is their role in the family. All this despite the laws ensuring for example the right to care for sick child or the right to parental leave for both parents. Actually, the rights are poorly exercised because of both the stereotypes in perception of the woman's role and the lack of an appropriate institutional background that would enable reconciliation of occupational and family functions. Implementation of DPs by partnerships involving local organisations, self-government authorities and entrepreneurs stands a chance to contribute to the development of care forms that would make use of local premises and personnel resources. One of the care forms might provide self-support organisations.

The measures taken to increase access to care and educational services and to eliminate communication barriers will also have a complementing and strengthening character.

Particular role will be played by a principle of partnership as a method of increasing participation of entities involved in activities in favour of women, as well as the principle of empowerment as a method of increasing women's participation in formulating the national policy in the field of reconciliation of occupational and family life of women and men. Measures in this regard will cover development of methods of mobilisation of local communities, including participation of non-governmental and mutual-aid organisations in activities in favour of elimination of barriers impeding or hampering reconciliation of occupational and family life.

In addition, promotion of flexible forms of employment, which by making use of such possibilities as for example flexible working time or tele-work will facilitate reconciliation of family and occupational life, and thus will contribute to an increase of employment of women, is indispensable among all the participants of the labour market.

This Theme will contribute to reducing the problem of labour market inequality in relation to such social groups as:

- women and men returning to the labour market after a break caused by performing of their family duties,
- women and men for whom the child care and care of dependants is a barrier in entering the labour market,
- lone parents,
- women from rural areas and regions in a difficult economic situation.

The activities under Theme G may cover:

- testing the efficiency of traditional methods of vocational mobilisation of persons excluded from the labour market due to their family responsibilities (their participation in trainings and apprenticeships, development of institutional assistance for economic activity of women),
- testing the efficiency of hitherto activities in favour of women's entrepreneurship and analysis of kinds of businesses started by women,
- working out an effective system of incentives for women to start up business in the field of services with the use of modern technologies,
- analysis of women's work in the „grey sphere” and working out methods of counteracting this phenomenon, including development of effective system of incentives to transform illegal work into legal employment by testing solutions aimed at the liquidation of legal and fiscal barriers,
- development of mechanisms of maintaining economic activity and up-dating vocational qualifications in the course of break for taking care of children and dependants,
- working out effective mechanisms of preventing vocational segregation (horizontal and vertical),
- dissemination of knowledge and monitoring law observance in the field of rights connected with paternity and signs of discrimination on grounds of sex,
- promotion of women's employee rights, in particular the right to equal pay for work of equal value,
- working out methods of cooperation between NGOs, self-governmental authorities and enterprises to create and run care and educational facilities and to liquidate communication barriers, and barriers connected with organisation of care of dependants,
- testing new methods of promotion of flexible forms of employment and work organisation, as a means of reconciling vocational and family life, among women and

men seeking job and employers, and raising the employers' awareness in the field of equal opportunities of women and men.

6.1.5 Theme I: Supporting the social and vocational integration of Asylum-Seekers¹⁵

Objective

- Improvement of the system of institutional care
- Development of analyses and research aiming at diagnosis and prognosis of the immigration phenomenon and of the labour market situation of these groups
- Raising public awareness in this field.

Justification

In the case of asylum seekers, there is a need not only to provide these persons with opportunities of learning Polish language, but also training on cultural differences, legal system, and in particular on their rights and responsibilities. Activities aimed at bridging the gap in the system of institutional care through counselling and information on employment opportunities are also of utmost importance. However, one should notice that activities under the Community Initiative EQUAL should only accelerate future vocational inclusion of persons who will be granted the refugee status. Thus, these are the activities targeted at preparation for possibly quick vocational inclusion after receiving the refugee status, and not activities in favour of inclusion itself, for example vocational counselling or information on employment opportunities after receiving the refugee status. Besides, activities in favour of persons applying for refugee status must meet legal requirements and must correspond to the directions of the Polish immigration policy.

The growing number of asylum seekers and the assumed further growth of their number expected after accession of Poland to the European Union creates a necessity for a complete diagnosis of the situation of these people to plan changes that would adjust the system of support for them to their needs. At the moment such research is being conducted in Poland to a limited extent and it does not bring a complete picture of the situation. Full diagnosis of the situation will allow for adjustment of an offer of services, granted assistance and training programmes for persons dealing with such groups to their actual needs. It is particularly important not only on account of potential increase in a number of asylum seekers after Poland's accession to the EU, but also due to new legal solutions, which enlarge the groups of persons having the right to protection on the territory of the Republic of Poland.

Effective social and preparation for vocational integration also requires methods of coordinating activities of institutions and organisations providing assistance to these persons, with particular attention paid to the role and tasks of non-governmental organisations in the system of institutional protection.

Activities under this theme should also focus on activities aimed at dissemination of knowledge of these various groups within the Polish society. These DPs will cover such activities, as information on countries of origin, counteracting stereotypes in perception of these groups in the society, among others by adding multicultural dimension to education programmes and by promotion of these persons among employers.

In 2004 also the resources of the *European Refugee Fund* will be available to Poland. They will support state activities in favour of refugees and displaced persons. It is planned to designate these resources, amounting to about 0.4 MEUR, for the implementation of DPs in the field of:

¹⁵ In the meaning of CIP EQUAL asylum seekers are applicants for granting the refugee status

- conditions of reception,
- integration of persons whose stay in the Member States is of lasting and/or stable nature ,
- repatriation, provided that the persons concerned have not acquired a new nationality and have not left the territory of the Member State.

Even if the activities in favour of asylum seekers under theme 6.1.5/I are to some extent similar to activities planned to implement under *European Refugee Fund* in Poland, there will not be direct overlaps thanks to the different principles of EQUAL e. i. innovation, empowerment, partnership, transnational co-operation. In addition, in order to avoid double financing of proposals concerning refugees and asylum seekers, there will be co-ordination at selection stage between Ministry of Economy, Labour and Social Policy, Ministry of Internal Affairs and Administration and Office for Repatriation and Foreigners.

Disadvantaged groups:

- people applying for refugee status,

Other partners:

- the Office for Repatriation and Foreigners,
- voivodship offices,
- community social assistance centres,
- non-governmental organisations that serve asylum seekers.

The activities under Theme I may cover:

- improvement of a system of diagnosing and forecasting the phenomenon of asylum seekers inflow to Poland,
- adjustment of the support system to the beneficiaries needs in terms of language skills, vocational training, information on culture, rights and duties as well as employment possibilities,
- strengthening public institutions and NGOs implementing public policy in this regard,
- developing a partnership network and co-operation of institutions dealing with problems of asylum seekers,
- transfer of good solutions in this field thanks to transnational co-operation.
- raising public awareness on multicultural dimension by means of education and promotion.

6.2 Horizontal issues

Victims of human trafficking.

Prevention as well as reducing effects of human trafficking is a new challenge for the second round of EQUAL.

The European Council has called on Member States to use the available tools to support victims of trafficking, in particular EQUAL. Action within the European Union is being developed taking a comprehensive and multidisciplinary approach towards preventing and combating these phenomena. In terms of financial support, Community programmes are an important tool for strengthening policies, practices and cooperation in the EU and between EU Member States and accession countries in the fight against human trafficking. In particular the Structural Funds (ESF and ERDF) can financially support actions to provide assistance to victims, as well as undertaking prevention and facilitating the social and

economic integration of victims of human trafficking. In particular, the Council invited¹⁶ the Commission and the Member States to use the financial resources of the Community Initiative EQUAL to promote, in accordance with national law, the social and vocational integration of its beneficiaries, to make it possible for them to return safely to their countries of origin or to receive adequate protection in their host countries.

The support for victims of trafficking in Poland is therefore a horizontal issue which can be supplied under all priorities of the Polish EQUAL CIP. All relevant activities under EQUAL will be co-ordinated with *the National Programme of fighting and counteracting trafficking*. This Programme was prepared by the Ministry of Internal Affairs and Administration and then adopted by the Council of Ministers in September 2003. The main goals of the Programme are:

- establishment of the co-operation system among various public bodies and NGO's dealing with trafficking in terms of analyzing and counteracting this phenomenon;
- preparation of the proposal of necessary changes in legal acts enabling international co-operation in this field;
- increasing the effectiveness of undertaken actions (training for respective services);
- support for victims of trafficking (mobilizing different institutions, preparing integration programmes, training social workers).

Implementation of this Programme will last 1,5 year and will complement the actions under EQUAL.

Local development

The implementation of measures defined in the CIP should bridge the regional gap in Poland and should contribute to social and economic cohesion. DPs implemented under the respective themes should result in improving the attractiveness of local labour markets, the quality of life, the local environment, in mobilisation of local communities and in promotion of partnership approach to problems' solution. DPs in the area of social economy development and measures aimed at developing human resources at the local level, will be particularly significant here. The character of the Programme enables implementation at the central, regional and local level. DPs will also serve to support local initiatives aimed at working out effective methods of bridging the regional gap resulting from inequality in labour market access. The inclusion of representatives of local self-governments, NGOs and all groups interested in measures in support of an active labour market policy, vocational and social inclusion and the development of an information society is also an important element enabling the impact of programme implementation on local development. Among activities under which DPs of regional and local range will be particularly important, we can mention Theme A *Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all* and Theme D *Strengthening of social economy (the third sector) in particular the services of interest to the community, with a focus on improving the quality of jobs*.

Equal opportunities for men and women

¹⁶ Council Resolution on initiatives to combat trafficking in human beings, in particular women, 20th October 2003, 13056/03

The policy of equal opportunities for men and women will be in particular implemented through Theme G *Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services.*

Activities carried out under this theme will aim at increasing equal opportunities not only through working out methods of raising the effectiveness of standard labour market instruments in relation to women, but also through testing new methods of diminishing disproportions, which have not yet been taken into consideration in positive measures in favour of women within the framework of the national policy.

In addition the principle of equal opportunities for women and men will be followed in the implementation of all other themes under CIP. The implementation of this horizontal issue will be monitored by means of indicators accordingly defined in the Programme Complement. The Monitoring Committee will supervise the programme's correct implementation and observance of the equal opportunities' principles. The equal share of women and men in the Monitoring Committee itself will show the priority meaning of the principle of equal opportunity, in compliance with the European Union policy in this area.

Development of an information society

Standing up to global competition calls for measures aimed at supporting the development of an information society. Raising the technological level is a permanent process, which requires development of skills enabling to take advantage of ICT, up-dating knowledge of modern forms of work management and organisation, and raising the level of education.

The importance of ICT for employment increase and reducing unemployment has been emphasised in one of the strategic documents of the Polish policy of innovativeness - *e-Poland. Action plan in favour of information society in Poland for 2001-2006*, referring to the European initiative *e-Europe – An Information Society for All*.

EQUAL will support activities carried out within the framework of the national policy of innovativeness by working out effective methods of integrating persons experiencing labour market inequality due to skills shortages to the information society. In this context, an important role in the development of an information society will be played by activities under Theme A: ***Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all*** and Theme F: *Supporting adaptability of firms and employees to structural economic changes and the use of information technology and other new technologies*. The activities implemented under these themes will put special emphasis on the need for development and improvement of skills enabling to take advantage of modern technologies and the need for developing and up-grading education and vocational skills.

However, activities in favour of developing an information society will not be restricted to activities under the above mentioned themes. Although activities under Theme G *Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services* focus on positive activities in favour of women, use of ICT will have major significance in the selection of DPs. Therefore the selection of DPs an attention will be paid to use of ICT in the process of working out mechanisms to increase women's employment and diminish occupational segregation.

Sustainable development

The strategy of sustainable development plays a very important role in the European Union policy. This priority approach is reflected in long-term objectives of the *European Strategy for Sustainable Development*. The Polish government referred to this issue in the document “*Poland 2005 – Long-term Strategy of Durable and Sustainable Development*”, taking into account the principles developed by the European Union.. Technological progress and the appearance of new production solutions promoting economic management in accordance with environmental needs are particularly important for sustainable development. The activities aiming to ensure sustainable development must take into account both the well-being of the natural environment and of the society and the economy as well as their reciprocal influences. The development of eco-products, ecological services, the means of recycling waste and energy are the new areas for business and labour market activity.

Measures implemented under EQUAL will have an impact on protecting and enriching the environment and economic and social capital by promoting ICT. The activities will contribute to creation of the so called “green jobs” and preventing social exclusion also in environmentally polluted areas and in peripheral environment protection areas. Important is, that EQUAL gives chance to all involved partners but foremost to the regional and local government, to enhance their qualifications in regard to the achievement of sustainable development, including the preparation to the function of informing society about the natural environment.

Each Development Partnership will take into account the need to ensure sustainable development at each implementation stage and after the completion of the DP.

6.3 Evaluation of the impact anticipated

Poland joins the Community Initiative for the first time in the years 2004 – 2006. The principle of developing partnerships to implement the programme has not been so far applied in Poland on such a scale. Unlike the 15 EU Member States, Poland may not base its EQUAL CIP upon the experience of ADAPT and EMPLOYMENT. For these reasons the process of evaluating anticipated impact is in Poland longer and more difficult than in other Member States. It requires many meetings and consultations both with institutions responsible for the implementation of employment, education, and social policies, and their financing, and with potential leaders of partnerships for development. Consultations are presently carried out and should provide information on the number of partnerships, which will be created in Poland for different priority themes, their size, partners, how many persons from disadvantaged groups will participate in DPs’ implementation.

A factor, which additionally has impeded the evaluation of the anticipated impact, is parallel programming of operational programmes of the National Development Plan, including programmes co-financed by ESF, with the programming of the Community Initiative EQUAL in Poland. Thus, the reference to experience resulting from implementation of programmes co-financed by structural funds is also not possible.

Besides, when examining the possibility of making a full appraisal of anticipated impact of the programme one should not disregard the specific character of the programme itself, which is aimed at supporting systems and structures and at testing innovative labour market instruments. For this reason it should be borne in mind that simple quantitative indicators, which prove correct in evaluation of the main ESF programmes, do not fully reflect the value and quality of impact of Community Initiative EQUAL on the development of labour market instruments.

Taking the above into consideration, the evaluation of anticipated impact of the Community Initiative EQUAL in Poland in 2004-2006 is limited to presentation of general factors affecting the effectiveness of programme implementation, defined in ex-ante analysis, and to presentation of estimate data based on results of social consultations.

The general factors affecting programme effectiveness include:

- development of efficient mechanism of partnership creation by building various forms of Development Partnerships, including its various composition, adjusted to the specific needs of various regions,
- observance by partnerships of rules concerning the time frame of individual actions,
- development of innovative approaches in combating discrimination and inequality on the labour market in the learning and benchmarking process of participating organisations,
- increasing good quality of DPs and efficient DP management,
- development of mechanisms of active participation of persons experiencing inequality and discrimination on the labour market and empower them to participate in social inclusion process,
- efficient utilisation of transnational co-operation to ensure that they are utilised not only in the environment of specific Development Partnerships, but are widely disseminated and inspire new activities,
- development of effective mechanism of mainstreaming which will allow the adaptation of programme results to national policies, including ESF mainstream programmes,
- continuation of national and transnational co-operation also after completion of the programme,
- improvement of social climate in the area of issues related to discrimination and inequality; in this context the measure of achievement of anticipated results may be public opinion poll before and after completion of the programme.

6.4 Complementarity of the EQUAL CIP in relation to the National Development Plan

When programming the scope of this Community Initiative in Poland special attention was paid to the complementarity between the *EQUAL CIP* and the *National Development Plan* in particular ESF mainstream programmes.

EQUAL themes are complementary in relation to ESF mainstream programmes measures by **strengthening** the meaning of measures implemented under SOP HRD and IROP.

This reinforcement means:

- clear address of EQUAL themes to groups who have left or are threatened with being pushed out from the labour market, as well as groups at the verge of exclusion, just because of inequalities and discrimination – and so – their opportunities are lower than opportunities of other unemployed, which means that those are the most disadvantaged groups;
- utilisation of innovative methods of activity, which – thanks to a kind of pilot exercise in a form of EQUAL – may become new patterns, models of activity, worth assimilation to future national policies. These are the following kinds of actions (NEW MODELS OF ACTION):
- vocational restart of high risk groups in particular under theme 6.1.1/A and theme 6.1.2/D reinforces activities under Measure 1.3 , 1.4 and 1.5 of SOP HRD,
- utilisation of (after building the basis for) social economy institutions in regeneration of deprived areas under theme 6.1.2/D complement activities in favour of social

integration under Measure 1.5 of SOP HRD as well as measures 2.3 and 2.4 of IROP aimed at vocational reorientation of persons leaving agricultural sector and those affected with restructuring process,

- new patterns of adaptability connected with focus on the improvement of ICT competencies in the companies' staff under theme 6.1.3/F complement measure 2.3 of SOP HRD and measure 2.6 of IROP,
- reconciliation of family and professional life, also through working out of the mechanisms of maintaining economic activity in the course of break for taking care of children and dependants under theme 6.1.4/G extend the scope of measure 1.6 of SOP HRD,
- development of a system of integration in favour of asylum seekers under theme 6.1.5/I refers to measure 1.5 of SOP HRD among others aimed at social integration of refugees ;
- utilisation of the social partnership model, which is an innovative solution to be developed in Poland, and in the case of EQUAL is necessary and complementary for other documents, such as SOP HRD, where the requirement of partnership is much less pronounced (NEW INSTRUMENT – PARTNERSHIP);
- addressing a part of actions described in EQUAL themes to residents of rural area, which means facing one of the challenges of the Polish labour market, unfortunately often disregarded in other documents.
- It seems that such an approach to EQUAL reveals its innovative and fully complementary character. The tables in annex to this chapter present the detailed information on complementarity between EQUAL themes and ESF mainstream programmes measures.

In addition, the selection system will ensure that there is no duplication between EQUAL and mainstream programmes. The SOP HRD and IROP Managing Authorities will be consulted at Development Partnerships selection stage to avoid double – financing of DPs and that activities under EQUAL add value to those already supported within SOP HRD and IROP.

As concerns the programmes supported by another structural funds, EQUAL measures are of complementary character in relation to *Sectoral Operational Programme Restructuring and Modernisation of the Food Sector and Rural Development, Sectoral Operational Programme Fisheries and Fish Processing, Sectoral Operational Programme Improvement of Competitiveness of Enterprises* as well as the priorities of IROP supported by the *European Regional Development Fund*.

EQUAL particular attention is paid to levelling up regional differences in economic development through providing groups experiencing labour market inequality with an opportunity of participation in the development of information society (rural areas and areas subject to restructuring). This objective directly refers to activities in favour of development of regional and local infrastructure of information society under IROP priority: *Development and modernisation of infrastructure to enhance the competitiveness of regions*.

The development of widely conceived social economy as a source of new and innovative jobs will contribute to higher effectiveness of activities in favour of the development of social infrastructure, providing residents of rural and restructured areas with access to basic services, including social services. These activities will be carried out under the IROP priority *Local development*. The principle of partnership, observed in implementation of Initiative EQUAL, is of particular importance here, as an element promoting the activity of local communities and the development of co-operation in implementation of developmental tasks.

The concentration of EQUAL activities on rural areas is among others an instrument

supporting the measures of the *Sectoral Operational Programme Restructuring and Modernisation of the Food Sector and Rural Development* through the measures aimed at the utilisation of new ICT and increasing the opportunities of residents of rural areas to find employment outside agriculture, vocational mobilisation of the most vulnerable groups from rural areas (women, elderly persons, persons with disabilities).

Levelling up labour market inequalities in restructured areas, as one of the objectives of EQUAL, is also an element of support for measures, in particular of innovative character, in favour of mitigating effects of loss of job by fishing men and women in result of restructuring of fisheries, undertaken under one of the priorities of *Sectoral Operational Programme Fisheries and Fish Processing*.

Community Initiative EQUAL refers to priorities 1 and 2 of the *Sectoral Operational Programme Improvement of Competitiveness of Enterprises*. The measures implemented under these priorities will be aimed at supporting institutions surrounding business, growth of SMEs competitiveness through counselling and supporting the product competitiveness and technological competitiveness of enterprises.

6.5 Financial allocation

The total allocation of the European Social Fund to the implementation of Community Initiative EQUAL for 2004- 2006 amounts to 133,938,206 EUR. The required national public co-funding of EQUAL programme will amount to 44,646,069 EUR .

Theme	% of the total funding allocation	Allocation ESF in EUR	National public co-financing in EUR (MoELSP)
6.1.1/ A Facilitating access and return to the labour market	33,8 %	45 271 116	15 090 374
6.1.2./D Strengthening the social economy (the third sector)	27,4 %	36 699 068	12 233 022
6.1.3./F Supporting the adaptability of firms and employees	21,1 %	28 260 961	9 420 320
6.1.4./GReconciling family and professional life	9,0 %	12 054 438	4 018 146
6.1.5./ I Supporting the social and vocational integration of asylum seekers	1,7 %	2 276 949	758 983
Technical assistance	7,0 %	9 375 674	3 125 224
TOTAL	100	133 938 206	44 646 069

ESF Policy Fields	EQUAL themes	Sectoral Operational Programme Human Resources Development (SOP HRD)		
		Measures	Target groups	Added value of EQUAL

<p>Development and promotion of active labour market policies</p>	<p>Theme A</p>	<p>Measure 1.1 Development and modernisation of labour market measures and institutions by:</p> <ul style="list-style-type: none"> - development of the institutional capacity to service the labour market, - development of the network of vocational counselling and information services, - development of the system of training for the unemployed and job seekers, - development and improvement of labour market instruments. <p>Measure 1.3 Counteracting and combating long-term unemployment</p> <ul style="list-style-type: none"> - implementation of individual training programmes and special programmes, - organisation of counselling, training and promotion of entrepreneurial approach, - offering assistance to organise self-organisation and mutual aid among the unemployed, through counselling and training, which will lead to obtaining employment, - supporting other employability measures. 	<ul style="list-style-type: none"> - labour market institutions (including NGOs), - staff of the public employment services, - local government administration of all tiers, - Ministry of Economy, Labour and Social Policy, - social partners, - vocational associations, chambers of commerce, <ul style="list-style-type: none"> - adults 25 years of age and above who have been unemployed for less than 12 months (excluding graduates), - people who remain unemployed up to 24 months. 	<ul style="list-style-type: none"> - contributing to increase impact of NGOs on labour market, and develop dialogue with social partners and other actors (e. i. non-public entities, local communities) by their direct involvement in activities aimed at the development of labour market instruments and thus allowing grass-root methods of creating employment policies, - working out effective methods of coordinating activities of institutions and organisations dealing with social and vocational inclusion in order to create new integrated services, adjusted to the needs of the most vulnerable groups on the labour market, - focusing on the most vulnerable groups on the labour market in improving standards of services in the field of labour market information and vocational counselling (adjusting guidance service standards to their needs, dissemination of vocational guidance services among these groups), - focusing on identification of barriers met by the most vulnerable social groups on the labour market in the field of ICT training allowing their participation in information society development, - identification of and focusing at the most vulnerable social groups experiencing labour market inequality and discrimination is an opportunity for working out methods of vocational mobilisation of groups not covered by standard labour market instruments, or groups for whom standard measures of labour market institutions are ineffective (long-term unemployed, economically inactive persons, Roma people etc.), - working out different means of approaching the most difficult clients including measures aimed at increasing motivation of these groups to economic activity.
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<p>Promotion of equal opportunities in labour market access to all – counteracting social exclusion</p>	<p>Theme A Theme D Theme F</p>	<p>Measure 1.3 Vocational and social integration of the disabled -supporting the disabled through tailor made services, -assisting employers to employ and integrate disabled people into the first labour market, - building of regional and local knowledge and capacity for the implementation of new measures</p>	<p>disabled people (with severe and moderate scale degrees of disability), especially those who: enter the labour market for the first time,are long-term unemployed, have the biggest problems related to the entry onto the labour market, labour market institutions, institutions working with the disabled, social partners, NGOs, non-profit organisations, social service providers, grass root initiatives, regional and local government administration.</p>	<ul style="list-style-type: none"> - extending SOP HRD measure in favour of disabled by focusing on participation in information society, - working out new methods of up-grading qualifications in the field of new technologies allowing the broader using of flexible forms of work organisation in vocational integration of the disabled e. i. tele-work, - active participation of employers and local communities in the process of vocational and social integration of the disabled thanks to the partnership approach, - working out new methods of vocational and social integration of disabled, - working out effective methods of co-ordinating activities of institutions and organisations dealing with vocational and social integration and their employers, - working out effective methods of increasing access to labour market for disabled who for various reasons cannot up-grade their education level in the framework of activities under theme D, - improvement of the system of retaining employment of disabled threatened with the loss of the job in the framework of activities under theme F.
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<p>Promotion of equal opportunities in labour market access to all – counteracting social exclusion</p>	<p>Theme A Theme D</p>	<p>Measure 1.5 Promotion of active social policy in support of high risk groups:</p> <ul style="list-style-type: none"> - supporting social and labour market integration of people threatened with social exclusion in particular supporting employment through activities of the Social Integration Centres (SIC), subsidised employment, - supporting youth threatened with social exclusion, - developing the system for counteracting social exclusion. 	<ul style="list-style-type: none"> - people threatened with social exclusion with special attention to long-term beneficiaries of social assistance benefits: - long-term unemployed (24+), in case of SIC unemployed (36+), - alcoholics and drug addicts undergoing treatment, - the homeless, - ex-offenders, - refugees with integration problems, - young people being brought up in the substitutive care institutions and foster families, - youth between 15-24 years old with social dysfunctions - workers of the social services providers (including NGOs), - social services providers, including NGOs, teachers, tutors and instructors working with the troubled youth, - employers, - volunteers. 	<ul style="list-style-type: none"> - extending SOP HRD social inclusion measures by focusing on social exclusion problems from the standpoint of participation in information society, and by working out the methods aimed at eliminating inequalities related to the development of new technologies, - complementing SOP HRD target groups by including to the EQUAL ones: prisoners just before release, repatriates and their families, ethnic minorities, - complementing activities in favour of preventing social exclusion within the framework of SOP HRD by working out an effective mechanism of moving from the temporary employment to the first labour market, - supporting the creation of the widely conceived model of social economy covering not only social employment, but also other instruments; definition of its role not only in vocational mobilisation of persons threatened with social exclusion but also in revitalisation of deprived areas, including improvement of accessibility to the social services, - active participation of employers and local communities in the process of counteracting social exclusion as well as in revitalisation of deprived areas thanks to the partnership principle, - promotion of social economy on the Polish labour market (identification and dissemination of existing good practises, raising the level of knowledge on the third sector potential), - developing the platform of cooperation and understanding among the actors of social economy, trough development of partnership and creation of new models of action,
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<p>Promotion and development of training, education and guidance – lifelong learning</p>	<p>Theme A</p>	<p>Measure 2.1 Increasing access to education – promoting lifelong learning:</p> <ul style="list-style-type: none"> - reducing educational gap between rural and urban areas, - facilitation of access to education for students with special educational needs (purchase of modern specialist equipment), - development of continuing and adult education (lifelong learning) system, including distance learning. <p>Measure 2.2 Improving education quality and relevance to the labour market needs:</p> <ul style="list-style-type: none"> - increasing of ICT use in educational process (provision of schools, including special schools, teachers' training centres, CEC and PTC with computer equipment), - graduates' employability fostering, - teachers' training - accreditation of educational institutions, - survey on the basic skills level (literacy) among pupils of the third grade of primary school, - research on key educational indicators, - building the system of data collection and analysis. 	<ul style="list-style-type: none"> - primary schools, gymnasias, upper secondary schools and kindergartens (staff, pupils and institutions), - students with disabilities, - staff of local, regional and central education administration, - libraries in primary schools, gymnasias, - upper secondary schools and their users (young and adults), - pedagogical libraries, - local communities, - educational institutions providing continuous learning education and their adult learners, - tertiary education schools and their students. - teachers, including graduates from selected pedagogical fields of study who work as teachers, - Central and Regional Examination Boards - Continuous and Practical Education Centres - psychological and pedagogical information and guidance centres 	<p>complementary character of EQUAL in relation to education measures of SOP HRD mainly consists in targeting activities under theme A at the most vulnerable social groups, in particular the adults residents of rural and restructured areas not having habit of upgrading qualifications,</p> <ul style="list-style-type: none"> - identification of skill shortages and testing methods of vocational mobilisation and upgrading qualifications, in particular in the field of ICT, - mobilisation of local communities to utilise existing resources inter alia created thanks to ESF support under SOP HRD, in initiatives aimed at upgrading qualifications of the most vulnerable groups in the area of modern ICT, - raising the awareness of the necessity to participate in lifelong learning and information society,
<p>Development of</p>	<p>Theme F</p>	<p>Measure 2.3 Development of</p>	<ul style="list-style-type: none"> - employers and their 	<ul style="list-style-type: none"> - focusing on employees threatened with the loss of job,

<p>entrepreneurship and adaptability</p>		<p>staff for modern economy:</p> <ul style="list-style-type: none"> - enhancement of the qualifications and skills of the management and employees of enterprises, - ensuring appropriate skills and qualifications of screening centres' personnel and health care personnel in the field of cancer prevention, - facilitating the transfer of knowledge and strengthening the cooperation between universities and enterprises, - facilitating introduction of new forms of employment and work organisation. 	<p>employees, particularly in SMEs,</p> <ul style="list-style-type: none"> - self-government units, - social partners, - staff of R&D centres, - training institutions and enterprise support centres, - employees of model screening centres and other health care institutions. 	<p>in particular elderly persons, and working out mechanisms of adjustment of upgrading qualifications of these persons to enterprise development resulting from the development of new technologies,</p> <ul style="list-style-type: none"> - identification of barriers in introduction of modern technologies and methods of management, - testing new methods of job retention – e. g. elderly employees as mentors, - dissemination of benchmarking methods as an opportunity to take advantage of experience of other Member States in the field of introduction of new technologies and developing qualifications thanks to the transnational cooperation, - seeking methods allowing not only to face the challenges connected with the development of enterprises but also to meet the needs of employees connected with family situation or health condition, constituting a barrier in retaining employment.
<p>Equality of labour market opportunities of women and men</p>	<p>Theme G</p>	<p>Measure 1.6 Vocational integration and re-integration of women:</p> <ul style="list-style-type: none"> - supporting women on the labour market, - development of the system for supporting women, - enabling the reconciliation of occupational and social roles. 	<ul style="list-style-type: none"> - women who have difficulties in finding a job, with low or outdated skills, - women returning to the labour market after a long break, - women from rural areas, - women with skills in non traditional professions, - women running or planning to start their own business, - social partners, NGOs. 	<ul style="list-style-type: none"> - focusing on testing the efficiency of hitherto forms of supporting economic activity of women (training, counselling, vocational guidance, standard activities in favour of women's entrepreneurship) - mechanisms will be developed to encourage women to start up business with the use of new technologies. EQUAL also complements SOP HRD measures aimed at promotion of by: - testing new methods of promotion and introduction of flexible forms of employment and work organisation , in particular as an instrument facilitating reconciliation of occupational and family life and maintaining economic activity in the course of break due to family responsibilities, - working out models of cooperation of local partners,

				<p>including NGOs and enterprises aimed at liquidation of barriers in access to care services and communication barriers,</p> <ul style="list-style-type: none"> - focusing on problems connected with women's work in grey economy and on working out mechanisms of transforming illegal work into legal employment, - working out mechanisms of retaining economic activity in the course of break in employment, - working out effective mechanisms of counteracting sex discrimination and mechanisms of monitoring law observance in this regard, - promotion of employee rights among employers, in particular the right to equal pay for work of equal value.
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ESF Policy Fields	EQUAL themes	Integrated Regional Operational Programme (IROP)		
		Priority 2 Measures	Target groups	Added value of EQUAL

<p>Development and promotion of active labour market policies</p>	<p>Theme A</p>	<p>Measure 2.3 Vocational reorientation of persons leaving agricultural sector by:</p> <ul style="list-style-type: none"> - training and courses aimed at upgrading vocational qualifications and skills to find employment outside agriculture, - subsidised employment, - job placement, - vocational information, - advisory services in the field of the choice of new occupation and acquiring new vocational qualifications, including individual action plans. <p>Measure 2.4 Vocational reorientation of the workforce affected with restructuring process by:</p> <ul style="list-style-type: none"> - training and courses aimed at upgrading skills and qualifications for a new job, - subsidised employment, - job placement, - vocational information, - advisory services in the field of the choice of new occupation and acquiring new qualifications and skills, including individual action plans. 	<ul style="list-style-type: none"> - farmers and household members working in agriculture intending to give up their activities - employees of traditional sectors and industries (mining, metallurgy, shipbuilding industry, light industry, chemistry industry, arms industry, employees of health sector, railway sector), - employees who were given redundancy notice due to company situation, - employees of a company which declared bankruptcy or in the process of liquidation. 	<ul style="list-style-type: none"> - extending the scope of target groups of measures 2.3. and 2.4 of IROP by including unemployed persons (in particular the long-term unemployed persons) and economically inactive persons, - focusing on activities in favour of vocational mobilisation with the use of modern ICT, which will allow to bridge the civilisation gap in these areas, - thanks to thematic approach EQUAL creates an opportunity of working out a complex approach to labour market problems in rural areas and areas subject to restructuring and thus contributing to avoid a fragmentary nature of activities aimed at supporting residents of these areas.
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<p>Promotion and development of training, education and guidance – lifelong learning</p>	<p>Theme A Theme F</p>	<p>Measure 2.1 Development of competencies linked to the labour market needs and lifelong learning opportunities in the region:</p> <ul style="list-style-type: none"> - support for vocational qualifications' development, - apprenticeship in enterprises facilitating to acquire practical skills and get acquainted with the specific character of future occupation for pupils of schools above the lower secondary level and students of higher schools, - research and analysis for the needs of the regional labour market. 	<ul style="list-style-type: none"> - pupils of the upper secondary schools (above gymnasium level) and vocational schools, - students of higher education institutions, - adult persons wishing to improve their professional qualifications, farmers and household members to be trained for diversification of activities outside, but close to agriculture, - agricultural counsellors, institutions engaged in monitoring regional market and education and training offers. 	<ul style="list-style-type: none"> - focusing on unemployed and economically inactive persons, experiencing labour market inequality and discrimination, in particular due to the low education level and low qualifications under theme A, aimed at adjusting qualifications to the labour market needs connected with the development of new technologies, - working out methods of motivating the most vulnerable groups to participate in lifelong learning and information society, - working out mechanisms of adjusting qualifications to the needs resulting from the development of enterprises, needs of persons threatened with the loss of job (in particular elderly persons), - promoting the idea of lifelong learning both among employees and employers, including dissemination of staff development strategies in SMEs, - working out new forms of training combined with practical training and getting acquainted with the specific character of a new occupation for employees threatened with the loss of job.
<p>Development of entrepreneurship and adaptability</p>	<p>Theme G Theme D</p>	<p>Measure 2.5 Entrepreneurship promotion:</p> <ul style="list-style-type: none"> - providing complex support to persons wishing to start up business, - dissemination of good practices and development methods. 	<p>Priority will be given to:</p> <ul style="list-style-type: none"> - those seeking to leave employment within the agriculture sector, - those working in traditional sectors and industries undergoing restructuring and others threatened by unemployment, - young people up to 25 not registered as jobless. 	<p>focusing on testing the efficiency of standard activities in favour of women's entrepreneurship and working out an effective systems of incentives for women to start up business in the field of services with the use of modern technologies (Theme G),</p> <p>testing new methods of support for setting-up social co-operatives as an instrument allowing to move from the second labour market (theme D),</p> <ul style="list-style-type: none"> - building the potential of the third sector by up-grading qualifications of employees in management of social enterprises (Theme D).

<p>Development of entrepreneurship and adaptability</p>	<p>Theme F</p>	<p>Measure 2.6 Regional Innovation Strategies and transfer of knowledge:</p> <ul style="list-style-type: none"> - development and adjustment of Regional Innovation Strategies, - the creation of a network of innovations transfer between R&D sector, enterprises and other actors at the regional and local level, - development of the system of communication and exchange of information, - transfer of knowledge from R&D sector to enterprises through apprenticeship of school graduates, R&D workers in enterprises, - scholarships for the best graduates of tertiary-level schools continuing education on doctor's studies in the field of new technologies, exact sciences and other directions used in development of industrial clusters, in accordance with RIS of the voivodship. 	<ul style="list-style-type: none"> - enterprises (in particular SME) including research and development units in enterprises, - higher education institutions, - research institutes, scientific institutes, branch R&D units, laboratories, centers of excellence and other development units, - participants of doctoral studies, - employees of research and development sector and higher education institutions graduates 	<ul style="list-style-type: none"> - complementing measures aimed at the development of communication and information system between R&D sector and enterprises thanks to the idea of partnership at national and European level, - dissemination of benchmarking methods as an opportunity to take advantage of experience of other Member States in the field of introduction of new technologies and developing qualifications thanks to the transnational cooperation.
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7. ACTIONS UNDER EQUAL

Community Initiative EQUAL will fund activities undertaken and implemented by Development Partnerships, which form three distinct implementation actions:

- the introductory phase – planning,
- DP implementation,
- thematic co-operation and dissemination of good practice.

The scope of particular actions, duration, milestones and tentative budget allocated to their financing are described below.

7.1 Selection of Development Partnerships

The introductory stage of the implementation of EQUAL starts at the moment of selection of potential Development Partnerships. There will be a single selection procedure which will be based upon an application submitted by Development Partnership promoters (hereinafter DP promoters).

The fundamental task of the EQUAL MA and the NSS is to provide clear and exhaustive information about the role of Development Partnerships in the implementation of the objectives of the Initiative EQUAL and the fulfilment of the set requirements. Proper performance of the tasks, assigned to the NSS, is one of the indispensable requirements to arouse interest in participation in the Initiative EQUAL among numerous potential DP promoters.

Potential DP promoters, interested in participation in the Initiative EQUAL, are obliged to present their DP proposal in the form of application submitted to the NSS. The terms of submitting applications and the criteria for selection of Development Partnerships are specified below.

7.1.1 Organisation and communication of call for proposals

Selection of the DPs to be implemented under the Community Initiative EQUAL shall be subject to call for DP proposals. Selection of Development Partnerships shall be made on the ground of the criteria specified in this programme in Annex 3 , and to be specified in more details in the Programme Complement. Taking into account a transnational character of the Initiative EQUAL and the necessity to enter the data on Development Partnerships into the European Community Database (ECDB) before January 1, 2005 according the *Communication*, call for DP applications shall be issued in the second quarter of 2004.

The invitation to competition shall be published at the same time in all the media appropriate to announce calls for implementation of the activities funded by public resources in accordance with national regulations. Information meetings, conferences, seminars for potential promoters on EQUAL programme will be also organised. The national launch event will involve public authorities (politicians) and selected target audiences.. A handbook for potential DP promoters shall be issued that will describe procedures and requirements to apply for the ESF. The responsibility for elaboration of the application procedures, information and promotion documents and training materials lies with the EQUAL MA which is supported in these tasks by the NSS.

The selection procedure of the Development Partnerships for EQUAL implementation consists of the following stages:

- announcement of the competition, stating the deadline to submit applications, the place of their submission, and the requirements that DP promoters should meet,
- assessment of the DPs by the Selection Commission,
- submission of a ranking list of potential Development Partnerships to the EQUAL MA and the EQUAL MC for final approval,
- informing Development Partnerships about the decision on granting funds for the implementation of EQUAL and contracting the Development Partnerships,
- setting up Development Partnership and transnational cooperation.

7.1.2 Guidelines for applications

Selection of the Development Partnerships will be based on the information included in the application, submitted by DP promoters. The application should include the following:

- the partners to be involved in the Development Partnership at the outset; the arrangements for ensuring that all relevant stakeholders can become involved during the life of the partnership including, in particular, appropriate small organisations; and the arrangements for handling the administrative and financial responsibilities,
- an outline of the rationale for the partnership, a diagnosis of the problem to be addressed, and an outline of the objectives of the partnership;
- an assessment of the relevance of the problem addressed and of the solution to be tested, an explanation of how discrimination and inequality will be tackled, and an outline of how the results could be disseminated and transferred to policy and practice,
- the expectations from transnational co-operation,
- an outline of the activities foreseen for developing and testing the innovative approach for the entire period, including an indicative budget (estimate),
- a detailed workplan, methodology and management tools for developing and finalising the Development Partnership Agreement, including budget.

On the basis of an application form there will be criteria in three categories elaborated:

1. Information questions (geographical focus, sector focus, contact details, etc.);
2. Eligibility questions (legal status etc.);
3. Assessment questions (purpose of the DP, the expected results, innovation, empowerment, transnationality, etc.).

The application will be registered in the information system SIMIK. In order to help in correct filling in the application form, a handbook shall be prepared, which will include all the basic information about the EQUAL Initiative, the principles of its implementation, and the set requirements for potential Development Partnerships. Additional information and counselling shall be provided by the NSS.

7.1.3 The process of selection

Selection Commission (SC) will be charged with eligibility check of potential Development Partnerships. The SC shall consist of representatives of the NSS. The SC evaluates the applications regarding formal criteria and eligibility. After formal assessment the applications shall be submitted to the independent experts specialised in the areas of the DPs. They will be members of the Project Appraisal Sub-commissions (PAS) which will be appointed by EQUAL MA and finally approved by EQUAL MC. DPs shall be evaluated by PAS according to the criteria distinctive for the EQUAL Initiative and the detailed criteria specific to each thematic field implemented under the programme.

Assessment will be made on the basis of the scoring system taking into account the strategic goals of EQUAL in Poland and be in line to the principles implied in the *Commission Communication*. General criteria reflecting the principles of EQUAL and requirements stated in the Commission's Guidelines as well as the criteria related to the themes are presented in Annex 3. The table containing a set of assessed questions relevant to the DP selection process and the minimum and maximum credit number for each question forms will be presented in the Programme Complement.

The Members of the PAS have equal votes. Each DP proposal will be evaluated by two experts who evaluate DPs proposals independently. Where assessment differ, the two experts will reassess the proposal together. In case of significant disparities in evaluation, the application is subject to evaluation by an additional independent expert.

After the SC has established, on the basis of PAS appraisal, a list of the DPs recommended for funding, the ranking list by theme shall be presented to the EQUAL MC and the EQUAL MA for a final approval and decision on the division of the funds.

As for the DP promoters, whose applications have been rejected by the PSC, the MA is obliged to inform them about the reasons for refusing to finance their DPs. The following principles will be applied to the whole appraisal process, in order to ensure that the integrity of the process is clear and visible. Details will be provided in the Programme Complement.

Appraisal process

Sound planning and a clear timetable:

The selection process will be underpinned by a well planned work programme and timetable, clearly communicated to all stakeholders in the process. It will be ensured that key staff are available to undertake the duties allocated to them within the agreed timeframe

Transparency:

The whole application process will be clearly documented and communicated to all interested actors, through information days, handbooks, application forms, guidance to applicants, conferences, seminars, workshops, helpline, , and so on.

Fairness:

The selection process will ensure equal treatment for all applicants, and will allow sufficient time (at least 3 months please check) for applicants to plan and prepare.

High quality feedback to all applicants:

A detailed written feedback will be provided to applicants at the end of the process.

Opportunity to appeal against decision:

Unsuccessful applicants will be given the right to appeal against their non-selection. The grounds for appeal, and the procedure, will be clearly stated.

Independence of assessors

Throughout the application process, provisions will be made for excluding conflicts of interests, or interventions by third parties.

Quality control

The Managing Authority will ensure quality control (involving a sound documentation of the procedures applied and results agreed) at all stages of the assessment process, as well as provisions to identify and correct a bias.

7.1.4 Agreements with Development Partnerships

When the EQUAL MA after consultation with the EQUAL MC has approved the DPs for funding, the MA authorises the NSS to issue the grant letters to DP promoters. The grant letter specifies the amount of the funds granted, and puts a given Partnership under an obligation to comply with the principles proper for this action. The decision shall be in a form of an agreement between MA and Development Partnership appropriate for granting subsidies from the public funds (financial contracts) including both the national co-financing and the ESF contribution.

It is expected that in the framework of EQUAL approximately 50 -120 Development Partnerships will be selected.

7.2 Setting up Development Partnerships and transnational cooperation (Action 1)

Once selected, expenses become eligible and Development Partnerships will be required to achieve 'milestones' in the operation of their work programme.

The initial milestone (*action 1*) is the creation or consolidation of a sustainable, effective Development Partnership and its strategy including transnational co-operation, which will have a real added value. The time period available for this will be determined by the quality and speed at which each Development Partnership achieves agreement with all partners on the draft Development Partnership Agreement (below). The draft Development Partnership Agreement should immediately be submitted to the NSS, which is responsible for assessing the content of each agreement before transmitted them to the EQUAL Managing Authority.

Development Partnership must identify at least one partner from another Member State. As a general rule, co-operation should be established between other Development Partnerships in EQUAL; such co-operation may also extend to similar projects supported in a non Member State eligible for funding under the PHARE, TACIS MEDA or CARDS programmes.

The draft Development Partnership Agreement documents the consensus of the partners and presents their common strategy in a structured, concise and coherent way, and identifies the main factors for success of the Development Partnership. Therefore it should contain:

- a diagnosis and an assessment of the specific problems in relation to labour market exclusion, discrimination and inequality, to be tackled;
- a stakeholder analysis; identifying and discussing the interest and expectations of people, groups, or organisations that may influence or be influenced by the solution to be developed and tested, and a description of the roles of relevant stakeholders in the work of the Development Partnership;

- objectives and the strategy to attain them, reflecting learning from the first round of EQUAL and any other relevant action;
- a description of the assumptions, risks and flexibility requirements;
- a detailed work programme accompanied by a realistic budget, both broken down by national and transnational activities/costs;
- a clear identification of the role of each partner, including the arrangements for steering and managing the partnership and administering the financial support preferably using a commonly agreed system;
- a Transnational Co-operation Agreement specifying the common interests, the added value of the transnational activities, and the transnational workplan and budget. The contributions and roles of each transnational partner, the methods of decision making and the organisational arrangements for implementing the common work programme as well as the methodologies for monitoring and assessment of joint activities should be set out. This Transnational Co-operation Agreement must be presented on the basis of the common format described in the Guide on Transnationality¹⁷, and must be entered into the common database 'EQUAL transnational co-operation internet module' (ETCIM). A paper version of the database entry should be annexed to the draft Development Partnership Agreement.
- the methodology and mechanism for on-going assessment of activities and achievements, including a description of verifiable indicators which demonstrate how the objectives, outputs and results will be measured and assessed ;
- the corresponding methodology and mechanisms for monitoring and assessment of joint activities in the transnational co-operation;
- the commitment of the Development Partnership including their transnational partners to collaborate on making an impact on policies activities at national and European levels;
- the strategy and mechanisms for implementing a gender mainstreaming approach.

The draft Development Partnership Agreement must also demonstrate that the Development Partnership fulfils the following conditions:

- Transparency: Public access to the results obtained (products, instruments, methods, etc.).
- Capacity-building and empowerment: The Development Partnership has the capacity to mobilise and enable different actors to work together effectively around their common strategy. Particular attention will be given to the arrangements for ensuring that all relevant actors, such as: public authorities; the public employment service; NGOs; the business sector (in particular small and medium sized enterprises); and the social partners, can become involved during the life of the partnership. The Development Partnership must show that all partners have fully participated in the planning and development of the Development Partnership Agreement.
- Learning spirit: the capacity and willingness to learn from others, and to actively co-operate in networking, dissemination and making an impact on policy and practice activities at both national and European level.

¹⁷ http://europa.eu.int/comm/employment_social/equal/index.cfm?file=listdoc.cfm&nav_id_menu=10038&lang_id=6

National Support Structure acting under the responsibility of Managing Authority will provide sufficient support to enable Development Partnerships to conclude their draft Development Partnership Agreement as quickly as possible, and in sufficient quality. Failure to submit a draft Development Partnership Agreement will lead to de-selection, after which expenditure will no longer be eligible.

It is expected that activities undertaken under preliminary phase will go on as long as it is necessary to establish an effective Development Partnership and its budget will be about 3 % of the total amount available under the programme.

7.3 Implementation of the work programmes of Development Partnerships (Action 2)

Upon receipt of the draft Development Partnership Agreement, Managing Authority will confirm, normally within 8 weeks, the initial selection of the Development Partnership, including the multi annual budget available to implement the work programme (*action 2*).

Subsequent milestones relate to a review of the implementation of the work programme as set out in the Development Partnership Agreement. Where there is a financial consequence to the non-performance of activities, Managing Authority may realign the budget accordingly. The National Support Structure will carry out the, at least, at 12 month intervals.

The maximum budget for financing the activities undertaken should not exceed 75% of the total budget allocated to implementation of the programme.

7.4 Thematic networking, dissemination and mainstreaming

The success of implementation of EQUAL program depends on the ability to use the results and experiences of the Development Partnerships to inform and influence policy –making and practice. For this reason emphasis is placed on early dissemination and mainstreaming. In this process all stakeholders involved in implementation of EQUAL should cooperate from the early phase of programme implementation.

The process of sharing information and exploiting the results of innovation is very crucial for EQUAL and to achieve this three kind of measures on three levels will be undertaken:

- Thematic networking,
- Dissemination,
- Mainstreaming.

The EQUAL MA is responsible to identify emerging policy issues and developments and to facilitate their maximum effect on the market and employment policy, as well as on the involvement of social partners. In performance of this task EQUAL MA will be assisted by the NSS, which supports the efforts of Development Partnership aimed at disseminating results of implemented DPs, coordinates works in thematic networks at the national level.

7.4.1. Thematic networking

The Managing Authority will ensure that networks will be created on the basis of thematic activities and horizontal issues on national and European levels. These networks bring Development Partnerships together to discuss and evaluate the most promising practices and outcomes of the work and to prepare their dissemination and integration to the polices and practice.

Development Partnership level

Development Partnerships participate in National Networking Groups and European Thematic Groups in relation of chosen theme by validation, dissemination and sharing their experiences concerning effective strategies to combat discrimination faced by a specific disadvantaged group.

The cooperation will support:

- thematic reviews of the strategic approaches and the results achieved,
- identification of good practice, particularly relevant to the priorities of the National Employment Action Plan,
- dissemination of good practices into Europe-through discussion fora.

Development Partnership take part and contribute to these networks as part of their commitment to transnationality and as an integral part of their work plan. All expenses related to the participation in networks are considered eligible.

National level

EQUAL MA, through assistance of NSS, supports the thematic review process. With the purpose to advance the assessment, benchmarking, delivery and implementation of good practices from EQUAL, NSS will organise conferences, seminars and working groups. EQUAL MA and NSS could also cooperate in transnational dialogue by leading the thematic and horizontal groups or taking part as member in the Steering Group which is responsible for development and implementation of the work programme and activities.

European level

European Thematic Groups are set up to help share good practice across the European Union. Their primary objectives are the following:

- identification of good practices across each of the EQUAL themes,
- identification how it fits with emerging EU policy,
- development of an effective dissemination strategy to ensure that the wider audience is aware of and can act on the lessons from EQUAL.

The representatives of the National Networking Groups are also involved in the European network and the national delegates are intermediaries between national and European thematic networks.

Thematic networks are not restricted to Development Partnerships. They are also open to other actors involved to the process of dissemination and mainstreaming. They can include representatives from the Commission, parliamentary committees, social partners, regional authorities and national experts. Related travel costs will be covered from the national Technical Assistance budget.

7.4.2. Dissemination

Dissemination is concerned as the spreading of information to individuals and organisations and it aims to provide knowledge about the context, design, development, delivery and impact of the activities undertaken in the frame of EQUAL. There are many ways to disseminate information, including:

- press releases,

- newsletters,
- executive summaries,
- research findings,
- evaluation reports,
- audio-visual materials,
- websites,
- events,
- conferences,
- seminars or workshops,
- discussion or focus groups.

EQUAL MA, NSS and Development Partnerships are the main groups responsible for dissemination under EQUAL. Dissemination strategy is a compulsory element of DP work plan.

The NSS shall also be responsible for drawing up a draft of national strategy for the dissemination and mainstreaming of EQUAL results, which shall require approval of the EQUAL MA and the EQUAL MC.

Dissemination of results is one step in the process of mainstreaming.

7.4.3. Mainstreaming

In accordance to the principles of EQUAL the main challenge of the mainstreaming is the integration and incorporation of a new ideas and approaches into policy and practice. In order to ensure the real impact of the results of the programme mainstreaming should starts from the beginning of the implementation.

One of the objectives of the Community Initiatives in general and EQUAL in particular is the concept of mainstreaming. It is important to differentiate between the mainstreaming of *good practices* through Development Partnerships and transnational co-operation and the mainstreaming of *innovative new methodological / policy approaches* developed / piloted through the EQUAL programme into *national social and employment policies*. At a horizontal level, the principle of gender mainstreaming will also be followed throughout EQUAL.

Development Partnership level

It is a obligation on Development Partnership to participate in mainstreaming activities as part of their work programme. It is also possible to apply for additional funding which can be used for mainstreaming the innovations of EQUAL (either from the first round or the second) or additional mainstreaming activities such as preparation of guides, good practices or other tools by Development Partnerships as part of the collaboration within European thematic groups. Development Partnership can act separately or in group.

National level

For the needs of the programme EQUAL MA will establish a mainstreaming strategy describing mechanisms which will facilitate mainstreaming activities at local, regional, national and European level. These mechanisms should aim at:

- Identifying factors leading to inequality and discrimination and monitoring and

analysing the impact or potential impact of the DP's on the priorities and on the different grounds of discrimination and inequality in connection with the labour market,

- Identifying and assessing the factors leading to good practice and benchmark performance,
- Disseminating good practice from DP's.

Implementation of the mainstreaming strategy which detailed description of national mechanisms (aiming at meeting the mainstreaming objectives in both the horizontal and vertical dimension) will be presented in the Programme Complement will start after its formal approval by EQUAL MC. EQUAL MC will take an active part in drafting the document.

The main objectives of the mainstreaming should ensure the contribution:

- in the horizontal dimension: organisations and institutions active in the same or similar field,
- in the vertical dimension: regional and national policy, including the National Action Plan and Structural Funds' mainstream programmes.

The organisations and institutions participating in the implementation of the ESF mainstream programmes should be involved in the process of mainstreaming EQUAL by the following activities:

- organising at least once a year, joint forum for the members of the Monitoring Committees of the structural fund programmes, particularly SOP HRD and IROP with the Members of the EQUAL MC,
- organising annually the ESF seminars,
- participation in the thematic networks,
- providing specific information in the National Action Plans.

European level

The results of EQUAL will be mainstreamed across all of the structural funds and others policies of the European Commission. For ensuring a maximum impact Commission will continue to provide access to good practices via learning platform of EQUAL through web site.

A maximum share of the funds available for Development Partnership under this action will amount to ca 15% of the total amount allocated under the programme.

7.5 Technical assistance

Technical assistance will be available to support the implementation of the programme by rendering services to the EQUAL Managing Authority and Development Partnerships, and for monitoring, auditing and evaluation of the activities both at the level of Member States and at European level.

Technical Assistance is available to support the implementation of EQUAL and may provide support before the commencement of Development Partnerships activities. Technical assistance is available to the following activities supporting sound programme implementation according to *Regulation 1145/2003/CE*; rule 11.2:

- expenditure relating to the preparation, selection, appraisal and monitoring of the assistance and of operations (but excluding expenditure on the acquisition and installation of computerised systems for management, monitoring and evaluation);

- expenditure on meetings of monitoring committees and sub-committees relating to the implementation of assistance. This expenditure may also include the costs of experts and other participants in these committees, including third-country participants, where the chairperson of such committees considers their presence essential to the effective implementation of the assistance;
- expenditure relating to advice and support of individual DPs in technical, methodological and thematic (content related) matters,
- expenditure relating to audits and on-the-spot checks of operations.

Other activities of technical assistance according to *Regulation 1145/2003/CE*; rule 11.3:

- studies, seminars, information actions, the collection, editing and dissemination of the experience and results;
- support to thematic networking, dissemination activities and the setting up of mechanisms for policy impact;
- co-operation in European networking and ensuring the sharing of all relevant information with other Member States and the Commission
- evaluation,
- the acquisition and installation of computerised systems for management, monitoring and evaluation.

Technical assistance may provide support before launch of Development Partnerships activities.

On the basis of the above-mentioned thematic scope of technical assistance, and in compliance with the Regulation No 1685/2000 on the detailed principles of implementation of the Regulation No 1260/1999 on the coverage of expenses of activities co-financed by structural funds, activities undertaken under technical assistance have been grouped and presented in the table below. All activities listed in the table will include all categories of costs, where appropriate (salaries, travel, running costs, low-value assets, costs for external services, office and telecommunications costs, depreciations and overheads). The procurement of goods and services will be carried out in line with national and European legislation.

Category of technical assistance

Category of expenditures	Type of activities	Indicative budget
<i>Activities supporting sound programme implementation according to Regulation 1145/2003/CE; rule 11.2</i>		4.5%
<ul style="list-style-type: none"> ▪ expenditure relating to the preparation, selection, appraisal and monitoring of the assistance and of operations (but excluding expenditure on the acquisition and installation of computerized systems for management, monitoring and evaluation); ▪ expenditure on meetings of monitoring committees and sub-committees relating to the implementation of assistance; ▪ expenditure relating to advice and support of individual DPs in technical, methodological and thematic matters; ▪ expenditure relating to audits and on-the-spot checks of operations. 	<ol style="list-style-type: none"> 1) establishment of a monitoring system for EQUAL, 2) Organisation of meetings of the Monitoring Committee and of Evaluation steering group within the Monitoring Committee, their secretariat and expertise, 3) Support in handling proposals, assessment of proposals, and support of the work of Selection Committee (secretary and expertise), 4) training of DPs related to management and implementation of their work programme, 5) Preparation of methodological tools for DP's related to management, implementation, monitoring, mainstreaming, and transnational cooperation, 6) guidance to DPs in setting up partnerships, and achieving the milestones of their work plans, 7) support to DPs in establishing transnational partnerships, and in effective transnational co-operation, 8) support to DPs in strategy development, planning, monitoring and self-assessment of their activities and achievements, 9) support to DPs in organisational and financial aspects, 10) support to DPs in horizontal and vertical mainstreaming, 11) verification of payment claims, 12) audits and on the spot checks, 13) preparation of call (s) for tenders for external service providers, 14) preparation of annual reports to the Commission, 15) collecting information requests by the Commission or national administration. 	

<p><i>Other activities of technical assistance according to Regulation 1145/2003/CE; rule11.3</i></p>		2.5%
<ul style="list-style-type: none"> ▪ studies, seminars, information actions, the collection, editing and dissemination of the experience and results, ▪ support to thematic networking, dissemination activities and the setting up of mechanisms for policy impact; ▪ co-operation in European networking and ensuring the sharing of all relevant information with other Member States and the Commission; ▪ evaluation; ▪ the acquisition and installation of computerised systems for management, monitoring and evaluation. 	<ol style="list-style-type: none"> 1) preparation and dissemination of general information about EQUAL activities through seminars, publications, media; according to the EQUAL strategy for information and publicity; 2) development of guidelines and support materials for DP; 3) support to develop, monitor and implement a national mainstreaming strategy; 4) organisation of seminars, workshops and conferences related to the identification, validation and dissemination of good practices; 5) support to establishing and running national thematic network; 6) organisation of conferences related to mainstreaming activities; 7) participation in European meetings; 8) organisation of information and exchange visits at national and transnational level; 9) support in comparative assessment of results; organisation of peer reviews, support in benchmarking; 10) external programme evaluation (tender); 11) acquisition and installation of computer software and hardware necessary for management, monitoring and evaluation. 	

The resources for ensuring activities related to technical assistance will represent ca 7 % of the total budget of the programme.

Activities under technical assistance will account for ca 7% of the total budget.

7.6 Calendar of EQUAL implementation

Taking into account the agenda of the implementation of the second round of EQUAL and for ensuring that all data on Polish DPs will be entered into the ECDB before January 1, 2005. EQUAL MA take the whole responsibility that call for proposal will be published in the proper time as well as the contracts with DP's will be concluded. The indicative schedule for the preparation and implementation of EQUAL in Poland is presented below. All necessary information related to the selection process and implementation of the EQUAL will be disseminated through the Programme Complement and Handbook for the DPs applicants.

The table below shows an indicative¹⁸ schedule of the preparation and implementation of the second round of the Community Initiative EQUAL in Poland.

Activity	Deadline
<i>Programming</i>	
The EQUAL MA submitted CIP EQUAL preliminary version to the Commission	15 September 2003
The EQUAL MA submitted draft of CIP EQUAL to the Commission	30 September 2003
The EQUAL MA submitted draft of CIP EQUAL Programme Complement to the Commission	31 October 2003
The EQUAL MA and the Commission negotiate submitted CIP EQUAL	November 2003 –April 2004
The EQUAL MA submit to the Commission the final version of CIP EQUAL and Programme Complement	April 2004
<i>Implementation of Action 1 and Action 2-3</i>	
The second round of the Community Initiative EQUAL is launched	May 2004
Deadline for submission of application forms	August 2004
Applications are selected	September 2004
Grant letters sent (eligibility period starts)	October 2004
Trans-nationality window is opened	1 st January 2005
Implementing individual DPs starts	as soon as the DPs are ready

¹⁸ Presented deadlines are only of the approximate character and may go under changes.

Implementing individual DPs ends	August 2007 – August 2008
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8 IMPLEMENTATION OF THE EQUAL COMMUNITY INITIATIVE PROGRAMME

This chapter describes the actors at the national level, including Managing Authority, Paying Authority and monitoring institutions, as well as technical assistance involved in the implementation of the Community Initiative EQUAL in Poland. It presents also the concept of Development Partnerships in a specific context of this programme, as well as mechanisms ensuring their establishment.

8.1 National authorities competent for the Community Initiative EQUAL

8.1.1 Managing Authority

According to *Art. 9* of the *Regulation 1260/99/EC* introducing general provisions for structural funds, the Department for ESF Management in the Ministry of Economy, Labour and Social Policy plays the role of Managing Authority of the Community Initiative EQUAL (hereinafter EQUAL MA).

The EQUAL MA has overall and final responsibility, at national level for the management and the implementation of EQUAL. The responsibility of the EQUAL MA rest on performing the tasks assigned in the *Regulation* in such a manner that would secure efficient and correct implementation of EQUAL, and in particular:

- preparation of the programme documents: Community Initiative Programme for EQUAL and the Programme Complement,
- adjustment of the Programme Complement, if necessary, and after approval by the Monitoring Committee to inform Commission of the adjustment within one month,
- preparation of the ex-ante evaluation and on-going evaluation of the programme,
- supervision and support the technical assistance activities carried out by EQUAL National Support Structure (hereinafter NSS),
- plan and administer the European Community Initiative EQUAL Technical Assistance measures and, in this context, define the objectives of the National Support Structure, approve its annual work plan and supervise the quality and final delivery of its work;
- assuring and operating EQUAL monitoring and evaluation system in accordance with relevant regulations and the provisions of the CIP,
- providing the information system the data collected on the implementation and forwarded the data to the Commission by computer-based data exchange,
- provision of services to the Monitoring Committee,
- ensuring compliance of the DPs implemented with the national and community policies,
- drawing up the promotion and information strategy of the programme and implement public information actions according to the Art. 46 and Art. 34 (1) (h),
- draft a mainstreaming strategy specifying the framework and mechanisms for validating the results of EQUAL and transferring it into policy and practice, and for ensuring that EQUAL meets relevant policy needs,
- approval of DPs selection on the basis of ranking list submitted by EQUAL MC
- approval of Development Partnership Agreements and Transnational Cooperation Agreements,

- ensuring the national contribution and providing the co-financing to the Development Partnerships,
- ensuring that those bodies taking part in the management and implementation of EQUAL maintain a separate accountancy system for Community funds and adequate accounting code for all transactions connected relating to the assistance (*art. 34.1 (e) 1260/99/EC*),
- ensuring the correctness of operations financed under EQUAL, in particular by introduction of the management system (in the area of finance in compliance with guidelines of the Ministry of Finance) (*art. 34.1 (f) 1260/99/EC and chapter II of the 438/2001 as amended by 2235/2002*),
- checking the statements of expenditures received from the NSS, and certifying them for the Paying Authority,
- verifying payment applications submitted by the NSS, their approving and providing to the Paying Authority together with appropriate certification of the correctness of expenses,
- preparation of reports on irregularities to be subsequently presented to the Bureau for International Treasury Relations in Ministry of Finance, which is responsible for reporting irregularities to EC and presented to the CSF Managing Authority and to the Paying Authority,
- drawing up the long-term and annual forecasts of expenses (payments) under EQUAL classified into national means and ESF resources, and their submission to the Paying Authority,
- ensure compliance with Community policies and rules, notably on equal opportunities, state aid and public procurement;
- implementing management and control systems based on the procedures described in the article 4 of the Regulation 438/2001 as amended by 2235/2002. These systems should ensure verification of payment applications, including all forms of co-financing, their approval and transferring to Paying Authority together with appropriate endorsement of the eligibility of expenditures
- Ensuring correctness of the EQUAL related financial operations by introducing the proper management and control system (in financial scope, according to the Ministry of Finance guidelines and Monitoring Committee motions for undertaking remedial action); this system must fulfil requirements specified in the Chapter II of the Regulation 438/2001 as amended by 2235/2002;
- Ensuring that there exists a sufficient audit trail of all expenditures and co-financing in all relevant bodies according to Article 7 of Reg. 438/2001 as amended by 2235/2002.
- ensuring that all documentation relating to programme implementation will be kept at least within a period of 3 years from the date of last payment made by the European Commission under EQUAL

8.1.2 Paying Authority

According to *Art. 9 of the Regulation 1260/99/CE*, the Foreign Assistance Funds Department in the Ministry of Finance plays the role of Paying Authority for the Community Initiative EQUAL (hereinafter PA), as well as for other operational programmes and the Cohesion Fund.

Among the duties of the PA it belongs in particular:

- administration of the account on which ESF resources are kept,
- verification of the declaration of expenses from ESF submitted by the EQUAL MA,
- certification of applications for funds for the European Commission, payments, registers and financial control,
- submission to the European Commission an updated forecast of expenses for the current budget year and a prognosis for the next year, not later than on 30 April each year,
- keeping an account of amounts recoverable from payments of Community assistance and drawing up reports on financial irregularities according to provisions in Article 8 of Regulation 438/2001 as amended by 2235/2002.,
- collection of statistical and financial information about the programme.

Moreover, one of the tasks of the PA is to prepare guidelines for financial management and financial control, as well as monitoring and control over their following by the EQUAL MA and the NSS, which performs technical assistance tasks.

8.1.3 Monitoring Committee

In accordance with *Art. 35 of the Regulation 1260/1999/CE*, the Monitoring Committee for the Community Initiative EQUAL (hereinafter EQUAL MC) is responsible for supervising the implementation of EQUAL in Poland. EQUAL MC must be set up after the European Commission approving the Community Initiative Programme for EQUAL.

The scope of the tasks of the EQUAL MC shall in particular cover:

- confirmation of changes in the EQUAL CIP,
- confirmation or adjustment of the Programme Complement including the physical and financial indicators to be used to monitor the assistance; its approval must be obtained before any further adjustment is made,
- approval of the evaluation strategy ,
- approval of the information and communication strategy,
- approval of the technical assistance tasks and expenditures by propose to the EQUAL MA any adjustment or review of the assistance likely to make possible the attainment of the objectives or to improve the management of assistance, including in respect of financial management, any adjustment to the assistance shall be made in accordance with Article 34(3),
- approval of the thematic networks,
- consideration and approval of the DPs selection criteria,
- approval of experts nomination for Project Appraisal Sub-committee,
- assessment of the DPs selection on the basis of the ranking list submitted by EQUAL MA,
- examination of evaluation reports of implementation, particularly achievement of the targets set for selected themes,

- reviewing and approval of the annual reports on the programme implementation and the final report, drawn up by the EQUAL MA before they are sent to the European Commission.
- consideration and approval any proposal to amend the contents of the Commission decision on the contribution of the ESF,
- approval of the mainstreaming strategy.

The EQUAL MC shall be appointed in compliance with the partnership principle and it shall specify its own task scope, which will be reflected in its rules of procedure, which will be fixed during its first meeting. The Minister of Economy, Labour and Social Policy or a person appointed by the Minister shall act as a chairman. The Committee Secretariat shall be staffed and secured by the Department for ESF Management, EQUAL MA, which shall be also responsible for organisation of the meetings of the Committee, preparation of the materials for its meetings, as well as for keeping reports from its meetings.

The EQUAL MC shall consist of the representatives of the institutions and organisations whose participation is necessary to ensure the Committee influence on the policy. Apart from the representatives of the EQUAL MA, the PA and the NSS as observer, one should mention representatives of national public authorities as well as other institutions involved in the counteracting discrimination and inequality on the labour market, self-government authorities, social partners, experts, NGOs and the European Commission as an observer.

In compliance with the partnership and empowerment principle the composition of EQUAL MC shall in particular include one representative from:

- Ministry proper for regional development, responsible for CSF,
- EQUAL MA, Ministry of Economy, Labour and Social Policy,
- Paying Authority - Ministry of Finance,
- ESF Monitoring and Eligibility Control Unit,
- Ministries and Offices involved into the programme:
 - Ministry of National Education and Sport,
 - Ministry of Scientific Research and Information Technology,
 - Ministry of Interior and Administration,
 - Ministry of Agriculture and Rural Development,
 - Plenipotentiary of State for Equal Status of Women and Men,
 - National Fund for Rehabilitation of Disabled People,
 - Polish Agency for Entrepreneurship Development,
 - Office for Repatriates and Foreigners Affairs,
- Representatives of local and regional authorities convention:
 - Voivodship Labour Offices,
 - Regional Governmental Administrations,
 - Regional Self-Governmental Administrations,
 - Association of Polish Poviats,
- Representatives of social partners:

- Representatives of the Tripartite Commission for Social and Economic Affairs:
 - employers side,
 - trade unions side.
- Representatives of non – governmental organisations.

The composition of the EQUAL MC will be described in details in the rules of procedure in the Programme Complement.

The membership of the EQUAL MC shall comply with the gender equality and equal gender representation principle. The meetings of the Monitoring Committee shall be held at least two times a year.

EQUAL MC can, according to the needs, create sub-committees and working groups.

The members of the EQUAL MC, beside participation in formal meetings of the Committee, shall also take part in the mainstreaming process. The meetings of the Committee could be connected with presentations of, or visits to Development Partnerships.

8.1.4 National Support Structure

8.1.4.1 Arrangements for selection of the NSS

In compliance with Art. 6 of Council Directive 92-50, the order of the Minister of Economy, Labour and Social Policy intends to appoint the Cooperation Fund Foundation as National Support Structure, which has been given an exclusive right to carry out specific activities related to Technical Assistance as described above, except programme external evaluation, pursuant to an administrative provision compatible with the Treaty.

If technical assistance services need to be carried out by other experts or organisations, under subcontract from the National Support Structure, the rules for public procurement will be applied.

The aim of the NSS is to assist the EQUAL MA with these tasks by providing professional services and supporting the implementation of the programme.

In order to carry out these tasks, the National Support Structure will:

- establish EQUAL support mechanisms to provide comprehensive advice, guidance and support to potential partners participating in the EQUAL programme, to DPs and their networks;
- develop and support the implementation of a national mainstreaming strategy;
- develop and implement the EQUAL communication plan;
- commission EQUAL related studies, and organise EQUAL events;
- establish a quality management system for technical assistance services.

The NSS is financed by the technical assistance budget available through EQUAL funds.

8.1.4.2 Tasks of the NSS

For ensuring good assistance to EQUAL MA the task of NSS shall include but not limited to the following:

- a) Support to the EQUAL MA in:
 - drawing up and implementation of the promotion and information strategy of the programme, organisation of the call for proposals and selection process,

- receipt and eligibility check of DP proposals,
- assessment of DP proposals with external help of specialised experts,
- preparing contracts with selected Development Partnership
- assessment of the Development Partnership Agreements,
- collecting data for monitoring and evaluation of the programme implementation at national level,
- monitoring, including in situ visits, of the activities and achievements of DPs,
- assisting in updating the European Monitoring System including data collection, at least on quarterly basis, for the ECDB,
- preparation of the reports on the progress of implementation of the Community Initiative EQUAL according to the national regulations,
- preparation of the annual reports on the implementation for the needs of the European Commission,
- ensuring the correctness of financed operations, in particular by introduction of the management and control system (in the area of finance in compliance with guidelines of the Ministry of Finance and Monitoring Committee's recommendations to initiate correcting actions,
- verification and confirmation of expenditures incurred by Development Partnerships to EQUAL MA,
- submitting and confirmation of payment applications (statements of expenditures) to EQUAL MA,
- drawing up, at least on a quarterly basis, report of EQUAL implementation and its submission to EQUAL MA,
- collecting information on any irregularities and their submission to EQUAL MA; drawing up an annual report of irregularities in programme implementation,
- drawing up an annual forecast of expenses (payments) from ESF and their submission to EQUAL MA,
- making, on a basis of presented and verified documents, payments (refund of incurred expenditures) in favour of Development Partnerships,
- playing role of Secretariat for Thematic Networks,

b) Support to the Development Partnerships:

- provision of information to potential applicants, including development of information and guidance materials concerning the EQUAL Initiative and transnational projects management,
- organisation of national and regional seminars and information events,
- distribution of application forms,
- helping to set up Development Partnerships in the search for national and transnational partners,
- assisting with making Transnational Cooperation Agreement,

- providing to Development Partnerships services on management of the projects, monitoring, evaluation, communication activities;
- support in implementation of mainstreaming strategy and dissemination of good practices,
- training and providing to Development Partnerships a pool of experts needed to ensure impact of EQUAL,
- support in creation and co-ordination of the thematic networks at the national level.

The National Support Structure will base its activities on a rolling annual workplan, endorsed by the Managing Authority after consulting of the Monitoring Committee. It will ensure sound implementation of its task, ensuring competence and quality. It will implement a sound system to document and to verify real costs/expenditure actually paid, in line with the provisions of Art. 32 of Regulation 1260/1999.

In order to ensure the delivery of professional services, the National Support Structure will assign staff with the required skills and experience, organise an on-going training, and promote training visits/short-term secondments to other National Support Structures notably in the fields listed above. It will agree, with the Managing Authority, on a quality control system for the services rendered.

The Managing Authority will ensure that technical assistance will be guaranteed by the beginning of May 2004 and the NSS supposed to be fully operational by the end of May 2004.

8.1.5 Arrangements relating to control

The Community Initiative EQUAL is controlled under the principles laid down in Regulations 1260/1999, 438/2001 as amended by 2235/2002, 448/2001. The Managing Authority will describe its management and control systems in the document to be submitted according to Art. 5 of Reg. 438/2001 as amended by 2235/2002.

8.1.6 The role of the Paying Authority

The tasks of the Paying Authority include drawing up guidelines on financial management and control as well as supervision and control of their implementation in the EQUAL MA and in programme management. These solutions ensure that ESF resources reach Development Partnerships as soon as possible (according to art. 32.1. of *Regulation 1260/1999* and *art. 9 of Regulation 438/2001 as amended by 2235/2002*).

8.1.7 The role of the ESF Monitoring and Eligibility Control Unit

The ESF Monitoring and Eligibility Control Unit has been created within the structure of the MoELSP. It will be independent from the organisational and functional standpoint.

The tasks of the ESF Monitoring and Eligibility Control Unit shall include:

- data collection, check and control of expenditures in EQUAL,
- monitoring and control of expenditures' eligibility within EQUAL,
- control of obedience of fixed procedures and principles, as well as the system of providing assistance from EQUAL at all levels of programme implementation (Development Partnerships, NSS, EQUAL MA),
- submitting, on a basis of quarterly reports of the EQUAL MA, the annual reports of ESF implementation for the needs of the CSF Managing Authority, Paying Authority, National Monitoring Committee and the European Commission,
- co-operation, under the principles of expert participation, in planning and in-depth control, including determination of a sample for random inspection of DPs implemented under EQUAL,
- keeping all documentation relating to implementation under EQUAL at least within a period of 3 years from the date of last payment made by the European Commission under EQUAL.

8.1.8 In-depth control

An in-depth inspection, as defined in *Art. 10 – 12 of the Regulation 438/2001 as amended by 2235/2002*, is conducted by the treasury control. An in-depth inspection shall entail among others:

- verifying efficacy of the managing and control systems applied,
- checking at least 5% of the eligible expenditures on the basis of risk analysis at various examined levels.

An in-depth inspection shall be conducted by 16 Treasury Control Offices (TCO). The Bureau for International Treasury Relations (Bureau for ITR) of the Ministry of Finance is responsible for its co-ordination, including a representative sample (selected on the base of criteria stipulated by *art. 10.3 of Regulation 438/2001 as amended by 2235/2002*), the inspection methodology, systematisation of the results and their presentation to relevant national bodies and the EC.

8.1.9 The Bureau for International Treasury Relations (Bureau for ITR)

The ITR is responsible for development of a general plan of audits for all treasury control offices. During the planning period, the monitoring and eligibility control unit for the ESF shall be invited to co-operate in an expert function. .

The general plan includes the basic scope of investigation and guidelines for the TCOs in respect of examination of at least the 5 per cent of eligible expenditure. Audit is carried out by examination of a representative sample of approved operations. The ITR supervises 5 per cent controls and casual audits and gets feedback information on them from the TCOs.

TCOs are committed to apply the ITR interpretation of expenditure eligibility. The ITR consults the ESF monitoring and eligibility control units in respect of eligibility of expenditure under the EQUAL CIP. Verified information on eligibility is then circulated to all TCOs. This should ensure the uniform interpretation and application of eligibility rules.

The ITR provides the EC with information on detected irregularities in consistence with principles laid down in the treasury control act. The ITR is responsible for the consistence of audits carried out by TCOs with standards.

Treasury Control Offices (TCO)

Treasury Control Offices task connected with sample checks on operations is carried out by EU funds units within the TCO's. Entities involved in structural fund flows and management in regions are controlled by TCOs in respective voivodships.

Co-ordination of audits and supervision (including standardisation of procedures) is executed by the ITR.

TCOs examine systematically at least 5% of eligible expenditures on the basis of risk analysis at various examined levels., taking into account provisions of Article 10 and criteria listed in Article 11 of Reg. 438/2001 as amended by 2235/2002, and carry out on-going audits.

Individual TCOs develop detailed audit plans at regional level consistent with the general plan drawn by the ITR. Developed detailed audit plans are submitted to the ITR. ESF monitoring and eligibility control unit can participate in planning, on an expert participation basis.

TCOs execute the a/m tasks, commissioned by the ITR in line with the guidelines developed by the ITR. TCOs develop audit plans, which will be detailed plans of specific audits, identifying the objectives, scope and techniques.

In EQUAL CIP implementation, TCOs exercise immediate control over the ESF Monitoring and eligibility control unit, the Paying Authority, the EQUAL Managing Authority, National Support Structure. When checking systems, TCOs examine, whether all the ESF entities involved in the implementation apply correctly procedures, which ensure efficiency of the management and control systems, and whether these procedures actually ensure efficiency and effectiveness of these systems.

At every examination of the 5 per cent of expenditure TCOs check whether excerpts from expenditure cover solely those expenditure:

- which were actually borne during the implementation period defined in the decision and which are eligible and supported by paid invoices or other accounting documents of equivalent value of evidence,

- which were borne on measures selected for funding under a specific project, in line with selection criteria and procedures.

8.1.10 *The issue of a declaration on winding-up of the assistance under EQUAL*

The declaration on winding-up of the assistance under EQUAL, issued in compliance with Art. 38.1.f of the Regulation 1260/1999/EC, belongs to the of competence of the General Inspector of Treasury Control , being an independent body from the Paying Authority, EQUAL MA and the NSS. The General Inspector of Treasury Control performs these tasks with the help of a organisational unit established for these purposes in the Ministry of Finance – the *Body for issuing declarations on winding-up of the EU assistance*.

The *Body for issuing declarations on winding-up of the EU assistance* issues declaration based on:

inspection of the system of management and control in the institutions engaged in the process of management and implementation of EQUAL,

the results of the previous checks conducted by the Treasury Control Offices 5% checks; and, when required, further sample checks of transactions (in compliance with Art. 15-16 of the Regulation 438/2001 as amended by 2235/2002).

Declaration will be drawn up on the basis of the indicative model in Annex III to the Regulation 438/2001 as amended by 2235/2002.

Body for issuing declarations on winding-up of the EU assistance shall take all necessary measures to reach justified certainty that the certified statements of expenditure are correct and the transactions are legal and regular. It issues a certificate together with a report that contains all essential information required for substantiating the certificate, and with a balance of the results of all checks conducted by the Treasury Control Offices. If the presence of important management or control faults or the high frequency of encountered irregularities does not allow for correct certification by the Body, the Body shall refer to these circumstances while estimating the extent of the problem and its financial impact.

The *Body for issuing declarations on winding-up of the EU assistance* on the request of EC shall carry out a further check acting in line with the recommendations of the EC, paying particular attention to describing and correcting irregularities in specified time.

The Body checks operations on the basis of a correct method of sampling, paying particular attention to:

- checking efficiency of the applied system of management and control in the institutions involved in the process of implementation of EQUAL;
- sample checking, on the basis of an analysis of risk, of the certified statement of expenditure at various levels concerned.

Selecting a sample of operation to check, the *Body for issuing declarations on winding-up of the EU assistance* takes into account:

- the need to check various types and sizes of operations,
- any risk factors that have been identified during the Treasury Control Offices checks,
- the concentration of operations in certain institutions, so as to make it possible to check each EQUAL MA, NSS and each Development Partnership at least once before the winding-up of assistance.

Through such external audit, the Body verifies among others:

- the practical application and effectiveness of the systems of management and control,
- in case of an adequate number of accounting records, the correspondence of those records with the accompanying documents held by the EQUAL MA, NSS, Development Partnerships and other entities carrying out the operations,
- the presence of an audit trail,
- in case of an adequate number of expenditure items, whether the nature and timing of their incurring comply with the provisions of the Community and correspond to the approved specifications of the given operation and the works actually executed,
- the national contribution of co-financing,
- whether the operation have been carried out in compliance with the provisions of the Community specified in *Art. 12 of the Regulation 1260/1999*.

The *Body for issuing declarations on winding-up of the EU assistance* shall establish whether any problems encountered are of a systematic character, entailing a risk for other operations being carried out by the same Development Partnership or administered by the NSS or the EQUAL MA. The Body shall also identify the causes of such situations, any further examination that may be required, and the necessary corrective or preventive measures.

The scope of an audit report exceeds the extent of certification and shall additionally contain a statement whether the *Body for issuing declarations on winding-up of the EU assistance* has been provided with rational guarantees that the control procedures have been properly designed and that they function correctly in practice. The report shall produce proofs provided by the Body that during all the period covered by the audit, internal audits and management controls functioned correctly, covered all the intended transactions, and gave rise (possibly) – to correction of faults. The report pays attention to all serious weak points revealed in the functioning of control mechanisms, with particular reference to those factors that might diminish effectiveness of the internal audit procedures. The factors shall be defined by the *Body for issuing declarations on winding-up of the EU assistance*.

8.1.11 Internal audit.

All of the institutions involved in implementing the EQUAL, i.e. the Paying Authority, the Community Support Framework Managing Authority, EQUAL MA, the NSS and Development Partnerships, have created or will create the internal audit units. The internal audit unit is not involved in any operational activity of the public finances sector unit. It plays the part of an advisory body for the manager of the institution, at the same time assuring it of the correct functioning of the system of financial management and control.

Establishing an internal audit is directly tied with the implementation of the law of July 27, 2001 on amending the law on public finance, the law on the organisation and work mode of the Council of Ministers and on the scope of the competence of ministers, the law on the sectors of government administration and the law on civil service, implemented on January 1, 2002 (*Journal of Laws 2001, No. 102, Text 1116*).

8.2 Development Partnerships

The EQUAL will be implemented by Development Partnerships. The partnership principle and the terms of setting up Partnerships have been presented in 5.1 „Partnership” and 7.1 „Setting up of Development Partnerships and transnational cooperation”.

The principles of their functioning and the scope of the tasks for each Development Partnership shall be clearly defined and presented in working plan of activities and in the respective Development Partnership Agreement, which will result from the first phase implemented under the Initiative EQUAL (action 1).

The composition and management arrangements within the Development Partnerships are important factors of success in implementation of EQUAL. The working relationship between partners will play important role during whole realisation of the programme on both, national and transnational levels.

To encourage institutions to establish Development Partnerships EQUAL MA will elaborate mechanisms for ensuring efficient number of effective Development Partnerships.

The strategy of implementation of these mechanisms created for building the capacity to fully use the available funds will be based on:

1) possible models of Development Partnership:

- Development Partnership, within the frames of which partnership sub-projects might be implemented to reach the common objectives defined by the Partnership on the basis of the themes (umbrella partnership). Sub-projects are activities assigned with special tasks concerned with solving the problems aimed at by the set-up Partnership, and their functioning shall be managed by the Managing Group of the set-up Partnership in compliance with the Development Partnership Agreement.
- Another model is a Partnership without sub-projects, which however implements a defined strategy and follows a defined model of action in accordance with the partnership principle.

This possibility of two organisational forms of Development Partnerships promote local partnerships and assure active participation of all organisations and institutions involved in the problems tackled by EQUAL, especially small ones and those representing groups exposed to discrimination or inequalities.

2) Management and administration arrangements of Development Partnership

Complexity and innovative character of EQUAL Community Initiative require involving in implementation of EQUAL institutions or organisations having capacity and experiences in management, administration, public finance, monitoring and control. Taking into account these conditions special attentions will be paid to assure participation, among others, the following: government budget institutions, regional and local governments, municipalities and depended organisations, public employment services, non-governmental organisations, small and medium enterprises, social partners, educational and training organisations.

At the stage of application for funds for implementation of the DP under the Initiative EQUAL, the DP promoter for DP must agree on and present a structure of management and administration of the public financial means and nominate the institution responsible for administration tasks (hereinafter DP Administrator). Nominated institution must have the status of a legal person and prove its competence in the management of public funds in accordance with the Law on Public Finance.

The role of the DP Administrator shall include:

- representing the Development Partnerships vis-à-vis EQUAL MA and NSS,
- signing the grant letters on behalf of Development Partnership,

- ensuring the correctness of financed operations, in particular by introduction of the management and control system on the level of Development Partnership (in the area of finance in compliance with guidelines of the Ministry of Finance and Monitoring Committee's recommendations to initiate correcting actions,
- submitting and confirmation of payment applications (statements of expenditures) to NSS,
- drawing up, at least on a quarterly basis, report of EQUAL implementation and its submission to NSS,
- collecting information on any irregularities and their submission to NSS; drawing up an annual report of irregularities in programme implementation,
- drawing up an annual forecast of expenses (payments) from ESF and their submission to NSS.

3) Financing of Development Partnerships

The Development Partnership is granted financial resources for implementation of the tasks presented in the application and detailed in the strategy provided in the Development Partnership Agreement. As the financial resources granted in the basis of the DP budget shall be understood the total sum of ESF financing, national co-financing from the state budget and it requires the share of private funds in compliance with the rules of State Aid. The resources from the ESF and from national co-financing shall be counted as a whole. In order to ensure appropriate monitoring of the expenditure of these resources, a Partnership must adopt particular rules that make it possible to collect homogenous data from all the subjects involved in the implementation of the DP, and transfer them to respective institutions.

8.3 Compliance with State aid legislation

General framework

Within the EQUAL Initiative, activities are carried out by Development Partnerships (DP) which are consortia, or legal entities consisting of several partners that might also include private undertakings, or by the individual partners of a DP. In the framework of the Structural Funds, the Development partnerships are final beneficiaries in the meaning of Regulation 1260/1999.

Article 87 of the EC Treaty prohibits any aid granted by a Member State or through State resources in any form whatsoever which distorts or threatens to distort competition by favouring certain undertakings or the production of certain goods. The EC Treaty, however, allows exceptions to the ban on State aid where the proposed aid schemes may have a beneficial impact in overall Union terms.

Therefore, pursuant to Articles 12, 17.1 and 19.2 of Council Regulation (EC) No 1260/1999, the Managing Authority will hold the overall responsibility for ensuring the compliance of all operations financed under this EQUAL CIP with the provisions of the Treaty as regards State aid.

By and large, grants awarded to undertakings under EQUAL do not constitute any State aid within the meaning of Art. 87.1 of the Treaty, because most of them involve only smaller amounts (and therefore will fall under the "de-minimis" rule¹⁹). Where they constitute State aid, as they are intended to facilitate access to work, or reducing risky employment situations

¹⁹ Commission Regulation (EC) No. 69/2001 of 12 January 2001 on the application of the Articles 87 and 88 EC Treaty on "de-minimis"-State aid

for disadvantaged people, they would mostly fall under the block exemption for aid to SMEs²⁰, Employment aid²¹ or training aid²².

Responsibilities

Compliance with Community policies will be checked on five levels:

- 1) All undertakings participating financially in EQUAL keep track of all respective public funding they have received, and of its respective justification. They are therefore aware of checking compliance with the "de-minimis" rule, if needed.
- 2) For each Development Partnership, the body in charge of administering the public funds, will identify if undertakings are intended to receive financial support under EQUAL, collect the relevant information from them, make a first check of compliance with State aid rules (block exemptions) and include a justification for the envisaged grant(s) in any financial proposal made to the Managing Authority.
- 3) The Managing Authority, as required under Article 34(1)(g) of Council Regulation No. 1260/1999, will ensure that grants to Development Partnerships are only issued if
 - a) all relevant information needed for a compliance check has been submitted by the Development Partnership as part of its proposals for funding, or for any modification of the grant under EQUAL;
 - b) the conditions under which the grant is awarded to an undertaking qualify for the block exemptions for employment aid, aid to SMEs, or training aid, or if they comply with the provisions of the "de-minimis"-rule, or if the grant has been formally approved under the Interim Mechanism laid down in Annex IV.3 of the Accession Treaty where applicable or by the Commission as laid down in Article 88 EC and Regulation 659/1999, and
 - c) in case the "de minimis "rule needs to be applied, the individual undertaking has been informed, before issuing the grant letter, that the support is of a "de minimis" nature and, if the firm has verified and confirmed that all other "de minimis " aid received by them will remain within the threshold and where the Managing Authority has checked that this will not raise the total amount of *de minimis* aid received during the relevant period of three years to above the threshold set out in the *de minimis* threshold or where a central register has been set up, it has been verified that the threshold has not been exceeded.
- 4) The Managing Authority will, as part of its monitoring system, collect all information as regards grants to enterprises for checking compliance with the "de-minimis" rule and the block exemptions. In case the latter cannot be applied, i.e. if individual grants represent aid in accordance with Art. 87(1) the EC, such funding will need to be notified as State aid and submitted to the European Commission for approval.
- 5) The Managing Authority will, in addition, establish a formal consultation mechanism with the State Aid Monitoring Department in the Office for Competition and

²⁰ Commission Regulation (EC) No.70/2001 of 12 January 2001 on the application of the Articles 87 and 88 EC Treaty on State subsidies to small and medium-sized enterprises and as amended by the Commission Regulation (EC) No 364/2004 of 25 February 2004

²¹ Commission Regulation (EC) 2204/2002 of 5 December 2002 on the application of Articles 87 and 88 of the EC Treaty to State aid for employment

²² Commission Regulation (EC) No. 68/2001 of 12 January 2001 on the application of the Articles 87 and 88 of the EC Treaty on training aid as amended by the Commission Regulation (EC) No 363/2004 of 25 February 2004

Consumer Protection which is the designated national authority for State aid control, and which has established the adequate mechanisms for control of the cumulation of State aid.

Funding under EQUAL granted to undertakings not covered by an exemption regulation or Commission approval is illegal and subject to the consequences set out in the procedural regulation for State aid, and its part-financing would be treated as an irregularity within the meaning of Articles 38 and 39 of Regulation (EC) No 1260/1999.

Consequently, the Commission will not accept requests for interim and final payments under Article 32 of the Regulation for measures being part-financed with new or altered aid, as defined in the procedural regulation for State aid, granted under aid schemes or in individual cases, until such aid has been notified to and formally approved by the Commission.

Relevant State Aid rules

The following rules are the most relevant rules for checking compliance with State aid legislation.

The table below summarises the main provisions only; details have been specified in the actual legal documents referred to above.

Block exemption	Company characteristics	Scope and EQUAL specific activities exempted	Maximum aid intensity for EQUAL in Poland exempted	Maximum amount of aid exempted	Further conditions for exemption
"De minimis" rule	All companies, but does not apply to the transport sector and the production, processing or marketing of certain agricultural and fisheries products	no restrictions	100%	€ 100,000 over a rolling 3-year period	No need for notification to the Commission. Poland has to set up a register of de minimis aid, or to inform companies of and check whether an additional aid does not raise the total amount above the ceiling.
Training aid	All companies	training activities which favour firms by reducing costs of training of their employees for acquiring new skills. Costs covered: trainers' personnel costs, travel costs or trainers and trainees, other current expense (material, supplies, etc.), depreciation of tools and equipment used exclusively for mentioned training, guidance and counselling and trainees' personnel costs	Specific training: 35% ²³ Further increases for: SME : 10% Disadvantaged workers:10% General training: 60% Further increases for: SME : 20% Disadvantaged workers:10%	€ 1,000,000	Commission needs to be informed within 20 working days
Aid for employment	All companies	Creation of jobs, recruitment of disadvantaged or disabled people, employing disabled people (additional costs only). Disadvantaged people include young persons below 25 or within 2 years from completing full-time education, migrant workers, members of ethnic minorities, long-term unemployed, unskilled and under-educated, elderly, women absent	Job creation: Regional aid ceiling Recruitment of disadvantaged people: 50% Recruitment of disabled people: 60% Aid for additional costs of employing disabled people: 100%	€ 15,000,000 over 3 years for a single enterprise	Commission needs to be informed within 20 working days. Other types of job related support are not exempted (aid for job sharing, aid for other types of disadvantaged workers, ...)

²³ 25% + 10% (Art. 87 (3) (a) regional increase)

		from working life or ex-prisoners. For conditions include net increase in no of jobs, maximum duration of aid			
The aid for small and medium-sized enterprises	SMEs with less than 250 employees	Tangible (land, buildings, plant/machinery) and intangible investment (expenditure entailed by technology transfer) and soft aid in SMEs. The costs of services provided by outside consultants and the costs of the first participation of an enterprise in a fair or exhibition are also eligible.	Services by outside consultants and participation in fairs: up to 50% Investment: Regional aid ceiling + 15%; Maximum aid intensity: 75%		Commission needs to be informed within 20 working days

State Aid Table

This EQUAL CIP provides public funding for 6 priorities. To the extent that undertaking participate in a Development Partnership, the Managing Authority will ensure that any grant to such an undertaking will comply with the rules State in the following table

Measure description	Block exemptions			Other cases	
1. Facilitating access and return to the labour market for those who have difficulty in being integrated or re-integrated into a labour market which must be open to all	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
2. Combating racism and xenophobia in relation to the labour market	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
3. Opening up the business creation process to all by providing the tools required for setting up in business and for the identification and exploitation of new possibilities for creating employment in urban and rural areas	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
4. Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
5. Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
6. Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
7. Reconciling family and professional life, as well as the re-integration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
8. Reducing gender gaps and supporting job desegregation	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
9. Supporting the social and vocational integration of asylum seekers.	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification

In conformity with its duties under Article 34(1)(g) of Council Regulation No 1260/1999, the Managing Authority will keep the above State aid table up-to-date and will inform the Commission of any modification of the table.

8.4 Reporting

In compliance with the provisions of Art. 37 of the Regulation 1260/99, the EQUAL MA shall submit to the European Commission annual and final reports on its implementation in six months from the end of each full calendar year. A final report shall be submitted to the Commission not later than six months after the deadline for qualification of expenses.

Before a report is submitted to the European Commission, it should be verified and approved by the EQUAL MC. The data included in the report might be used for information purposes in National Action Plans for Employment and Social Integration.

8.4.1 Monitoring and reporting – common minimum

As a minimum, the EQUAL MA shall every year collect the specified below quantitative and qualitative data related to EQUAL. The information shall be classified according to calls for application submission, by actions and according to themes, as well as globally for the whole programme. It will be transferred electronically to the European Common Database (ECDB), and also included in the annual report. Data on the number of applications submitted / approved will also be collected.

<u>Minimal quantitative data (input and output)</u>	<u>Accompanying minimum information of qualitative character</u>
Setting up of Development Partnerships and transnational cooperation:	
Data to be collected / registered in the end of Action 1: <ul style="list-style-type: none"> ▪ Total and average value of the means allocated for setting up Development Partnerships / Transnational Co-operation (DP/TC) ▪ The average time required for setting up DP/TC ▪ An average number of partners in DP/TC 	<ul style="list-style-type: none"> ▪ Development Partnerships and themes in geographical or sectoral terms
Implementation of DPs:	
<ul style="list-style-type: none"> ▪ The resources allocated for division according to the main activities (the list subject to agreement) and the division in case of activities under transnational co-operation (for example meetings with transnational partners) ▪ When required, the number of beneficiaries (persons / enterprises / others) under the main actions and the division according to sex and labour market status, refugee status applicants (people), size and sector (enterprises) ▪ The number of transnational meetings attended / the amount of time given to the participation in the events 	<ul style="list-style-type: none"> ▪ The type of national and transnational partners: state authorities (national, regional, local); (educational / training institutions; commerce / industry /handicraft chambers; employment service; entities providing public services / enterprises / non-governmental organisations ... – the list subject to agreement), countries ▪ Classification marking with a code of the main type of the implemented innovation <i>during the year</i> in line with the general typology in <u>Annex A</u> ▪ Classification/ marking with a code of the main activity under TC implemented <i>during the year</i> in line with the general typology in <u>Annex B</u>
Action 3 –Thematic networks, dissemination of good practices, and mainstreaming:	
<ul style="list-style-type: none"> ▪ The resources allocated for special preparation and participation ▪ The number of events participated in / the amount of time given to the participation in the events 	<ul style="list-style-type: none"> ▪ The type of the event (meeting/conference/other)
Participation of the appointed parties in the creation of networks, the dissemination and integrated achievement of equality at the European level:	

<ul style="list-style-type: none"> ▪ The resources allocated for preparation and participation ▪ The number of events participated in / the amount of time given to the participation in the events 	<ul style="list-style-type: none"> ▪ The type of the event (thematic review / discussion forum / other)
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8.5. Communication and promotion strategy

8.5.1. General arrangements

In compliance with Art. 46 of the Regulation 1260/99, the EQUAL MA shall be responsible for providing the EQUAL Initiative with communication and promotion strategy, and informing, in particular potential DP promoters, economic and social partners, institutions promoting equal opportunities of women and men, and respective non-governmental organisations, about the opportunities created by the ESF, as well as informing the public opinion about the role of the European Commission in the given support.

Information and promotion means shall be presented in the form of an annual plan of communication activities.

EQUAL MA will be supported in its tasks by NSS

In view of the specificity of the implementation of EQUAL, the communication and promotion strategy of the programme will be of a particular character.

The strategy of information and promotion of the action taken under EQUAL shall be implemented in three fields and addressed to the following disadvantaged groups:

- information and promotion activities addressed to potential and actual DP promoters – Development Partnerships;
- information addressed to the public opinion,
- information and promotion activities related to the dissemination of the DP outcomes.

Information and promotion activities addressed to potential and actual DP promoters

In line with the implementation timetable of EQUAL, it is assumed that the basic promotional activities addressed to potential DP promoters shall be implemented all over 2004 until Development Partnerships are selected. At the same time information activities shall be conducted that ensure transparency of the programme to various and potential partners. The information shall include a description of comprehensible administrative procedures and the selection criteria. The seminars and conferences foreseen will cover all regions of Poland and prospective potential partners.

The responsibility for information and promotion activities addressed to potential and actual DP promoters lies with the NSS, which shall work out the strategy of information and promotion, and implement it by technical assistance.

NSS will be responsible for ensuring equal access to the information concerning condition to participate in the selection procedure, selection criteria, results of the selection process to all applicants.

Information addressed to the public opinion

Informing the public opinion aims at raising the social awareness of the role of the European

Union in the creation of aid programmes and the results they will bring. The information shall point to the balanced participation of the European Union and related institutions and the actual contribution of the Community Initiative EQUAL.

Activities taken under the strategy of information addressed to the public opinion, which shall be worked out by the EQUAL MA, shall include among others:

- relations with the media at the national and regional level (press, radio and television),
- use of the logo and emblems of the European Union,
- use of the other communication channels, such as Web-sites, information bulletins, training.

Information related to the dissemination of programme outcomes.

One of the aim of EQUAL is to create and test a new methods and ways of achieving the policy objectives. The full success of the programme will be assured only in the case if good practices for these innovative approaches were disseminate across Member State and the whole Europe.

The architecture of EQUAL provide an excellent instrument for ensuring dissemination of information and exploitation of the results which are thematic networks.

The main recipients were be potential partners or DP promoters, public opinion as well as policy decision makers.

8.5.2 Plan of communication activities.

Taking those three groups into consideration is important from the point of view of future results of the programme, which – within the framework of mainstreaming process – should be integrated to the national and European policy. The communication strategy should consider this aspect of the programme and ensure mechanisms of its implementation.

The plan of communication activities should include the following elements:

- definition and creation of working information group(s) to identify the detailed needs of disadvantaged groups,
- organisation of information events (conferences, seminars, workshops),
- publishing information bulletins and maintaining the website,
- drawing up a guide for potential programme beneficiaries,
- drawing up promotion materials,
- maintaining the relation with media (press, radio, television)
- elaborating condition for visual identification of EQUAL.

The budget designated for activities connected with the implementation of information and promotion strategy amounts to about 1% of the total programme budget and it is classified supporting measures relevant for EQUAL. The final amount will be presented in the detailed annual plan of communication activities, which will be submitted for approval by the EQUAL MC.

The EQUAL MA shall be responsible for drawing up the plan of communication measures. As concerns the measures addressed to potential beneficiaries of the programme, the EQUAL MA will be supported by the NSS.

Additionally, each Development Partnership shall be obliged to present the promotion and communication plan at the DP level, taking into consideration the specific character of EQUAL, also the role of thematic networks and the need to disseminate programme results. The Development Partnerships will be supported in these activities by the NSS.

Further information on the communication and promotion strategy as well as conditions concerning use of logo and EU emblems will be described in details in the Programme Complement in compliance with *Art. 18 (3) b of the Regulation 1260/1999*. The communication and promotion strategy will be included in the Programme Complement and will be approved by EQUAL MC.

8.6 Co-operation with third countries

Moreover, the transnational co-operation could be extended to cover also similar projects financed under the PHARE, TACIS, CARDS and MEDA programmes in the countries of no member status. In some special and duly justified cases such co-operation might also include another partner from outside EQUAL on condition that a potential added value be clearly defined and such associated partner provide proof of its capacity to cover its own expenditure carried out within the framework of this co-operation. Partners from outside EQUAL will be called „associated transnational partners” and their participation will be submitted for approval by the Managing Authorities responsible for the respective partners.

9. FINANCIAL ISSUES

9.1. Financial plan

9.1.1. The financial plan of a programme.

The amount of 178,5 MEUR has been planned for the implementation of activities within the framework of EQUAL Initiative in Poland programmed for the period of 2004–2006 (commitments). 133,9 MEUR of this amount will come from ESF funding and 44,6 MEUR will come from national public funding. In all themes total budget is divided in the same proportion: 75% will be covered from ESF and 25% from national public funding. Theme A has the biggest financial allocation – nearly 34% of the total budget. Themes D and E will account for respectively 27% and 21% of EQUAL budget. Themes G and I will have smallest financial allocations: 9% and 2%. Technical assistance will cover up to 7% of resources planned for EQUAL.

The financial plan for EQUAL Programme in Poland is presented in Annex No 1

9.1.2. The resources for EQUAL CIP in the Polish system of public finance

The relevant Polish laws that apply for the EQUAL CIP can be summarised as follows:

1. The status of assistance resources in compliance with *the law of 26 November 1998 on public finance* (Dz. U. [Journal of Laws]No. 155,item. 1014, with subsequent amendments), referred further as *the Law on public finance*:

- according to Art. 3 paragraph 1 Item 2a of *the Law on public finance*, the Structural Funds resources are public funds.
- they are accounted for analogously with the subsidies from the State Budget.
- they are kept on individual bank accounts, which on the basis of a contract will be opened in the National Bank of Poland.

2. Financial supervision – in compliance with Art. 30b paragraph 2 of *the Law on public finance*, the Minister of Finance shall exercise financial supervision over the resources from the Structural Funds.

3. Presentation (accounting for) in the Budgetary Law.

In compliance with Art. 61 paragraph 4 Item 5 of *the Law on public finance*, in respect of the structural support, the implemented EQUAL CIP shall be presented in the budgetary law in form of appendices. The budgetary law shall include “*a specification of the programmes and projects implemented with the resources referred to in Art. 3 paragraph 1 Item 2a, as divided into various implementation periods and the resources of implementation funding; in respect of programmes, a specification accounts for the Structural Fund intervention categories.*”

4. Basic principles of the Structural Fund support expenditure:

- expenditure exclusively for a pre-determined purpose – Art. 30 Item 1 of *the Law*,
- compliance with the procedures in force – Art. 30 Item 2 of *the Law*,
- accounting principles – same as for subsidies from the State Budget – Art. 30a of *the Law*.

5. Sanctions applying in case of violation of the rules in force:

- repayment of the funds together with interests – Art. 30d paragraph 2 of *the Law*,
- ineligibility to apply for the support for the three successive years – Art. 30d paragraph 3 of *the Law*,
- a charge of violation of the public finance discipline, in compliance with Art. 138 paragraph 1 Item 4 or 18 of the Law, and possibly a punishment in accordance with the provisions of Section V of *the Law*.

EQUAL CIP shall have separate accounting and reporting.

9.1.3. Planning the resources for the EQUAL implementation, including the resources for co-financing and the scheme of transfer/flow of the Structural Fund resources under EQUAL

Basic elements of the system:

1. The European Commission issues a decision on approving the EQUAL CIP and awarding resources from the Structural Funds (Art. 31 Item 1 of *the Council Regulation No. 1260/99/EC*).

2. When the decision is made, an advance payment in the amount of 10% and 6% of the funds from the given assistance is paid out to the Paying Authority. As a rule, the advance payment cannot be split into more than 2 budgetary years – depending on the availability of budget funds (Art. 32 paragraph 2 of *the Council Regulation No. 1260/99/EC*).

The advance payment is transferred to the accounts of the Paying Authority (Ministry of Finance), opened for each fund of the Structural Funds respectively. The Ministry of Finance also has at its disposal a second group of accounts, used for keeping resources for implementing operational programmes and community initiatives.

3. On the grounds of an agreement concluded with the EQUAL MA, as provided in Art. 30b paragraph 3 of *the Law on Public Finance*, the Minister of Finance transfers the funds from the EQUAL account of the Ministry of Finance to the account of the EQUAL MA. This account will be opened on the basis of a bank account contract concluded between the MoELSP and National Bank of Poland. This account will be separate from the accounts used for the State Budget funds. The legal grounds for holding separate accounts, used for keeping funds from the Structural Funds are given in Art. 30d of *the Law on public finances*.

4. The funds from the advance payment, transferred to the account of the Managing Authority will be used in management for refunding as soon as possible the expenses incurred by the Development Partnerships.

5. EQUAL MA concludes grant letter (financing contracts) with Development Partnerships. The contract will specify, among others, the value of a contract, including the amount of the EU funds, split into various implementation periods (according to the DP implementation timetable), the amount of national co-financing and the workplan. In compliance with Art. 30d paragraph 1 of *the Law on public finance*, a contract concluded with Development Partnerships may also include the detailed requirements for using and accounting for the awarded EU resources. Paragraph 4 of that Article binds Development Partnerships to account for the funds in detail. The necessary national public contribution to EQUAL will be guaranteed in a special budgetary reserve as a part of national budget. In addition, there is an option that Development Partnerships could make available own resources for DP activities – private or public – if they foresee activities demanding private financial input or partners coming from public sector who want to involve their own funds. EQUAL MA will ensure that

The above draft summarises the flows for payment claims and for actual payments. The payments to DPs are agreed in the following way:

1. Whenever DPs have completed a specified activity, they fill in the special form – statement of expenditure and payment claim – and submit it to the NSS. DPs shall submit copies of the documents certifying the expenditure to the NSS.
2. NSS checks DP claims from the formal and technical point of view (eligibility of expenditure). NSS aggregates the verified DP claims in a special document – certification and aggregation of expenditure and reimbursement claim from NSS to EQUAL MA – and submits it to the EQUAL MA.
3. EQUAL MA, on the basis of the claim from NSS, provides to DPs financing from two separated national sources: pre-financing (75% of funds to be reimbursed from ESF – see IV) and co-financing (25% of funds from national reserve, according to the rules of budgetary reserve). For each of them special procedure is established by Ministry of Finance. Payments to DPs cover both ESF and national public contributions.

DP shall take into account the participation of an institution or institutions financed from the State Budget in the financing of a DP in order to facilitate payments at the level specified in the financial plan of the DP. EQUAL MA pays grant instalments to the organisations which are appointed to administer the public funds (EQUAL MA will provide guidelines on appointment of such organisation). NSS also makes use of the funds received from EQUAL MA when implementing technical assistance tasks.

4. EQUAL MA submits to the Ministry of Finance pre-financing claims based on the NSS claims. Ministry of Finance makes reimbursement from ESF EQUAL account to the indicated state budget accounts according to the pre-financing procedure.

The payments from the Commission to the EQUAL account in the Ministry of Finance are organised in the following way:

- I. EQUAL MA submits a special document – certification and aggregation of expenditure and reimbursement claim from Managing Authority to Paying Authority – to the Ministry of Finance. This document aggregates several NSS reimbursement claims and specifies the amount of expenditure actually reimbursed from ESF and the amount of national co-financing.
- II. Ministry of Finance, based on inter alia EQUAL MA reimbursement claim, makes a final claim to the European Commission
- III. European Commission, after approval of the claim, transfers the ESF funds to the Ministry of Finance
- IV. Ministry of Finance transfers the ESF funds to the ESF EQUAL account (National Bank of Poland account at MoELSP disposal)

9.3 Eligibility of activities

In compliance with Art. 21 paragraph 2 of the Regulation 1260/99, the measures taken under the EQUAL that support transnational cooperation serving to promote new ways of counteracting any forms of discriminations and inequality on the labour market are finance by the European Social Fund. The types of activities eligible for ESF funding are given in the ESF Regulation (No. 1784/1999) and the Eligibility Regulation (No. 448/2004).

In order to achieve the maximum effectiveness of activities within EQUAL in Poland will also be possible to fund actions normally eligible under the ERDF Regulation (No. 1783/1999) and the EAGGF Regulation (No. 1257/1999). Thus activities eligible under the other Structural Funds are also eligible for EQUAL to a limited extent, if necessary for the effective implementation of the programme and as examples can include:

- purchase of the equipments indispensable to support the running of the DPs,
- purchase of the equipments indispensable to provide services by the entities of the DPs to the beneficiaries of the projects,
- purchase of the telecommunication equipments, infra-structural technologies and others which facilitate access to the services (tele-work, distance learning,...), if indispensable for the purpose of the DP,
- construction/ adaptation/ purchase of infra-structures and equipments in favour of the disadvantaged groups to ensure process of their professional and social integration, transport infrastructure, adaptation of the workplace and others adaptation for promotion of the equal opportunity of women and men, if indispensable for the purpose of the DP,

It should be noted that such expenditure should take place only in duly justified and exceptional cases and should not take away ESF focus from human resources policies.

Programme Complement for CIP will specify in detail rules for eligible expenditure.

10. MONITORING

10.1 Data collection

10.1.1 Consolidation of the data at the European level

Poland will share specific monitoring data by participating in the common electronic system of data collection set up by the Commission for the specific management of the EQUAL Initiative called: "EQUAL Common Database" (ECDB). The objective of this database is to facilitate the transnational co-operation of the DPs, to stimulate thematic co-operation between key actors at European level and to indicate results and achievements.

Based on an agreement between the Commission and the Member States, specific fields were identified. Set out in Annex 2, they constitute the exhaustive²⁴ list of the common quantitative data to be transmitted at the European level. In addition to monitoring data shared at European level, the DPs are required to transmit further monitoring data needed for programme management at the national level, as described in this section. The set of data shared at EQUAL level is summarised in the Annex 2.

The Managing Authority will make the necessary provisions in order that the open fields (text fields) are translated at least into English (in addition to the Polish language).

The Managing Authority will collect the physical data from the Development Partnerships on the basis of Polish methods of data collection. It will transfer the data concerning the Development Partnerships as well as those collected at the level of the programme to the ECDB on the basis of the technical protocols defined by the Commission. These data will be updated continuously by the Managing Authority and will be transferred to the Commission at least once per week.

The Managing Authority will transmit the data relating to the CIP annual report at least once a year and at the latest on 30 June following the reference year.

The Commission, by means of suitable IT system, will make available on the Internet the information²⁵ transmitted by the Member States.

The Managing Authority shall gather physical data from the appointed parties on the basis of the System of Monitoring and Financial Control of the Structural Funds and the Cohesion „SIMIK” and PEFS. Responsibility for the input of data in the SIMIK shall lie with the NSS that receives periodic information from Development Partnerships. The data communicated in reports should correspond with the information presented by Partnerships in their application for the ESF support, which enables verification of the assumed aims. Next, the data concerning the appointed parties and the data gathered at the programme level shall be put by the EQUAL MA into ECDB, by way of the technical protocols specified by the Commission. The data related to the phase of implementation shall be continually updated by the NSS, and submitted to the Commission. On the basis of the monitoring data annual reports shall be prepared for the Monitoring Committee and the European Commission, and submitted at least once a year on 30 June at the latest, the year following the base year.

Some of the data, especially qualitative data gathered from Development Partnership, go

²⁴ Except financial information included in the "Vademecum for the Plans and Programming documents of the Structural Funds" which will be collected by the SFC database.

²⁵ On the basis of decisions taken in a concerted way, access to certain fields could be restricted.

beyond the form sheet of the monitoring report registered in the SIMIK system. Such data shall be gathered and kept in the NSS.

With the help of adequate computer systems, the Commission shall render the summary²⁶ of information submitted by the Member States accessible in the Internet. It will allow for individual learning about activities of each appointed party and about consolidated situation of the implementation at the level of all the programmes.

In case of closed fields (typology), the (computer) application of the Commission shall allow for learning, in all official languages, about the fields useful in transnational cooperation. The EQUAL MA shall take adequate decisions in order to translate open fields (textual fields) into English at least (apart from the Polish language).

10.1.2. Annual report on implementation

Some homogeneity is desired in annual reports of different Member States in view of good monitoring of the whole process of the Initiative implementation, and in order to co-ordinate the efforts being made to create a network at national and the European level.

Minimum common quantitative data on the implementation, which have been submitted together with an annual report, are sent to ECDB (Annex 2). Other essential indicators concerning the situation, results or the impact, assumed in this programming document, shall also be included in an annual report.

So far as the implementation of EQUAL is gradually carried out, it is impossible to specify ahead a common format. Every year, at proper time, the Commission in cooperation with representatives of EQUAL MA shall define a common structure of annual reports. This common structure does not prevent the EQUAL MA or the EQUAL MC from supplementing it with all essential in their opinion elements.

²⁶ According to decisions taken in an agreed way, access to some fields might be limited.

11. EVALUATION

The basis for the evaluation of the Community Initiative EQUAL shall be the Regulation No. 1260/1999 and the general guidelines of the Commission on the monitoring and evaluation of the Community Initiative EQUAL for the programming period of 2000-2006. As for the evaluation of the programme, the primary reference document is *The guidelines for the monitoring and evaluation mechanisms of the Community Initiative EQUAL for 2000-2006*.

The programme shall specify importance of an independent evaluation, which:

- starts at the same time as the Development Partnership
- covers the whole lifetime of the Programme and the Development Partnership,
- takes into account self-evaluation of the Development Partnership and is carried out in compliance with the EQUAL principles.

The EQUAL Programme places a strong emphasis on achieving qualitative objectives and developing new mechanisms and procedures, so that evaluations in connection with monitoring and dissemination of good practices by way of thematic networks are particularly important. The Structural Fund Programmes are evaluated before the beginning of the activities (ex ante evaluation), during the activities (on-going or/and mid term evaluation), and after their conclusion (ex post evaluation). The results of an evaluation shall serve to target activities in line with the needs.

The EQUAL mid-term evaluation is concerned with the implementation of the programme as a whole. As Poland has got accession only to the second round of the Initiative EQUAL starting from 2004, a mid-term evaluation shall not be made, however the on-going evaluation of the programme will be introduced.

Innovative, experimental and transnational character of the Initiative EQUAL gives rise to the need for a high quality evaluation concerning the national factors and their impact at the European level. Apart from a national evaluation there is also going to be made an evaluation at the European level. Within the frames of a partnership cooperation between the Member States and the Commission, attention shall be paid to attain as large as it is possible a harmonisation of the requirement scopes for particular evaluations, meetings of the national evaluators, and searching experience useful for further implementation of the programme.

11.1 Ex ante evaluation

In case of Poland, an ex ante evaluator is an independent external expert, who has no whatsoever connections with the management or implementation of the programme. The evaluator has been selected on the ground of his experience in social policy and employment, and in order to ensure cohesion with other operational programmes co-financed by ESF. Considering the fact that Poland participates in the Structural Fund Programmes for the first time and does not have any possibility to use experience from earlier Initiatives, a correct ex-ante evaluation is of a particular importance. The role and methods of the evaluator's work are mainly of a consulting and counselling character and are an important contribution to the programming process. The evaluator has been constantly co-operating with the institution responsible for preparation of the EQUAL CIP, took part in the working meetings to prepare the programming documents.

The ex ante evaluation of this Programme, made in compliance with Art. 41 of the Regulation 1260/99 introducing the general provisions on the Structural Funds constitutes Annexe 4 of this programming document.

11.2 On-going evaluation

Articles 40-43 of Regulation (EC) 1260/1999 set out the requirements for evaluating the Polish Community Initiative Programme.

The evaluation of the Polish EQUAL CIP needs to reflect the experimental approach of this Community Initiative and therefore covers not only the classical evaluation dimensions such as relevance, efficiency, effectiveness, utility and sustainability, but also focuses on the processes, support structures and policy delivery systems.

In order to effectively extract the good practice generated and tested under EQUAL and mainstream it, it is essential to maintain an evaluation function in all actions of EQUAL, and an observatory function to integrate experience and evidence generated elsewhere.

Poland will therefore:

- request that all DPs develop a methodology and apply appropriate mechanisms for on-going assessment of their activities and achievements, including a description of verifiable indicators which demonstrate how the objectives, outputs and results will be measured and assessed, as well as the corresponding methodology and mechanisms for monitoring and assessment of joint activities in the transnational co-operation;
- carry out an independent on-going evaluation at CIP level, beyond the formal requirements of the Regulation, with a focus on identifying factors contributing to the success (or failure) of innovation, the mainstreaming of results, and sustainability.

EQUAL is about learning. With EQUAL, Poland will be entering new ground in terms of governance, policy issues and policy development. An ongoing evaluation will facilitate learning processes amongst all national stakeholders involved, and contribute to capacity building within the public sector. In an innovative, transnational programme like EQUAL it is important to make use of the 2004-2006 period to build and develop capacity to carry out evaluation of the programmes and to draw lessons for the 2007-2013 programming period.

The Managing Authority will therefore design and carry out an on-going evaluation for the whole period, focussing on the lessons learnt for capacity building, networking, gender mainstreaming, inclusion of minorities, and transnational cooperation. Details will be described in the Programming Complement and Evaluation Strategy for EQUAL.

In defining the terms of reference for the on-going evaluation, the Management Authority will apply the Guidelines for monitoring and evaluating EQUAL²⁷, synchronise delivery dates, follow a common methodological approach, and focus on common issues in order to exploit synergies between national and EU evaluations.

The evaluation should look both at the policy side, notably the impact of the programme on the labour market context, its policies and practices and the effectiveness of the implementation mechanism in the country. The on-going evaluation will consist of quantitative analysis of the data derived from the monitoring system, individual interviews with stakeholders of the programme (key players and policy makers), questionnaires and surveys of project promoters and ultimate beneficiaries. The results from the Development

²⁷ "Guidelines for systems of monitoring and evaluation for the Human Resources Initiative EQUAL in the period 2000 – 2006". DG Employment and Social affairs, July 2000; Updated version of key issues for the mid-term evaluation of EQUAL CIP in the Member States, DG Employment and Social Affairs 03/09/2001,

Partnerships self-evaluation will be an important source of information for evaluation. Detailed information about methodology, organisation and funding of the evaluation process will be described in the Evaluation Strategy. The Strategy will be built in the co-operation with National Evaluation Unit in the Ministry of Economy, Labour and Social Policy, the central element of enhancing Poland's evaluation capacities, and approved by the Monitoring Committee.

The Polish evaluation system for EQUAL will ensure that the results from the EQUAL programme will be developed to ensure a continuous feed-back to programme implementation and as a vehicle to contribute to the validation experiences and results from the EQUAL DPs, and to their transfer to the relevant stakeholders and decision-makers.

The first step of the on-going evaluation at CIP level will update the baseline audit presented in this Programming Document. The evaluation will focus on management systems, programme implementation dynamics, monitoring systems, selection procedures and implementation of *Action 1*. The on-going evaluation will also closely examine the way how partnerships are founded and operated. A report on these should be foreseen by the end of 2005. The fact that Member States participating in the first round have already carried out an evaluation of the first round could provide some useful lessons for Poland to follow. A particular focus on the initial phase of the on-going evaluation will be providing lessons for the future programming period.

The on-going evaluation will be trusted to independent external experts. These will be selected in compliance with national and EU rules for public procurement. The Managing Authority will issue the call for tender for the on-going evaluation at national level immediately after the adoption of the CIP by the Commission and the adoption of the Programming Complement.

The Managing Authority will also be responsible for collecting of data from DPs for actions 1, 2 and 3, and will make these data available to the evaluators.

The Managing Authority will establish an Evaluation Steering Group to monitor the evaluation process and results at national level. This Steering Group will be composed of representatives of the Managing Authority and the key stakeholders/ members of the Monitoring Committee, and will also include leading national labour market and social inclusion experts. The European Commission will also participate in this Steering Group in the spirit of partnership.

The mandate and composition of this Steering Group will be described in the Programming Complement, as well as the thematic focus, milestones, reporting dates, and the interfaces and linkages between evaluation activities at the level of DPs, and of the EU.

11.3 Ex post evaluation

The ex-post evaluation will be carried out by the European Commission, in collaboration with the Member States and the EQUAL MA. The ex-post evaluation shall be based on the results of the previous, on-going, evaluations. It shall be made in three years from the conclusion of the programming period.

An ex-post evaluation shall be concerned with a success of the implementation, the utilisation of the resources, effectiveness, and the impact of the implemented activities. It shall draw conclusions regarding policy on economic and social cohesion. It shall cover the factors contributing to the success or failure of the implementation and the achievement and results,

including their sustainability Ultimately the evaluation should give an answer to how and to what extent EQUAL has succeeded in achieving its overall objectives of creating and transferring new ways of delivering employment policies.

Annex 1. FINANCIAL TABLE FOR THE COMMUNITY INITIATIVE EQUAL IN POLAND FOR THE YEARS 2004-2006
 FINANCIAL TABLE FOR THE COMMUNITY INITIATIVE EQUAL IN POLAND FOR THE YEARS 2004-2006

Priority/ Year	Total Expenditures	Public							Private	Income
		Total Public Expenditures	ESF	National Public Contribution						
				Total	Central	Regional	Local	Other		
Priority 1 Theme A	60,361,490	60,361,490	45,271,116	15,090,374	15,090,374	0	0	0	0	0
2004	14,330,087	14,330,087	10,747,565	3,582,522	3,582,522	0	0	0	0	0
2005	20,199,451	20,199,451	15,149,588	5,049,863	5,049,863	0	0	0	0	0
2006	25,831,952	25,831,952	19,373,963	6,457,989	6,457,989	0	0	0	0	0
Priority 2 Theme D	48,932,090	48,932,090	36,699,068	12,233,022	12,233,022	0	0	0	0	0
2004	11,616,697	11,616,697	8,712,523	2,904,174	2,904,174	0	0	0	0	0
2005	16,374,701	16,374,701	12,281,026	4,093,675	4,093,675	0	0	0	0	0
2006	20,940,692	20,940,692	15,705,519	5,235,173	5,235,173	0	0	0	0	0
Priority 3 Theme F	37,681,281	37,681,281	28,260,961	9,420,320	9,420,320	0	0	0	0	0
2004	8,945,704	8,945,704	6,709,278	2,236,426	2,236,426	0	0	0	0	0
2005	12,609,716	12,609,716	9,457,287	3,152,429	3,152,429	0	0	0	0	0
2006	16,125,861	16,125,861	12,094,396	4,031,465	4,031,465	0	0	0	0	0
Priority 4 Theme G	16,072,584	16,072,584	12,054,438	4,018,146	4,018,146	0	0	0	0	0
2004	3,815,703	3,815,703	2,861,777	953,926	953,926	0	0	0	0	0
2005	5,378,552	5,378,552	4,033,914	1,344,638	1,344,638	0	0	0	0	0
2006	6,878,329	6,878,329	5,158,747	1,719,582	1,719,582	0	0	0	0	0
Priority 5 Theme I	3,035,932	3,035,932	2,276,949	758,983	758,983	0	0	0	0	0
2004	720,744	720,744	540,558	180,186	180,186	0	0	0	0	0
2005	1,015,948	1,015,948	761,961	253,987	253,987	0	0	0	0	0
2006	1,299,240	1,299,240	974,430	324,810	324,810	0	0	0	0	0
Priority 6 Technical assistance	12,500,898	12,500,898	9,375,674	3,125,224	3,125,224	0	0	0	0	0
2004	2,967,768	2,967,768	2,225,826	741,942	741,942	0	0	0	0	0
2005	4,183,317	4,183,317	3,137,488	1,045,829	1,045,829	0	0	0	0	0
2006	5,349,813	5,349,813	4,012,360	1,337,453	1,337,453	0	0	0	0	0
Total	178,584,275	178,584,275	133,938,206	44,646,069	44,646,069	0	0	0	0	0
2004	42,396,703	42,396,703	31,797,527	10,599,176	10,599,176	0	0	0	0	0
2005	59,761,685	59,761,685	44,821,264	14,940,421	14,940,421	0	0	0	0	0
2006	76,425,887	76,425,887	57,319,415	19,106,472	19,106,472	0	0	0	0	0

* The amount of private resources, if these are necessary according to the public aid rules, will be defined individually for every project.

Annex 2. Data shared through the EQUAL common database (ECDB)

A. General information (ongoing information)

FIELDS		Type of data / Items...
A1.	Id Codes	European = Country + national ID <i>Each DP receives a unique code at European level. It is made up of a maximum of 4 letters identifying the Member State and x characters as decided by the Member State.</i>
A2.	Status of the application	<i>Indicate the status of the application in MS</i> Multiple choice <input type="checkbox"/> in selection process <input type="checkbox"/> selected <input type="checkbox"/> transnational cooperation completed <input type="checkbox"/> DP ended

B. Set up of the Development partnership (action 1 - ongoing information)

B1.	Dates	<input type="checkbox"/> Application date : date field <input type="checkbox"/> Selection date : date field
B2.	Title of the DP National language	Text field – max 80 characters <i>Simple & short</i>
B3.	Title of the DP International characters	Text field – max 80 characters <i>Latin alphabet without accented letters...</i>
B4.	Applicant partners	<i>For each Item, click in the list of the members</i> Concerns DP initiators <input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2 <input type="checkbox"/> Partner ...n
B5.	DP managing organisation	One choice in the table of the partners <i>Concerns the partner who has administrative and financial responsibility within the DP. If the DP has its own legal constitution, that structure will be identified in the list of partners. Click in the list of the members</i>
B6.	Other responsibilities	<i>For each item, click in the list of the members</i> <input type="checkbox"/> Design of the DP strategy and planning <input type="checkbox"/> Co-ordination of experimental activities <input type="checkbox"/> Monitoring, data collection <input type="checkbox"/> Evaluation <input type="checkbox"/> Coordination of Transnational partnership
B7.	EQUAL Theme – Measure	Max 1 choice <input type="checkbox"/> Employability - Access to the labour market <input type="checkbox"/> Employability - Combating racism <input type="checkbox"/> Entrepreneurship - Business creation <input type="checkbox"/> Entrepreneurship - Social economy <input type="checkbox"/> Adaptability - Life long learning

		<input type="checkbox"/> Adaptability - Information technology <input type="checkbox"/> Equal opportunities – Reconciling family and professional life <input type="checkbox"/> Equal opportunities - Reducing gender gaps <input type="checkbox"/> Asylum seekers
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B9.	Geographical/sectoral	Max 1choice <i>Size of the geographical area linked with a Nuts table</i>
	If geographical	<input type="checkbox"/> Rural area <input type="checkbox"/> Urban area <input type="checkbox"/> Other geographical
	If sectoral	Max 1choice <ul style="list-style-type: none"> • Economic sector : <ul style="list-style-type: none"> <input type="checkbox"/> Agriculture <input type="checkbox"/> Industrial <input type="checkbox"/> Services • <input type="checkbox"/> Specific discrimination and inequality problems

B10.	DP status	Max 1 choice
	Legal form	<input type="checkbox"/> Association without legal form <input type="checkbox"/> Non-profit making organisation <input type="checkbox"/> Consortium <input type="checkbox"/>

B10b	Pre-existing partnership	Max 1choice
		<input type="checkbox"/> No <input type="checkbox"/> Yes ≤ 2 years <input type="checkbox"/> Yes > 2 years
		Text field : explanation of the pre-existing partnership

B11.	DP linguistic skills	4 Scroll down menus
		1° Choice : es/cs/da/de/et/el/en/fr/it/lv/lt/hu/mt/nl/pl/pt/sk/sl/fi/sv 2° Choice : es/cs/da/de/et/el/en/fr/it/lv/lt/hu/mt/nl/pl/pt/sk/sl/fi/sv 3° Choice : es/cs/da/de/et/el/en/fr/it/lv/lt/hu/mt/nl/pl/pt/sk/sl/fi/sv 4° Choice : es/cs/da/de/et/el/en/fr/it/lv/lt/hu/mt/nl/pl/pt/sk/sl/fi/sv

B12.	DP background in CI	Max 1choice
		<input type="checkbox"/> One partner involved in ADAPT/EMPLOYMENT/EQUAL 1 st Round <input type="checkbox"/> Two and more partners involved in A/E/E <input type="checkbox"/> Nobody involved in A/E/E

B13.	Rationale for the DP	Rationale for the partnership, assessment of the relevance of the problem addressed, of the solution to be tested. Text field..
		Text field: Translation in English and optionally in other(s) language(s) (provided by DP or Member state).

B14.	Objectives of the DP	Response to the rationale; objectives of the partnership Text field :
		Text field: Translation in English and optionally in other(s) language(s) (provided by DP or Member state).

B15.	Nature of the experimental activities	Multiple choice.																																																		
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="text-align: center;">+</th> <th style="text-align: center;">++</th> <th style="text-align: center;">++</th> <th style="text-align: center;">++</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Assistance to persons</td> <td></td> <td></td> <td style="text-align: center;">+</td> <td style="text-align: center;">++</td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> Guidance and counselling</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> Training</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> Training on work place</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> Work placement</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> Job rotation and job sharing</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> employment aids (+ for self-employment)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding-left: 20px;"><input type="checkbox"/> Integrated measures (pathway to integration)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Assistance to structure and systems and accompanying measures</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		+	++	++	++	<input type="checkbox"/> Assistance to persons			+	++	<input type="checkbox"/> Guidance and counselling					<input type="checkbox"/> Training					<input type="checkbox"/> Training on work place					<input type="checkbox"/> Work placement					<input type="checkbox"/> Job rotation and job sharing					<input type="checkbox"/> employment aids (+ for self-employment)					<input type="checkbox"/> Integrated measures (pathway to integration)					<input type="checkbox"/> Assistance to structure and systems and accompanying measures				
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<input type="checkbox"/> Integrated measures (pathway to integration)																																																				
<input type="checkbox"/> Assistance to structure and systems and accompanying measures																																																				

	<input type="checkbox"/> Employment creation and support <input type="checkbox"/> Training of teachers, trainers and staff <input type="checkbox"/> Improvement of employment services – Recruitment structures <input type="checkbox"/> Conception for training programmes - certification <input type="checkbox"/> Anticipation of technical changes <input type="checkbox"/> Work organisation, improvement of access to work place <input type="checkbox"/> Guidance and social services <input type="checkbox"/> Awareness raising, information, publicity <input type="checkbox"/> Studies and analysis of discrimination features				
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B16.	Innovation	Multiple choice				
			+	++	++	++
		<input type="checkbox"/> Process-oriented <input type="checkbox"/> Goal-oriented <input type="checkbox"/> Context oriented			+	++
		Text field				

B17.	Discriminated groups and fields of discrimination	Multiple choice in each section	<i>In percentage</i>			
		<input type="checkbox"/> Assistance to persons <input type="checkbox"/> Unemployed <input type="checkbox"/> Employed <input type="checkbox"/> Others (without status, social beneficiaries...)	M	F		
					100	
		<input type="checkbox"/> Migrants, ethnic minorities, ... <input type="checkbox"/> Asylum seekers <input type="checkbox"/> Population not migrant and not asylum seeker			100	
		<input type="checkbox"/> Physical Impairment <input type="checkbox"/> Mental Impairment <input type="checkbox"/> Mental Illness <input type="checkbox"/> Population not suffering from a disability			100	
		<input type="checkbox"/> Substance abusers <input type="checkbox"/> Homeless <input type="checkbox"/> (Ex-)prisoners <input type="checkbox"/> Specific discrimination <input type="checkbox"/> Without specific discrimination			100	
		<input type="checkbox"/> < 25 year <input type="checkbox"/> 25 – 50 year <input type="checkbox"/> > 50 year			100	
		<input type="checkbox"/> Assistance to structure and systems and accompanying measures	+	+	+	+
		<input type="checkbox"/> Age <input type="checkbox"/> Asylum <input type="checkbox"/> Disabilities <input type="checkbox"/> Gender discrimination <input type="checkbox"/> Low qualification <input type="checkbox"/> Racial discrimination <input type="checkbox"/> Religion <input type="checkbox"/> Sexual orientation <input type="checkbox"/> Support to entrepreneurship <input type="checkbox"/> Unemployment				

B18.	Empowerment				
	1° National partners	Text field: Text field: optionally, translation in English			
		Multiple choice			

	2° Participants - Stakeholders	<input type="checkbox"/> Promoting individual empowerment <input type="checkbox"/> Developing collective responsibility and capacity for action <input type="checkbox"/> Participation in the DP design <input type="checkbox"/> Participation in running and evaluating activities <input type="checkbox"/> Changing attitudes and behaviour of key actors
		Text field:
		Text field: optionally, translation in English

B19.	ESF budget	Max. one choice
		Total budget for the duration of the DP (ESF + national) <input type="checkbox"/> < 250 000 € <input type="checkbox"/> 250 000 – 500 000 € <input type="checkbox"/> 500 000 – 1 000 000 € <input type="checkbox"/> 1 000 000 – 1 500 000 € <input type="checkbox"/> 1 500 000 – 2 000 000 € <input type="checkbox"/> 2 000 000 – 5 000 000 € <input type="checkbox"/> > 5 000 000 €
		% of total budget for transnational activities

B21.	Transnational co-operation intended or searched	Multiple choice				
		<input type="checkbox"/> Exchange of information and experiences <input type="checkbox"/> Parallel development of innovative approaches <input type="checkbox"/> Import, export or adoption of new approaches <input type="checkbox"/> Joint development <input type="checkbox"/> Exchange of trainees/trainers/staff				
		Text field				
		Text field: Translation in English and optionally in other(s) language(s) (provided by DP or Member state).				

B22.	Transnational co-operation – Preferences	Multiple choice
		<input type="checkbox"/> BEfr <input type="checkbox"/> BEnl <input type="checkbox"/> CZ <input type="checkbox"/> DK <input type="checkbox"/> DE <input type="checkbox"/> EE <input type="checkbox"/> EL <input type="checkbox"/> ES <input type="checkbox"/> FR <input type="checkbox"/> IE <input type="checkbox"/> IT <input type="checkbox"/> CY <input type="checkbox"/> LV <input type="checkbox"/> LT <input type="checkbox"/> LU <input type="checkbox"/> HU <input type="checkbox"/> MT <input type="checkbox"/> NL <input type="checkbox"/> AT <input type="checkbox"/> PL <input type="checkbox"/> PT <input type="checkbox"/> SI <input type="checkbox"/> SK <input type="checkbox"/> FI <input type="checkbox"/> SE <input type="checkbox"/> UKgb <input type="checkbox"/> UKni <input type="checkbox"/> no preferences

B23.	Last update	<input type="checkbox"/> Date field
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C. Members of the DP (ongoing information)

C1.	Name	Text field
C2.	Acronym	(not compulsory) Text field
C3.	Address	Text field <i>link with postcode (nuts) and country</i>
C4.	Tel	Text field
C5.	Fax	Text field
C6.	Email	Text field
C7.	Web site	Text field

C8.	Type of organisation	Max one choice
		<input type="checkbox"/> Public authority (national, regional, local) <input type="checkbox"/> Enterprise <input type="checkbox"/> Employers' organisation <input type="checkbox"/> Trade Union <input type="checkbox"/> Financial institution <input type="checkbox"/> Chamber of commerce/industry/crafts <input type="checkbox"/> Organisation providing support and guidance for disadvantaged groups <input type="checkbox"/> Employment services <input type="checkbox"/> Social economy enterprise <input type="checkbox"/> Social services

		<input type="checkbox"/> Education / training organisation <input type="checkbox"/> University / Research organisation <input type="checkbox"/> Consortium created for managing the DP <input type="checkbox"/> Other
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C8b	Type of organisation	Description who the national partners are, what they do, their clients, the aim of the partner organisations, methodologies used etc... (not compulsory)
		Text field
		Text field: Translation in English and optionally in other(s) language(s) (provided by DP or Member state).

C9.	Legal status	Max one choice
		<input type="checkbox"/> Public organisation <input type="checkbox"/> Non-profit private organisation (including NGO...) <input type="checkbox"/> Semi-public organisation <input type="checkbox"/> Union, Confederation... <input type="checkbox"/> Co-operative <input type="checkbox"/> Private <input type="checkbox"/> Without legal status

C10.	Contact person	Responsibility	Name	Email	Tel

C11.	Size of the organisation	Max one choice	<i>Permanent staff</i>
		<input type="checkbox"/> staff < 10 <input type="checkbox"/> staff 10 – 50 <input type="checkbox"/> staff 50 – 250 <input type="checkbox"/> > 250	

C12.	Date of joining DP	Date field
C13.	Date of leaving DP	Date field

C14.	Last update on the DP's member	Date field
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D. Implementation of the work programme (transnational cooperation completed) (action2 - ongoing information)

D1.	Dates	<input type="checkbox"/> Date of transnational cooperation completed
D2.	Title of the DP	
D3.	Title of the DP (international)	
D4.	Partners involved	<i>For each Item, click in the list of the members</i>
		DP members <input type="checkbox"/> Partner 1 <input type="checkbox"/> Partner 2 <input type="checkbox"/> Partner ...n
D5.	DP managing organisation	
D6.	Other responsibilities	See B
D7.	EQUAL Theme – Measure	See B
D8.	Sub-themes	See B
D9.	Geographical/sectoral	See B
D10.	DP status	See B
D11.	DP linguistic skills	See B
D12.	DP's background in CI	See B
D13.	Rationale for the DP	See B

D14.	Objectives of the DP	See B
D15.	Nature of the experimental activities to be implemented	See B
D16.	Innovation	See B
D17.	Discriminated groups and fields of discrimination	See B
D18.	Empowerment	See B
D19.	Budget	See B

D25.	DP Agreement	Text field : Summary of the DP agreement and, optionally, DP agreement in annexe.
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D25 A	Transnational partners	Multiple choice
		<i>Click in the list of the Development partnerships (cf. Id Code)</i>
		<input type="checkbox"/> Transnational partner 1 <input type="checkbox"/> Transnational partner 2 <input type="checkbox"/> Transnational partner ...n

G. Other information for monitoring at DP level (annually consolidated information)

G1.	Discriminated groups and fields of discrimination	Total number of beneficiaries during the year in "person * year" equivalent (1 day=7 hours, 1 week = 5 days, 1 month = 4 weeks, 1 year = 12 month)				
		Multiple choice in each section				
			<i>In percentage</i>			
		<input type="checkbox"/> Assistance to persons	M	F		
		<input type="checkbox"/> Unemployed <input type="checkbox"/> Employed <input type="checkbox"/> Others (without status, social beneficiaries...)			100	
		<input type="checkbox"/> Migrants, ethnic minorities, ... <input type="checkbox"/> Asylum seekers <input type="checkbox"/> Population not migrant and not asylum seeker			100	
		<input type="checkbox"/> Physical Impairment <input type="checkbox"/> Mental Impairment <input type="checkbox"/> Mental Illness <input type="checkbox"/> Population not suffering from a disability			100	
		<input type="checkbox"/> Substance abusers <input type="checkbox"/> Homeless <input type="checkbox"/> (Ex-)prisoners <input type="checkbox"/> Other discriminated (religion, sexual orientation) <input type="checkbox"/> Without such specific discriminations			100	
<input type="checkbox"/> < 25 year <input type="checkbox"/> 25 – 50 year <input type="checkbox"/> > 50 year			100			
	<input type="checkbox"/> Assistance to structure and systems and accompanying measures	+	+	+	+	
			+	+	+	
				+	+	
					+	

		<input type="checkbox"/> Age <input type="checkbox"/> Asylum <input type="checkbox"/> Disabilities <input type="checkbox"/> Gender discrimination <input type="checkbox"/> Low qualification <input type="checkbox"/> Racial discrimination <input type="checkbox"/> Religion <input type="checkbox"/> Sexual orientation <input type="checkbox"/> Support to entrepreneurship <input type="checkbox"/> Unemployment					
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G2.	Expenditures	Evaluation by the DP of the total amount (ESF and national) spent during the year (rounded 1 000 €):
		Alphanumeric field

G3.	Breakdown of expenditures by experimental activities			<i>Percentage</i>	
		I. National activities			
		<input type="checkbox"/> Assistance to persons <ul style="list-style-type: none"> <input type="checkbox"/> Guidance and counselling <input type="checkbox"/> Training <input type="checkbox"/> Training on work place <input type="checkbox"/> Work placement <input type="checkbox"/> Job rotation and job sharing <input type="checkbox"/> employment aids (+ for self-employment) <input type="checkbox"/> Integrated measures (pathway to integration) <input type="checkbox"/> Assistance to structure and systems and accompanying measures <ul style="list-style-type: none"> <input type="checkbox"/> Employment creation and support <input type="checkbox"/> Training of teachers, trainers and staff <input type="checkbox"/> Improvement of employment services – Recruitment structures <input type="checkbox"/> Conception for training programmes - certification <input type="checkbox"/> Anticipation of technical changes <input type="checkbox"/> Work organisation, improvement of access to work place <input type="checkbox"/> Guidance and social services <input type="checkbox"/> Awareness raising, information, publicity <input type="checkbox"/> Studies and analysis of discrimination features 			
		II. Transnational activities			
		<input type="checkbox"/> Exchange of information and experiences <input type="checkbox"/> Parallel development of innovative approaches <input type="checkbox"/> Import, export or adoption of new approaches <input type="checkbox"/> Joint development <input type="checkbox"/> Exchange of trainees/trainers/staff			
		Total		100 %	

G5.	National and transnational work	Text field
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G6.	National and European level networking	Text field
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Annex 3.1 Assessment criteria for Development Partnerships selection

General criteria	
1. Innovation	<p>1.1 How does the approach pursued by the DP in delivering inclusive employment policies differ from current practice</p> <p>1.2 What are the main barriers and obstacles that have others prevented from pursuing this approach?</p> <p>1.3 To which extent the activities of the DP will fit with the chosen EQUAL theme (themes) and innovation fields outlined in CIP?</p> <p>1.4 How DP work programme will take into account of the need to develop or carry out innovative activity?</p>
2. Partnership	<p>2.1 What is the added value which the partners contribute to the DP?</p> <p>2.2. Are relevant stakeholders and disadvantaged groups represented in the DP ()?</p> <p>2.3 How the DP will take forward an effective "partnership approach" in designing, developing and implementing the work programme.</p>
3 Transnational Partnership	<p>3.1 What is expected from the transnational cooperation (what does it propose to offer, what does it expect to gain)?</p> <p>3.2 What does the DP wish to collaborate on?</p> <p>3.3 How transnational cooperation will add value to your proposed DP activity</p>
4. Dissemination and networking impact	<p>4.1 What is the expected potential for transferring the results of the DP to other actors, and into policy and practice?</p> <p>4.2 What are the basic activities foreseen for validation, dissemination and transfer.</p>
5. Empowerment	<p>5.1 How the DP will empower disadvantaged individuals and groups.</p> <p>5.2 How empowerment will take place amongst partners in the DP, and other stakeholders</p>
6. Gender perspective	<p>6.1 Do the partners in the DP have know-how in gender mainstreaming, how do they intend to acquire and practise it?</p> <p>6.2 How is a gender perspective reflected in DP and transferred its proposed operations?</p>
7. Demonstration of policy need and relevance	<p>7.1 The rationale for setting up a DP.</p> <p>7.2 Are the activities of the DP and the anticipated impact clearly devoted to removing discrimination and inequality in relation to the labour market?</p> <p>7.3 Is there a sound diagnosis of the problem(s) to be tackled?</p> <p>7.4. Explanation of the relevance of the solution(s) to be tackled</p> <p>7.5 Feasibility of the DP work plan and the planned activities</p>
Horizontal criteria	
<ul style="list-style-type: none"> ▪ promotion of the information society, ▪ promotion of the equal opportunities between women and men, ▪ promotion of local development, ▪ promotion of sustainable development, ▪ support for the victims of human trafficking, 	
Thematic criteria	
Themes	Detailed criteria

<p>6.1.1: Employability – Facilitating access and return to the labour market for those who have difficulty in being integrated or reintegrated into a labour market which must be open to all</p>	<ul style="list-style-type: none"> ▪ they are based on proper analyses of the problems of inequality and discrimination occurred at local, regional or sectoral level, ▪ offer solutions adequate for the needs of the disadvantaged groups, ▪ present models of action and methods that serve to reach a proper disadvantaged group, ▪ identify potential barriers to developing competencies that enable employment.
<p>6.1.2: Development of entrepreneurship – Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs</p>	<ul style="list-style-type: none"> ▪ develop the Polish model of social enterprises, utilising international experiences, ▪ create model of co-operation in the field of counteracting social exclusion, ▪ offer adaptation of the services to the needs of respective groups of receivers, ▪ invent models of transition from social employment onto the open labour market.
<p>6.1.3: Promotion of adaptability – Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies</p>	<ul style="list-style-type: none"> ▪ promote constitution of links and co-operation between small and medium enterprises on one side and training and research institutions on the other with the use of international co-operation, ▪ promote the lifelong learning principle, especially in relation to the evolving information technologies, ▪ promote new forms of the organisation of work that take into account the needs of the employers and the employees, ▪ promote competitiveness and productivity of small and medium enterprises, as well as sustainability of work places by improving competencies of the people subject to a particularly difficult situation.
<p>6.1.4: Equal opportunities for men and women – Reconciling family and professional life, as well as the reintegration of men and women who have left the labour market, by developing more flexible and effective forms of work organisation and support services</p>	<ul style="list-style-type: none"> ▪ offer mechanisms of sustaining the professional activity during the break in the practice of the profession, ▪ invent methods of motivating the employers to engage and develop women professionally, ▪ promote new forms of women’s work organisation, taking consideration of their family roles, ▪ contribute to the evaluation of the effectiveness of traditional methods of the professional activation of women and invent new ways of their activation.
<p>6.1.5: Asylum seekers – Supporting the social and vocational integration of Asylum-Seekers</p>	<ul style="list-style-type: none"> ▪ aim at improving the quality of the services rendered in the reception centres for refugee status applicants, ▪ strengthen the institution active on behalf of the refugee status applicants, ▪ contribute to raise social awareness and tolerance for other cultures, ▪ improve the system of analysis and prognosis of the immigration.

Annex 3.2 Data to be collected on the national level from the monitoring system (Programme indicators)

Action 1 and Action 2	
1	<p>Number of project implemented within the Programme</p> <p>Number of projects submitted (received) Number of projects rejected after formal verification Number of projects verified by the Projects' Evaluation Commission Number of signed contracts Number of projects started in reporting period Number of projects finished in reporting period</p>
2	<p>Number of DPs in general</p> <p>Number of geographical DPs</p> <ul style="list-style-type: none"> - Number of DPs working on the local level - Number of DPs working on the regional level - Number of DPs working on national level <p>Number of sectoral DPs</p> <ul style="list-style-type: none"> - number of DPs working in the economy sectors - number of DPs working in the areas with discrimination and inequality problems <p>Number of Transnational Partnerships</p>
3	<p>Total number of initially covered persons (by the age categories: 16-24, 25-49 and over 50 years old and by gender)</p> <p>Number of unemployed persons</p> <ul style="list-style-type: none"> - Number of persons long-term unemployed - Number of graduates <p>Number of persons registered in PUP (Poviat Labour Offices) as not employed job seekers</p> <p>Number of employed persons</p> <ul style="list-style-type: none"> - Number of persons employed in MSE - Number of persons threaten with unemployed <p>Number of self-employed persons</p> <ul style="list-style-type: none"> - Number of farmers threaten with unemployed <p>Number of students, PhD students, learners</p> <p>Other categories</p>
4	<p>Total number of disabled persons initially covered (by gender)</p> <p>Number of persons with physical disability Number of persons with psychological disability Other categories</p>
5	<p>Number of persons initially covered by the Programme (by the level of education and gender)</p> <p>Number of persons with incomplete primary education Number of persons with primary education Number of persons with college education Number of persons with secondary education Number of persons with vocational education Number of persons with high vocational education Number of persons with high education</p>
6	<p>Number of persons initially covered by the Programme (by the place of live and</p>

	gender) Number of persons living in urban areas Number of persons living in rural areas Number of persons living in areas under restructuring Other
7	Number of persons belonging to the social categories requiring the assistance (by gender) Number of prisoners Number of alcoholics and drug-addicted undergoing treatment Number of single parents Number of refugees with integration problems Number of youth (15-25 years of age) Number of persons benefiting from social assistance system Number of persons with low skill searching for a job Number of asylum seekers Number of persons belonging to national minorities Number of persons belonging to ethnical minorities <ul style="list-style-type: none"> - Number of persons belonging to Roma community - Number of persons belonging to other minorities Other
8	Number of persons who have improved their skills because of the Programme (by gender) Number of persons who have improved their skills in the IT Number of persons who have improved their skills in other sectors
9	Number of persons who have given up participating in the Programme (by gender) Number of unemployed persons Number of employed persons Other
10	Number of hours spent on average by the ultimate beneficiary in the Programme (by gender)
11	Number of persons who admit having benefited from the Programme
12	Number of ultimate beneficiaries classified by place of employment in the Programme start (by gender) Number of persons employed in small and medium enterprises Number of persons employed in large enterprises
13	Number of enterprises covered with the support in relevance to the time the enterprise has been operating (till 6 months or over 6 months) Number of small and medium enterprises Number of large enterprises
14	Number of institutions covered with the support Number of public labour market institutions Number of non-public labour market institutions Number of schools and public life-long learning institutions Number of non public training institutions Number of social assistance institutions
15	Number of employees covered with the support (by gender)

16	<p>Type of aid supporting persons (by gender)</p> <p>Job seeking assistance</p> <ul style="list-style-type: none"> - vocational counseling - job placement <p>Training</p> <p>Individual operational plans</p> <p>Postgraduates studies</p> <p>Counseling for the persons planning to start up business and business start-ups</p> <p>Grants</p> <p>Subsiding of the employment-related costs</p> <p>Scholarships for students, PhD students and learners</p> <p>Fellowships for the graduates</p> <p>Flexible or alternative forms for employment</p> <p>On-job-training</p> <p>Vocational practice</p> <p>Tutor in the course of vocational mobilizations and for persons planning to starts up business</p> <p>Other</p>
17	<p>Type of aid supporting systems and structures (by gender)</p> <p>Creating and maintaining jobs</p> <p>Trainings for the trainers</p> <p>Working out the new employment and requirement services</p> <p>Working out the methodology of trainings</p> <p>Foreseeing technological changes</p> <p>Organization of work and increasing access to the labour market</p> <p>Counseling and social services</p> <p>Information and promoting activities</p> <p>Research and analysis in the area of inequality and discrimination</p> <p>Other</p>
18	<p>Type of accompanying activities implemented (by gender)</p> <p>Care of dependants</p> <p>Tutor's assistance during the training</p> <p>Fellowships for graduated</p> <p>Training allowance</p> <p>Allowance for persons planning to start up business</p> <p>Provision of the transport to the training place</p> <p>Covering the costs of providing the disabled with the necessary individual technical facilities</p> <p>Provision of technical and functional facilities</p> <p>Counseling (other than vocational)</p> <p>Counseling for enterprises</p> <p>Other</p>
19	<p>Percentage of persons, who have received support within the framework of the Programme compared to persons, who notified their willingness of participating in projects implemented within the Programme</p>
20	<p>Percentage of institution / enterprises, which have received support within the Programme compared to applying institutions / enterprises, which notified their willingness to participate in projects within the Programme</p>
<p>Action 3</p>	

1	<p>Performance of activities</p> <p>Researches, reports and publications</p> <p>Evaluation research</p> <p>Promotional materials</p> <p>Information materials</p> <p>New networks for cooperation</p> <p>Web pages</p> <p>Training, workshops and conferences</p> <p>Other</p>
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Annex 4 EX-ANTE EVALUATION OF EQUAL COMMUNITY INITIATIVE PROGRAMME FOR POLAND

1. INTRODUCTION

This ex ante evaluation of the EQUAL CIP for Poland refers to the rules applying to evaluation of this kind in accordance with the *Commission Communication* on the EQUAL programme. The main objective of the ex ante evaluation is:

- to verify that the EQUAL document comprises all the elements necessary for a good description and proper justification of the selection of priorities, and comparable to the contents of the EQUAL documents for other states
- to verify that the strategy presented in the document is coherent
- to assess in what way the document is relevant to the national policy
- to evaluate to what extent the document makes use of the previous output of the policy to counteract discrimination and to restrict social inequalities
- to evaluate the relevancy of the proposed project implementation, of its monitoring, and of its assessment at various stages of implementation
- to assess potential results of the implementation of the EQUAL document

The EQUAL programme implementation is of an enormously important significance, if only for this reason that it focuses on the particularly difficult issues in social terms. They comprise the questions concerned with social exclusion or the questions of discrimination and inequalities, caused both by the disproportion of the social development and by the perpetuated, culturally rooted stereotypes.

The rule, adopted in the methodology of the EQUAL document development, of following the 6 principles by the document is also essential.

The principle of THEMATIC APPROACH refers to the thematic fields identified by the European Commission, related to the objectives and pillars of the European Employment and Social Integration Strategy. The principle of PARTNERSHIP is of important meaning in the context of the method of implementation of operations, but it also brings value added that might result in co-operation of social partners focused on development. In consequence of deeply conceived partnership there comes the principle of EMPOWERMENT – INVOLVEMENT OF THE DISCRIMINATED GROUPS in all the actions of the project: starting from the programming phase up to the implementation. Important for generating a value added of the project – there is the principle of TRANSNATIONAL CO-OPERATION, which makes it possible not only to help each other and co-operate, but also to promote good

practices. What is even more important as the objective of the project, in accordance with the principle of INNOVATIVE APPROACH – is to develop new solutions, modes of action, worth further dissemination. At the national level this dissemination is related to the application of the principle of ADAPTATION OF THE PROGRAMME RESULTS TO NATIONAL POLICIES (MAINSTREAMING). Adherence to the above mentioned principles was fundamental to the developed document.

One should remember that the Community Initiative EQUAL has been prepared for implementation in 2000 – 2006. On accessing the European Union, Poland joins with it the implementation of the programme in its final phase – trying to fulfil all the formal and programming requirements. The works on the EQUAL document have been going on during the unusually important programming period. This is the time of discussion over the implementation of the Sectoral Operational Programme Human Resources Development, which in 2004 – 2006 will be providing support from the European Social Fund resources not only for attaining the objectives of the National Development Plan, but also for fulfilling the tasks of the new labour market policy. The new labour market policy brings answers to the programme challenges of the European Employment Strategy, though first of all, it raises the pressing problems of the labour market of the recent years. As an expression of this policy stands a completely new Law on Employment Promotion, being prepared for application from January 2004. This is also the time for the development of a first document under the social inclusion strategy (JIM – Joint Inclusion Memorandum).

All these programming works constitute an important element of the Polish system transformation, in which process since 1989 Poland has been transforming the rules of public life, the fundamentals of the economic functioning, the objectives of broadly understood social policy, and the conditions for its attainment.

In this sense, the effort devoted to the programming and the future implementation of the EQUAL document is an important component of the structural, systemic changes in the Polish social policy. It is of interest here to look at the very definitions of the notions „discrimination” and „inequality”, as well as at the actual grounds for the emergence of the phenomena related to the notions. The behaviour, processes, phenomena of a discriminating character have their roots in the attitudes and stereotypical cultural models. On the other hand, social inequalities are of double nature. On the one hand, they are result of the growing social disproportion during the transformation (widening income rifts, dualism of the situation related to access or lack of access to employment, enormous gaps in qualifications and education levels). On the other hand, they arise from the deepening civilisation backwardness,

which is particularly apparent in the comparison of the situation of the urban area residents with that of the rural area residents, as well as of various regions of the country. And it is also present in the division into social layers as a result of the world IT revolution, brought after all to Poland.

Therefore, perhaps, even more important for the whole process of developing the EQUAL is the participation therein of representatives of the socially discriminated potential participants, project providers and beneficiaries.

2. EVALUATION OF THE DOCUMENT STRUCTURE

In compliance with the provisions of Paragraph 61 and 62 of the Commission Communication, the content of a project (document) should include the following areas:

- the description of the current situation in the labour market from the perspective of discrimination and inequalities

This is presented in Chapter 2 (LABOUR MARKET) that takes into account the general economic context, demographic conditions (as it is a very important question because of the demographic boom generation entering the labour market in recent years), characteristics of the basic parameters of the labour market - including employment, but also assessment of the qualifications and skills of the Polish labour force. The area of social economy is also presented – from the perspective of pointing out both the activities of non-governmental organisations and the grounds for economic operations in the field of social economy. The collection and proper interpretation of the data related to the field was not an easy task. The method of presentation of the labour market problems in relation to employability should be acknowledged. It characterises in detail the factors increasing the danger of discrimination and inequalities because of education level and education access, age in relation to actual and potential vocational activity, long-term experience of unemployment, disability, place of residence (limited access to education and employment in rural areas), national and ethnic origin (including the conditions for assimilation of repatriates. A separate part presents an analysis of the conditions defining the lack of gender equality and lower opportunities for women in the labour market, including the precise data related to the differences in salaries by gender in relation to education level.

- estimation of the expected results of actions in the socio-economic field with reference to the regional and sectoral impacts, as well as in terms of gender equality

Annex No 3 of the document concerning the data collected on the national level in relation to the tasks carried out under the EQUAL programme enables us to envisage the

range of the expected results in quantitative terms (with particular attention to the effectiveness of women's participation in the planned operations). It seems, moreover, that because of the specific character of Poland's joining the implementation of the programme, the present estimation of the expected results shown in the part 4.2 shall be supplemented during the implementation of the project, after the forms of partnership are selected, as this might determine the final results. It is important for the EQUAL Initiative, however, to work out new models of co-acting in co-operation and involvement of the groups of potential beneficiaries. Implementation of the project – both in time and in relation to other projects financed by the European Social Fund, as well as its institutional location (the Ministry of Economy, Labour and Social Policy) – warrants proper adoption of the programme results in the future national policies.

- description of the strategy of implementation of the general objectives of the EQUAL project in relation to the national priorities of the project

The four thematic fields (identical with the pillars of the European Employment Strategy) of the EQUAL Initiative comprise the eight objectives plus the additional one covering the specific needs of asylum seekers. From the exposition contained in the analytical part – Chapter 2 – it follows the justification for selection of the priority themes presented in Chapter 4 (in particular – 4.1). In effect, the themes recommended for implementation do not comprise the priority theme no. 2 (combating racism and xenophobia in the workplace), the priority theme no. 3 (opening up the business creation process to all), the priority theme no. 5 (promoting lifelong learning and inclusive work practices that encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market) and the priority theme no. 8 (reducing gender gaps – although the selection of the priority theme no. 7 actually determines that this objective shall be in practice realised). The priority theme no. 9 has gone modification – in view of the Polish specific situation, it is suggested that we should concentrate more on the problems of repatriates.

- description of the relationship between EQUAL document and other programming documents of related thematic scope (National Development Plan, Sectoral Operational Programme Human Resources Development, etc.)

Chapter 3 of the document - „Political context to undertake activities within the EQUAL Initiative” – contains short descriptions of the basic programmes that constitute the basis of reference for the implementation of the EQUAL programme. They concern the National Development Plan and the related sectoral programme, as well as other programming documents. The whole part 3.3 of Chapter 3 is devoted to description of various governmental

programmes and legal requirements for the performance of programming tasks, also those implied by EQUAL. Thus, it enumerates the programmes for education reforming, strategies of lifelong learning, analyses such as JIM that allow for synthetic presentation of the problem of social exclusion in Poland, or expositions and programming guidelines of a smaller scale. As for the issues related to supporting employability, it would be worth updating the description with new documents and solutions (adopted in the summer and early autumn) – as they are of significant importance.

- description of the priority themes and description of the related measures

The analyses presented in Chapter 2 in a very precise way constitute grounds for selection of the priority themes, perceived also as complements to the objectives and measures comprised in SOP HRD. Chapter 4.1 contains the description of measures and justification of their selection, and it points out the target groups of potential beneficiaries of the measures, as well as the forms of measures with emphasis on the innovation of the undertaken actions. In general, one might make just one critical remark – is it not the case that because of the high unemployment in Poland and the need to make up for many years of civilisation backwardness, the number of the groups of potential beneficiaries identified in the EQUAL programme is too high? Will it not diminish the impact of the programme and its effectiveness?

- technical assistance and organisational requirements of the implementation of the EQUAL programme

Chapter 7 of the EQUAL document presents in a clear manner the mechanisms of management of the implementation of the project, identifying national authorities, the procedures of submitting applications, the mechanisms of the selection of projects, the rules and forms of reporting. In the description of the actions (Chapter 6) in order to cover creation of partnership, a strong emphasis has been also placed on action 1 qualifying as a preparatory one – so there should be clear rules of the creation of development partnerships. The part 6.4 brings description of the technical assistance necessary for the initiation and implementation of the project, with reference to legal bases – it also presents an indicative budget accounting in percentage terms for expenses from the technical assistance fund for each of phases - actions of the implementation of the project. The information about the scale of expenditure for technical assistance is given in Annex No 1.

- presentation of the detailed financial plan of the EQUAL project with division into priority tasks and dates of their realisation in the planned period as well as the own contribution of Polish partners

The rules of financing in co-operation with Polish institutions and the European Union have been presented in detail together with legal references in Chapter 8 of the EQUAL document. The complete set of information about the indicative financial plan has been comprised in Annex No 1. At this stage of the EQUAL project preparation it is not possible to enumerate components of the Polish public contribution divided into national governmental and self-governmental resources – one should also remember that the project actually begins in 2005. It is also difficult to decide whether national financial resources from the private sector might participate in the operations (and on what legal grounds). Also important for the implementation of the project is the plan of allocation of funds for particular measures, which has been presented in part 4.4, i.e. in the chapter on the priority themes.

- description of actions and methods aimed at restricting gender discrimination

The starting point for the selection of measures under the EQUAL programme aimed at realisation of this tasks are analyses of the labour market made in view thereof in part 2.2.4, in particular in the last paragraph devoted to synthetic description of the most important factors responsible for the relatively worse situation of women on the labour market. Part 3.3.10 brings description of the measures taken at the moment to eliminate gender discrimination on the labour market. One should emphasise the cohesion of the presented analyses and the selected priority themes, the fourth of which (described in part 4.1.4) concerns equality of men and women. And the measure has been formulated as follows: „Reconciliation of occupational and family life and re-inclusion of women and men who have left the labour market by the development and promotion of flexible forms of employment and work organisation, and complementary activities”. Paying attention to the legislative aspects (changes in the Labour Code), concerned with education level and access to it (while emphasising the paradoxical character of the fact that women have been achieving higher education level for more than ten years in Poland) and family circumstances – it points out the directions of the suggested measures, i.e. further legal changes, promotion of new models of labour, life, and employment – more adjusted to the modern economy, the aspirations of women, etc. A methodology of integrated achievement of gender equality is comprised in fragment 5.7, which presents the way this objective fits horizontally into all the measures of the EQUAL Initiative – and gives criteria that should be kept in mind while implementing the project: the number of men and women in the target group of a given measure, taking this matter into account by the methods of implementation, as well as being aware that many discriminating behaviours are culturally rooted, and their correction with legal measures should be accompanied by proper promotion of new attitudes. The project contains the

information that a detailed plan of application of the mechanisms facilitating achievement of gender equality shall be presented at a later stage of the works on the document and its implementation, which is justified by the innovative character of the project.

- relation from the programming process

The document contains in the introduction – Chapter 1.3 – information about the proceeding of the programming process. It stresses the role of the Working Group for EQUAL and the role of non-governmental organisations acting within this body. Since spring 2003 training has been delivered about the EQUAL Initiative, which – the closer and closer is the date of the implementation of the project – the more it is concentrated not only on the selection of themes, but also on practical aspects of the implementation. The debate has also been conducted about the forms of partnership organisation (a key issue for the project) and the formula of partnerships. Should these be partnerships of a smaller scale and projects of lower budgets, or rather partnerships of a larger scale with a pronounced leader and bigger budgets and „umbrella” formula? Settlement of this question is important for the concept of the implementation of EQUAL in Poland.

- presentation of the objectives concerning the implementation, monitoring and evaluation of the project

The stages of the implementation of the EQUAL project divided into actions (three key periods: setting up of a development partnership, implementation of a project, dissemination of good practices and models of activities by way of their adoption by the national policy) are characterised in Chapter 6. And the next chapter describes institutional aspects of the implementation, procedures, structures responsible for the implementation, including the role of the Managing Authority, National Support Structure (Section for EQUAL in the respective Department of the Ministry of Economy, Labour and Social Policy) and the Monitoring Committee. Chapter 9 of the document informs about the rules of monitoring, data collection and reporting framework. Annex No. 2 informs about the data collected for the EQUAL Common Database and Annex No. 3 about the data collected at the national level. Chapter 10 gives description of the method of evaluation of the project at its particular stages. One should remember that a key value for a full evaluation it is to review to what extent the assumptions about the effects of the project impact (4.2) prove realistic and to what degree the main objective of EQUAL shall be achieved, i.e. to promote new solutions and to make them components of national policies of the labour market and social inclusion.

- information about the method of popularisation of the project and the informational access of all the parties concerned to the requirements of the project

This is specified in part 7.3 and results from the promotion of the EQUAL project currently carried out together with social partners and self-governments and non-governmental organisations. A wide participation of different organisations and institutions in the programming of the project, the selection of priority themes, training that is also of the nature of a debate about the terms of possibly most effective implementation of the priority tasks – all this contributes to the promotion of the project.

- types of contracts with final beneficiaries

Part 7.3.4 comprises general information about contractual provisions with Development Partnerships being entities that carry out the project. The way of coming to an Agreement on Partnership has been described in part 7.2. It is not fully determined of what scale partnerships will be established – this leaves a possibility to create a partnership as an organisation for purposes of implementation of one project, or an organisation of an „umbrella” character for purposes of a higher number of sub-projects. It seems that such an open formula makes sense and is well adjusted to the expectations of the Polish non-governmental organisations. In the specific Polish case – because of our little experience in setting up partnerships as a method of action – it is important who shall be the initiator and leader of a partnership. This should become subject of training to promote EQUAL and prepare its implementation.

- description of national mechanisms of support for the process of adaptation of the programme results into national policies (mainstreaming)

In general, the aim of such adaptation process has been covered in several parts in the document, including part 5.6. These are, however, its general rules. It seems that it is too early – apart from the obvious promotion of the innovative solutions and action models generated under EQUAL – to describe methods of transferring knowledge about the achievements of the programme. It is also important whether the members of the Monitoring Committee and the National Support Structure will be able to play such a role, and whether the initiation of the programming activities of SOP for the next period will co-ordinate in time with the possibility to use the results of the EQUAL project.

- organisation of the works of the Monitoring Committee in such a way that it be involved in the matters of counteracting discrimination and inequalities

The selection of the members of the Monitoring Committee (specification of its main functions is stated in part 7.1.3) has been planned in the context of the whole EQUAL project in such a way that it will ensure participation of the most important, from the point of view of the objective implementation, institutions and organisation. The Committee, headed by the

Minister of Economy, Labour and Social Policy, shall also work out its own working regulations. It is important that its members should have knowledge about the issues of the EQUAL programme. Nevertheless it does not mean that they themselves should have experienced discrimination or unequal treatment.

- characterisation of the data necessary for monitoring and evaluation of the process

The data set needed for the EQUAL Common Database has been presented in the questionnaire found in Annex No. 2 – these are the key data, essential to the characterisation of Development Partnerships. Thanks to them it will be possible to keep constant monitoring of the implementation of the project, as well as to estimate its effectiveness. Annex No. 3 comprises a list of indicative data collected at the national level that allow for practical evaluation of the effectiveness of the adopted measures.

x x x

In general one should state that the structure of the text of the programming document EQUAL for Poland complies with the formal and substantial requirements set for the European implementation of the project.

3. EVALUATION OF THE SELECTION OF TASK SCOPE OF THE PRIORITY THEMES IN THE CONTEXT OF OTHER DOCUMENTS

A reliable analysis of the situation on the labour market in Poland from the perspective of the problems of „inequality” and „discrimination”, which is comprised in Chapter 2 and 3 (by description of the already adopted measures), constitutes a good basis for establishment of the thematic priorities of the EQUAL project. As important points of reference stand 4 documents:

- National Development Plan for 2004 – 2006
- Sectoral Operational Programme Human Resources Development
- Joint Assessment Paper (JAP) of Employment Policy
- Joint Inclusion Memorandum (JIM).

Each of them reveals an area related to social inequalities and discrimination on the labour market or in the access to various social goods. The key point for understanding the most important challenges of the Polish labour market is the SWOT analysis included in SOP HRD (of weaknesses and strengths, threats and opportunities present in the labour market) – its text is given in Annex No. 1 of this ex ante evaluation. It also seems that the SWOT recommendations overlap with the areas in particular danger of social exclusion, identified in the JIM document. In effect, such issues as:

- development of a labour market accessible to all and promotion of employment as a right and opportunity (it concerns people with low qualifications, returning to the

labour market after a long break, long-term unemployed, young people starting their professional life during demographic boom, elderly people at risk of unemployment or permanent deactivation, disabled people encountering unusual difficulties in finding employment in the open labour market, members of national minorities and repatriates)

- guaranty of equal access to services (health protection system, access to transportation increasing mobility, access to social services – social assistance, opportunity to change accommodation or its purchase first of all, access to all levels of education, even if provision of financial support is required)
- activation of the regions troubled with the problems of civilisation and economy backwardness (it concerns the regions of old industries or of former state-owned farms)

became of key value for the process of selecting priority themes of the EQUAL project, connected at the same time with the conclusions drawn in the SWOT of SOP HRD (which, in turn, recalled the recommendations presented in the JAP document).

The common elements of threats and weaknesses from SWOT, reconsidered and formulated anew in the context of programming the objectives of the EQUAL Initiative might be put as the following problems:

3.1. INITIATION OF RESTRUCTURING RURAL AREAS AND AGRICULTURE (potential results of this process).

This theme happened to be neglected in various editions of the labour market policy, which does not mean that the question has not been addressed at all, but there are not any complete strategies. Yet, in this area one can perhaps see culmination of the problems related to inequalities and discrimination. Key matters that impede undertaking of the problem of restructuring rural areas (and which might perhaps find pilot and model treatment in EQUAL) are as follows:

the lack of modernisation habits among the social elite of rural community

a growing feeling of social exclusion among many groups of rural area residents and a danger of emerging a binary social system in Poland (differentiating development opportunities): urban - rural

an ingrained habit of a claimant's attitude towards the state and its institutions

the lack of a apparent leadership at various levels, if any – these are leaders unready to modernising actions

the lack of inclination to the long-term character of the process of the transformation of Polish rural areas and agriculture

human resources: low qualifications, limited possibilities of educational and professional

promotion, low mobility.

CONCLUSION: As this theme is scarcely emphasised in the programmes of labour market in a complete way, its undertaking – even partial – might offer an „opportunity”.

3.2. POLICY TOWARDS THE GROUPS OF SO-CALLED LOW EMPLOYABILITY (under high risk of long-term unemployment, danger of exclusion).

This is a phenomenon well described together with conclusions drawn – in various programming documents of the labour market. One can, however, bring up the following questions:

Have we fully diagnosed all the niches in which these dangers occur (the disabled and the alcohol and drug-addicts)? And can we take use of and promote the models of working with these groups in such a way that the Development Partnerships emerging under the EQUAL project might make full use of this?

What model of measures for the labour market inclusion should be chosen and applied? Does it not require a detailed description of the sequence of measures taken, so that their costs (potentially high) might be fully assessed? EQUAL precisely might become a pilot project in this area.

How to solve the problem: whether with this issue of work with „the low-employable” one should concentrate on the social groups, the threatened communities, or on the process of inclusion of these people and groups in the labour market – for these are slightly different orientations requiring different instruments.

CONCLUSION: The theme of the „low-employable” has been already presented in SOP HRD. There is no doubt that the expansion of the group of „low employability” constitutes a large danger, and the lack of an effective system of counteracting the phenomenon is a „weakness”. But careful development of a model / process of working with such groups (even with the most difficult of them), carried out as a pilot measure in the EQUAL formula, might become a good example, worth adopting in future national policies.

3.3. LIFE AND PROFESSIONAL START OF THE YOUTH (key challenges from the point of view of building not only the present but also the future social cohesion in Poland).

This theme is well researched, treated as a priority in the programming documents concerning the labour market, included in the measures of SOP HRD, with approved financial support – also in the current policy of the labour market. If there is still some need, it is a limited scope and strength of so-called soft measures that are to counteract negative effects of educational boom in Poland. Nevertheless this is a task for implementation at the junction of education and labour market.

CONCLUSION: One should thus find in the EQUAL project specific tasks, e.g. to assist in the professional start of the youth who stand at risk of encountering particular difficulties for social reasons (dysfunction of families, poverty threat, social maladjustment).

3.4. DANGER OF DUALISM OF THE LABOUR MARKET IN POLAND (jobs for the better educated / no job for the worse educated).

The diagnoses of the labour market, on one hand, emphasise „opportunities” resulting from the improvement in the quality of qualifications of the Polish human resources, on the other hand, one should note that a part of the resources does not have either access or need to take the opportunity to improve their qualifications, which is a „weakness” and creates a „threat”. A balanced policy requires stimulation of two parallel directions of activities and action

framework:

one that would concern strengthening of the potential and using of the readiness to increase innovation in Polish companies – training for employees, lifelong learning institutions, flexible law encouraging new forms of employment and effective use of the intellectual capital of „specialists”

another that would concern creation of a framework for working in the sphere e.g. of social economy for people requiring to be guided in the process of social and professional re-inclusion – and support of the framework for sustaining labour-consuming jobs in the economy, which leads to social employment.

CONCLUSION: This very bidirectionality would allow for the preparation under the EQUAL project of actual programmes to prevent from the danger of dualism. Thus, on the one hand, some projects would be inclined to concentrate on guiding the simple work, on the other hand other projects would allow for supporting the development of innovation and adjusting the skills of employees to the requirements of the modern economy and technology.

3.5. WEAKNESS OF THE INSTITUTIONAL SERVICES FOR THE LABOUR MARKET (public employment services against the challenges related to assisting the groups of unemployed of „low employability”).

This question is generally very well researched. In result of the diagnosis, proper measures have been specified (I.1.) under the priority I of SOP HRD. In the SWOT analysis for the sectoral programme the condition of the public employment services was the reason to judge this area as „weak”. It seems, however, that the long-term lack of any improvement in the functioning of these services in the fields concerning:

the number and quality of employed, also in relation to the number of potential service beneficiaries

the professional background to meet the challenges of the active labour market policy (including the work with so-called difficult clients, which requires individualisation of their formation plans), which should also mean an increase in employment in the employment service: job placement officers, vocational counsellors and labour market animators

the stability of the financial planning of expenditures from the Labour Fund – not only in the terms of one year, but in view of several years, in order to combine better the national and the European Union resources for particular operations

the opening of the employment services to actual co-operation with social partners and the environment of the labour market – i.e. establishing mutual trust between the labour offices and non-governmental organisations, self-governments, or non-public institutions of the labour market

a better co-operation of the employment services with the business world, as well as with these sectors of economy that are not focused on profits and constitute fundamentals of the Polish social economy

might only result in loss of other advantages and create a „threat” in the form of impossibility to undertake many other tasks, or even of fulfilment of their own fundamental functions.

CONCLUSION: From the point of view of the EQUAL programme it would be important to make use of the role of the employment services in setting up Development Partnerships – as a key element of actions undertaken, or a „silent supporter” in setting up such a partnership. On the other hand, however, it is worth remembering that the structure of „partnerships” must be more complex. Then, thanks to the unique effect of „value added” coming from the

functioning of such a Partnership – as a particular entity of co-operation – it will be possible to work out unique models of action that in future might be adopted in general solutions of the national policy.

3.6. DISCRIMINATION AND INEQUALITY ISSUES (considered in the light of the conditions of social attitudes, a kind of stereotyping of behaviours of some groups – in particular towards women, people of other origin, e.g. Roma people or Belorussians, refugees or repatriates).

The significance of the actions allowing curbing inequalities and achieving equality has been explained many times – and this problem has been addressed in the priorities and actions under SOP HRD. It is worth to remember, however, when taking various programming measures, about:

implementation of new legislation related to the minority rights (monitoring, review evaluations)

creation, apart from the law, or even better in connection with the law – of new culture customs (e.g. behaviour towards women at work)

economic stimulation in order to balance professional statuses

stimulation to allow for possibility to combine vocational work with family duties (a better day-care for children allowing for taking decision on reconciling a job with family functions)

creation of the programmes of vocational re-inclusion for the people after a long break in their occupational activity, or for the people attempting to find their place in a given labour market – with language problems, cultural, legal barriers, etc.

CONCLUSIONS: The lack of a definite policy to restrict inequalities and discrimination may fix the negative, „dangerous” phenomena that is the lack of social cohesion. As some of the projects in this field must be open to breaking social stereotypes, it seems of essence that the EQUAL programme might offer new models of the procedure, verified in actual projects implemented in particular areas – ready to be spread and disseminated.

x

x

x

Much more important and significant than in the case of the priorities and actions of the Sectoral Operational Programme Human Resources Development is in the case of the implementation of the EQUAL programme the question of the involvement of various social partners in the issues of employment and social policy. After all – partnership constitutes here an organisational and substantial fundament. This brings us to emphasising the specific and exceptional character of the EQUAL Initiative.

Assuming that the strongly underlined in SWOT for SOP HRD „weaknesses” are as follows: the large scale of labour resources of low qualifications, a growing number and the phenomenon of long-term unemployed on the verge of exclusion, not ready to be active and make effort towards mobility and achievement of new qualifications, and thus posing the risk of permanency of their exclusion at least outside the labour market – then all the priority themes in EQUAL should thus address the problem of improving the situation of those groups and people. Inclusion in the labour market, stimulation of the „low-employable”, looking for employment forms and job for them e.g. in the social economy, and educating them with the help of specialised groups of professionals (appointed by a local coalition, a development partnership) and NGO-s – all this is in result present in Measure 4.1.1 and 4.1.2, as well as

4.1.4. and 4.1.5 of the EQUAL programme.

In this, therefore, context, the priority themes and measures identified in the EQUAL programming document:

4.1.1. PROMOTING LABOUR MARKET OPEN FOR ALL BY FACILITATING ACCESS AND RETURN TO THE LABOUR MARKET OF PERSONS EXPERIENCING DISCRIMINATION.

4.1.2. STRENGTHENING THE NATIONAL STRATEGY OF SOCIAL ECONOMY BY IMPROVING THE QUALITY OF JOBS IN THE SERVICE SECTOR AND DEVELOPMENT OF SOCIAL ECONOMY

4.1.3. SUPPORTING THE ADAPTABILITY OF FIRMS AND EMPLOYEES TO STRUCTURAL ECONOMIC CHANGE RESULTING FROM DEVELOPMENT OF NEW TECHNOLOGIES BY DEVELOPING THEIR SKILLS AND INTRODUCTION OF NEW MANAGEMENT METHODS

4.1.4. RECONCILING FAMILY AND PROFESSIONAL LIFE, AS WELL AS THE RE-INCLUSION OF MEN AND WOMEN WHO HAVE LEFT THE LABOUR MARKET, BY DEVELOPING AND PROMOTION OF FLEXIBLE FORMS OF EMPLOYMENT AND WORK ORGANISATION, AND SUPPORT SERVICES

4.1.5 HELPING THE LABOUR MARKET INTEGRATION OF ASYLUM-SEEKERS, REFUGEES AND REPATRIATES

should be considered very well selected and justified.

4. COHESION AND COMPLEMENTARY CHARACTER OF THE PLANNED MEASURES

One of the most important question in the programming of the EQUAL project was such a selection of the priority themes and measures that would not only meet the most important challenges of the Polish labour market from the perspective of discrimination and inequalities, but that would also supplement the already adopted operations.

The aim of the analysis presented below is to show the supplementary character of the themes and measures that will be implemented under the EQUAL programme – in relation to the measures taken under the national policy, implied either by SOP HRD or the followed nevertheless labour market policy, educational policy, social policy, policy towards the disabled and policy for gender equality.

To show the principle of complementarity more clearly, we shall start the description with the target groups of the labour market programmes and social inclusion programmes.

4.1. GENDER EQUALITY

the larger scale of women losing jobs for employers' reasons, especially in restructuring processes

stereotypical perception of occupational roles of men and women (domination of offers traditionally identified as concerning male occupations)

a larger tendency of the employers to recruit men because of their recognised accessibility

striking disproportions in wages/salaries at the same jobs (especially in relation to persons with high education)

long-term vocational inactivity of women – multiannual breaks in employment, lower

employment rate, higher inactivity rate

difficulties in reconciling vocational work with the family role for cultural reasons and the lack of infrastructure and legal solutions supporting the reconciliation of these functions

the poor introduction and dissemination of the forms of more flexible employment for women

NATIONAL POLICY

representational, political and programming functions of the Office of the Government Plenipotentiary for the EQUAL Status of Women and Men

activating programmes, supporting vocational re-starting of women in the field of the market policy, financed by the Labour Fund

a special Measure (I.6. – Vocational integration and re- integration of women) in SOP HRD

fulfilment of the tasks of the II stage of the National Action Plan for Women

the policy of transposition of the EU equality directives into the Polish law (including the changes in the Labour Code)

activities of the National Labour Inspection for the implementation to the principle of equal treatment (reported in 2004)

EQUAL

promotion of employee's rights for women

creation of legal and, first of all, organisational and material conditions to enable women to combine vocational and household functions (at the level of local decisions)

creation of proper conditions to use the flexible forms of employment of women

promotion of entrepreneurship of women

development of the mechanisms to sustain vocational activity of a woman over a break in her vocational life – to make employers interested in such measures

support for the infrastructure that helps in returning to work after a break (training, activation)

4.2. LONG-TERM UNEMPLOYED

a large scale of long-term unemployment in Poland

cumulating of the following features: low education, older age, being a woman, or being a resident of economically backward regions – which limits possibilities of activation

a weaker emphasis placed by the public employment services on supporting activation of the long-term unemployed

loss of practical occupational skills and a radical decrease in the mobility level

the escapist attitude – looking for permanent deactivation or work in the „grey sector”

high costs of the programmes for long-term unemployed as compared with its relatively low effectiveness

NATIONAL POLICY

a special Measure (1.3. – Counteracting and combating long-term unemployment) in SOP HRD

a possibility to use the measures and funds of the ESF allocated for the implementation of Measure 1.5 under SOP HRD (counteracting social exclusion of the long-term unemployed –

24+ programme)

taking into account in the recommendations of the JIM document the problems and needs for supporting people in danger of social exclusion for the reasons of long-term unemployment

enactment of the Law on Social Employment and establishment of the Centres of Social Integration focused, for example, on assisting the long-term unemployed (longer than 36 months)

strengthening of the function of vocational informing and guiding in order to cover the long-term unemployed with the offer of lifelong learning (Measure 1.1 of SOP HRD and the governmental Strategy of Lifelong Learning for 2003 – 2010)

EQUAL

promotion of the labour market open to all, in particular to people of a disadvantageous situation in the labour market for many reasons, including long-term unemployment (Measure 4.1.1)

access to vocational information, counselling, support for activation – actions organised and undertaken within the frames of Development Partnerships

an offer of special training services for the groups of so-called low employability

making use of the development of social economy in recruiting persons with lower qualifications and less active, because e.g. of their long-term unemployment (Measure 4.1.2)

4. 3. PEOPLE WITH LOW EDUCATION LEVEL

a relatively large share of the people with low qualifications in the labour resources, in particular of older generations and rural area residents

the lack of any developed infrastructure of the adult education to enable them to improve qualifications (as well as of any promotion of lifelong learning)

a low share of adults in training (also of the unemployed)

dangers related to the economic disfunction which is the „grey sector” – incepting large resources of poorly-qualified labour force

correlation of the level and quality of qualification with vocational mobility, as well as with the risk of losing and being unable to find a job, which may lead to social exclusion

correlation of the qualification level with the chances for payment growth

NATIONAL POLICY

promotion of improving education level and qualifications

initiation of reforming the education system to improve the quality of teaching in Poland and to improve the scholarisation indicators

development of the model of lifelong learning (Strategy for Development of Lifelong Learning until 2010)

measures taken under the Priority 2 of SOP HRD: Measure 2.1 – Adapting the educational offer of schools, university-level schools and vocational education centres to the labour market needs; Measure 2.2 – Strengthening the lifelong education system for adults; and Measure 2.3 – Development of the staff of the modern economy and entrepreneurship

works on the introduction of a Training Fund applicable in enterprises that would support improving the quality of the staff

functioning of the measures for education of adults (including the Centres for Information and Career Planning and the Centres of Lifelong Learning) in the scope of influence of the Labour Fund and the public employment services

undertaking and carrying out the tasks implied in the governmental programme „E–Poland. Action plan for the information society in Poland for 2001 – 2006”

EQUAL

under Measure 4.1.1., supporting inclusion in the labour market – developing of new system of educational support addressed to the weakest groups present in the labour market and testing the effectiveness of the measures (including training) that allow for participation in the information society

under Measure 4.1.3., e.g. improving the qualifications of employees unadjusted to the requirements of an employer by way of innovative training programmes

practical implementation of the solutions, in particular aimed at the groups threatened with exclusion and from regions of backward civilisation and economy, popularising the knowledge of ICT techniques

creation of an opportunity for refugees and repatriates to improve their vocational qualifications (Measure 4.1.5)

4.4. PROFESSIONAL START OF THE YOUTH

the demographic boom population entering the labour market in the period of high unemployment

a high unemployment rate in the groups of the youngest, also of the persons of high qualifications

social results of a failed life start in the form of impossibility to find a job after conclusion of education

differentiation of the access to education according to the conditions of living (a danger of following the model of belonging to the poverty group, social exclusion) and the place of residence (a disadvantageous starting point for the youth from rural areas)

the lack of a deepened analysis of demand in relation to the future demands of the labour market in terms of vocational skills

NATIONAL POLICY

functioning of the mechanisms favouring, at least partially, the prolongation of the learning period

a wide educational offer at the higher above-secondary level (although of various quality in many non-public schools)

the results of the reform of the education system introduced in 1999

reforming the model of school services related to vocational counselling and forming the lifelong learning habits

relatively large (even up to 40-50% of expenses) input from the Labour Fund for the special programme „First Work”

promotion of various programmes supporting employment of graduates, including the co-operation with employers and adoption for time limited of a special solution that concerns a lower minimal payment for graduates to offer an incentive to their employment

a special Measure under SOP HRD – Measure 1.2. Perspectives for youth

the programme activity of Voluntary Labour Corps aimed at supporting the youth socially maladjusted in their professional start

EQUAL

promotion and organisation of new employment forms for the youth socially maladjusted, while making use of the institutions of social economy and social employment under Measure 4.1.2.

concentration of the attention on and preparation of special projects for the youth unemployed and threatened with social exclusion from urban and post-industrial areas – Measure 4.1.1.

4.5. THE ELDERLY PEOPLE

a significant danger of vocational deactivation, having been even still in part stimulated by legal solutions (pre-retirement allowances and benefits)

a danger of social exclusion of the elderly people with low qualifications, little mobile – at a risk of being entitled to a very low pension

inability to adopt to the requirements of the market economy and the rules of the labour market

attachment to traditional forms of work and traditional occupations – which restricts possibilities to modify (especially with outdated knowledge and often useless in the modern economy skills)

a risk of permanent placement in the group of so-called low-employable, which also means that the public employment services are cautious in presenting such persons with any offers – because of the costs and potentially low effectiveness

NATIONAL POLICY

development by the Ministry of Economy, Labour and Social Policy of the amendments to legislation that will restrict application of deactivating instruments to promote employment instead (obligatory offers for elderly people – of employment or training, before one gains the right to a pre-retirement allowance)

elaboration of the programme of activation for elderly people (50+ programme), which will be financed e.g. from the Labour Fund

identification of the key tasks related to the need of activation for elderly people in the JIM document, i.e. initiation of the works on projects supporting social re-inclusions of elderly people

development of the work methods and encouragement of the activation of elderly people included as a task under Measure 1.1. of SOP HRD

development of the methods of out-placement (with participation of employers but also a possibility of support from the Labour Fund) to sustain employment of employees dismissed for economic reasons, including elderly people, threatened with a greater risk of the permanent loss of employment

EQUAL

under Measure 4.1.3. the support structure are going to be strengthened for elderly people who intend to change their qualifications, extend their skills

preparation of projects opening employers to the needs of the category of elderly people, who should supplement their ICT qualifications and techniques so that they may meet the expectations of a company and employers (also Measure 4.1.3)

4.6. PERSONS WITH DISABILITIES

a large scale of the phenomenon of disability in Poland

too slow a pace of the development of the policy of social and vocational integration of the disabled

barriers to access to the open labour market for the disabled (domination of employment in special market niches – sheltered work establishments, which does not bring about any increase in the scale and is costly)

a low employment rate of the disabled in Poland

a high unemployment of the disabled

a poor dynamics of the improvement of education of the disabled and their access to improving vocational qualifications (a small market offer of this kind)

NATIONAL POLICY

functioning and carrying out of its constitutive tasks by the State Fund for the Rehabilitation of Persons with Disabilities (PFRON)

performance of the special tasks encouraging employment of the disabled on subsidised basis: in the close and in the open labour market

programmes supporting flexible forms of employment of the disabled, also by making use of the modern technologies: „Teleworking”, „Computer for Homer”, „Braille 2000” and sequels, „Junior”, etc.

a special Measure under SOP HRD: Measure 1.4 Vocational and social inclusion of disabled persons; aiming also at the improvement of the education level among the disabled

conditions for the activities of a rich offer of non-governmental organisations for the disabled

recommendations implied by the analysis in the JIM document, enjoining to strengthen quickly the measures for the disabled and to review the effectiveness of the policy in the field

EQUAL

under Measure 4.1.2 aiming at the development of the institution of social economy there shall be created conditions for supporting employment and activation of the disabled people encountering particular problems their in adaptation in the labour market: mentally ill people, mentally handicapped, etc.

among the tasks of Measure 4.1.3 related to the adjustment of enterprises and employees to the changes cause e.g. by new technologies, the educational projects to develop the skills to use the ICT techniques are also targeted at this group of beneficiaries that comprises the disabled

4.7. RESIDENTS OF RURAL AREAS

a large share of agricultural employment in the employment structure in Poland

low profitability of $\frac{3}{4}$ of farms

a large scale of vocational inactivity of the rural area residents

very low qualifications of the rural area residents and their limited access to educational

promotion

low vocational and living mobility that makes it difficult to introduce any changes in the rural areas

the high level of poverty, low incomes, significant percentage of families with many children

a large scale of the danger of social exclusion

hidden unemployment of about 1 million people

the lack of conditions to create new jobs

a particularly bad situation of the residents of the areas of former state-owned farms

the lack of any integrated national policy in the field of restructuring the rural areas and agriculture

NATIONAL POLICY

projects to activate rural areas, also using the funds of the World Bank

governmental projects to activate rural areas and introduce changes in agriculture, combined with the need to adjust the agriculture to the European Joint Agricultural Policy

measures favouring the change of the structure of employment in agriculture and rural areas, and improving the vocational and economic mobility of the rural area residents, included in the Integrated Operational Programme for Regional Development

the stipulated final effects of the SOP Restructuring and Modernising the Food Sector and Developing the Rural Areas

educational activities included in Measure 2.1 and 2.2 of SOP HRD targeted at rural communities

improving educational opportunities of rural area residents (especially of the youth) included in the governmental Strategy of Education Development

in measures of SOP HRD (Measure 1.5.) the presence of themes concentrated on the residents of rural areas

EQUAL

under Measure 4.1.1 concerned with promotion of the labour market open to all, there shall be tasks performed (depending on a model of partnership) that aim at equal opportunities for inclusion in the labour market for the residents of rural areas threatened with exclusion

under Measure 4.1.2 methods to support establishment of institutions of social economy in the rural areas that take account of their specific conditions shall be developed

under Measure 4.1.1 and 4.1.3. the methods shall be strengthened to act for improving the access of the residents of rural areas (young, elder, female and male) to the educational infrastructure for adults, to centres of vocational information, to the labour market, and to the possibility to use and to the abilities to operate the ICT techniques

under Measure 4.1.4 concerning the equal opportunities and reconciliation of vocational roles with family functions of women, one of the specified target groups are women from the rural areas to support their vocational involvement in various types of employment and their individual business activities

4.8. RESIDENTS OF POST-INDUSTRIAL AREAS

high unemployment in the regions of industrial restructuring

adaptation difficulties of the labour resources under the conditions of property and sectoral transformations, or technological restructuring

the lack of adequate stimulation for the people losing work in traditional industrial branches to adjust their qualifications to the new market requirements

the ageing population of the communities of working people and residents of such areas

the lack of adequately strong social agreement and leadership enabling a peaceful transfer of labour resources to new, developing fields

the high costs of restructuring conducted and the high costs of not conducting them

NATIONAL POLICY

restructuring programmes of a governmental character (mining, manufacture of metal products, arms industry, light industry, railways)

supporting the projects of restructuring with the means of the European Union and the World Bank

support from the Labour Fund for some restructuring projects (to place the employees in new work places)

support for re-qualification of the people from post-industrial regions included in the action plans of the Integrated Operational Programme for Regional Development (IOPRD), and partly in the SOP Improvement of the Competitiveness of Enterprises

EQUAL

under Measure 4.1.1 development of the forms of re-inclusion in the labour market of the people and communities losing work in traditional industrial sector branches

under Measure 4.1.3 adjustment of the qualifications of the employees leaving outdated economic branches so that their new skills (including those related to ICT) may help them in find their place in the labour market (similarly, by the way, in Measure 4.1.4)

4.9. ETHNIC MINORITIES AND REPATRIATES

- the lack of a definite national policy on the subject
- initiative projects addressed to national minorities, thus more of a pilot character
- a poor institutional background supporting assimilation of repatriates (in the field of learning the language, vocational education and citizenship awareness)
- limited access to education of the children from the Roma communities, especially in the communities threatened with exclusion

NATIONAL POLICY

- implementation of the „Pilot governmental programme for the Roma community in Małopolskie voivodship for 2001 – 2003” including educational measures; in time the solutions provided in the programme are to be promoted all over Poland
- regulation of the legislative provisions related to the refugee status the law of 13 June 2003 on granting a foreigner protection on the territory of the Republic of Poland (including so-called temporal protection)
- functioning of the Office for Repatriation and Foreigners and the Council for Refugees
- protection of the educational autonomy of the groups of national minorities

- functioning of the establishments for refugees with the assistance programmes to help them in gaining language skills, improving qualifications, enabling to apply for a job
- measures for social and vocational adaptation of the repatriates implemented in agreement with territorial self-governments

EQUAL

- under Measure 4.1.2 in the field of establishing institutions of social economy and of social employment, national minorities and refugees or repatriates are mentioned as one of the target groups (it concerns, certainly, the weakest in vocational and mobility terms)
- the basic tasks are, however, comprised in Measure 4.1.5 „Development of a system of social inclusion for asylum seekers, refugees and repatriates” and they focus on the questions of a deep recognition of the phenomenon (analyses, research, prognoses)
- improvement of the effectiveness of the actions of institutions providing services to refugees and repatriates – as one of the tasks under the implementation of the objectives of Measure 4.1.5
- organisation of training of a linguistic, civil and vocational character – as an element of a potential pilot project under partnerships

The above-presented characterisation of the problems related to discrimination and inequalities in the context of risk groups, set in the priority themes programmed for the EQUAL Initiative – allow to understand the complementary character of measures under EQUAL as compared with other operations carried out in the area of national policy. In this sense the EQUAL programme complies with other projects implemented to counteract social exclusion, discrimination and inequalities.

5. TERMS OF IMPLEMENTATION

For some reasons, beside the process of programming and establishing of cohesion among the measures specified in the EQUAL document and other instruments of national policies that have a bearing on the process of counteracting discrimination and inequalities in the labour market, the terms of implementation of the project become essential:

- the project is being developed and will be implemented in Poland for the first time
- the project concentrates on the goals which in fact only recently have become the subject of a deepened analysis, debate, decision on the need to develop action plans in the field
- the programming of the tasks of the project was initiated under difficult socio-economic conditions, decreased rate of economic development and high unemployment, which obviously limits the possibilities for action
- a fundamental organisational and substantial solution of the project is to set up Development Partnerships, and thus use in maximum the possibilities and results of co-operations between various partners – Poland lacks habits and experience of setting up agreements of the kind (while some of the last editions of the PHARE programme have not been promoted yet)
- it is not clear how co-operation of various institutions of a governmental character (ministries, offices, but also the Labour Fund and the PFRON) and their financial

means might be used in full – especially in the two-year, three-year perspective for provision of the Polish financial contribution to the programme

- in Poland there is no clear, systemic method of the adaptation of results of some programme for future national policies, which is especially important for the EQUAL programme, but which at the same time requires finding innovative solutions
- in general, in the widely understood social policy there is not enough experience to prepare and implement innovative enterprises in such a way that their effects will not be of incidental character, but of as much model value to be promoted and later followed many times.

It seems that to avoid all these dangers while implementing the project and to increase the chances for success of effective implementation, it requires:

- full use of the preparatory time for training potential partners and their participation, as the entities involved in the actions for restricting discrimination and inequalities, in developing also the operational terms of the programme implementation
- a further activity of the team guiding the project, and skilful winning allies to the programme at various levels of the administration, in the Parliament, in the experts' community and among non-governmental organisations and self-governments (which also requires promotion)
- quick decisions on potential financial input of Polish partners, and consideration whether private sector might be involved in the enterprise, or not
- a decision on the form of contracts, types of partnerships (large, „umbrella” projects, or smaller ones – which in which types of measures), as this will allow for quicker operating of the programme and establishment of a list of stipulated results of the project
- a parallel work on Programme Complement, which will allow for working out the details of some tasks under the adopted measures, will also reduce perhaps a list of potential beneficiaries, and will improve selection of those action fields that are probable to bring results in the forms of model, pilot solutions
- a discussion in the Working Group, but maybe in some other partnership bodies, including also the forum of Tripartite Commission, about the mechanism of adaptation of the programme results for national policies
- the development of quick implementation of systemic and institutional solutions essential for the project implementation: legal provisions establishing the institutions of social economy, a new law on employment promotion allowing for re-orientation of the instruments of the labour market policy and expenditure of the Labour Fund means (to enable realisation of the actions specified in the EQUAL programme), provisions related to repatriates, new solutions in the field of labour law that strengthen flexible forms of employment and work organisation.

Thus, one could believe that the implementation of the above recommendation shall improve the implementation of the EQUAL programme – apart from the obvious terms of implementation included in the project in accordance with the recommendations of the European Commission and the model of action on the field of the EQUAL programme.

6. MONITORING FRAMEWORK

In compliance with the rules applied in the EQUAL programme, please find in the following tables the description of the overall indicators required in the process of monitoring the course of the project.

TABLE: OVERALL INDICATORS

OVERALL INDICATORS				
Action	Indicator	Type	Frequency	Source
Action 1				
Input	Funding	Quantitative	Annual	Mon Form
Output	Type of DP (geographical/sectoral)	Qualitative	Annual	Mon Form
	Average amount spent on setting up DP/TC	Quantitative	Annual	Mon Form
	Number of DP/TC set up	Quantitative	Annual	Mon Form
	Average number of partners in DP/TC	Quantitative	Annual	Mon Form
Action 2	Funding	Quantitative	Annual	Mon Form
	Number of beneficiaries	Quantitative	Annual	Mon Form
	% of DPs attempting to measure soft outcomes	Quantitative	Annual	Mon Form/Supp vis
	% of DPs promoting flexible working arrangements within beneficiary companies	Quantitative	Annual	Mon Form/Supp vis
	% of DPs successfully empowering beneficiaries in implementing activities	Qualitative	Mid-term	Eval/Supp vis
	% of DPs promoting childcare/dependent care facilities (depending on realised area of activities)	Quantitative	Annual	Mon Form/Supp vis
	% of those receiving support, % who are unemployed (depending on realised area of activities)	Quantitative	Annual	Mon Form
	% of DPs supporting forms in the Social Economy (depending on realised area of activities)	Qualitative	Mid-term	Eval/Supp vis
	% of women receiving support	Quantitative	Annual	Mon Form
	% of those receiving support, % which are employed (depending on realised area of activities)	Quantitative	Annual	Mon Form
	% of beneficiaries receiving basic skills help (depending on realised area of activities)	Quantitative	Annual	Mon Form
	% of beneficiaries participating in lifelong learning (depending on realised area of activities)	Quantitative	Annual	Mon Form
	% of projects promoting the use of ICT (depending on realised area of activities)	Quantitative	Annual	Mon Form

	% of women trained in non traditional occupations (depending on realised area of activities)	Qualitative	Mid Term	Evaluation
	% of asylum seekers receiving support	Quantitative	Annual	Mon Form
	% of SME in all companies receiving support,	Quantitative	Annual	Mon Form
	Average number of transnational meetings attended per DP	Quantitative	Annual	Mon Form
	% of DPs undertaking the following with transnational partners: <ul style="list-style-type: none"> • exchange of information and experience; • parallel development of innovative approaches; • import, export or adoption of new approaches and their adaptation to own situation; • joint development – division of tasks with a common objective; • exchange of trainees/trainers/staff 	Qualitative	Annual	Mon Form/Supp vis/Eval
	% of DPs undertaking: <ul style="list-style-type: none"> • process-orientated innovation; • goal-orientated innovation; • context-orientated innovation 	Qualitative	Annual	Mon Form/Supp vis/Eval
Action 3	Funding	Quantitative	Annual	Mon Form
	Average number of National events attended per DP	Quantitative	Annual	Mon Form
	Average number of European events attended per DP	Quantitative	Annual	Mon Form

7. EVALUATION OF THE STIPULATED RESULTS

The version of the document that was subject to this analysis and ex ante evaluation was not yet covering the part concerned with the description of the evaluation of the stipulated results of the project implementation. This is understandable and acceptable, on the condition that the part will be supplemented in the following stages of works on the project and included in the document. It also seems that it might have been an important component of the Programme Complement. However, I would like to express under these circumstances very precise expectations and suggestions related to the formulation of stipulated results, as well as their criteria.

The success of the implementation of the EQUAL programme depends on:

- efficient setting-up of various types of partnerships in various regions of the state and of various compositions – and also in proper time
- a good quality of projects, which obviously should be properly managed

- achieving under each measure and in every partnership appropriate quantitative results involving the participants in the offered enterprises that bring them actual support (effects of training, finding jobs, the number of newly established institutions of social economy, the amount of counselling, the number of participants by gender of the undertaken measures, etc.)
- the popularisation, thanks to the realisation of the EQUAL programme, of the principle of co-operation of partners undertaking in accordance to similar rules new, innovative tasks
- the possibility to translate the parameters identified thanks to the implementation of EQUAL into a general improvement of the situation of given groups of beneficiaries in their environments in terms of a better position in the labour market and of reduction of discrimination and inequalities
- generating under various projects innovative models of action, effectively applied – disseminating in the environment of the implemented Development Partnership, and becoming a good example worth wide popularisation
- a skilful adaptation of the programme results (a model of procedure in various matters) for national policies in future, which requires to work out the mechanism of the adaptation in such a way that the proposals effectively reach political decision-makers and their environments
- a skilful use of the effects of transnational exchange, so that they serve not only the environment of the given partnerships, but also become accessible to all the programme participants all over the country, and inspire new actions; and also that the transnational contacts get strengthened and bring profits to the interested parties also after the conclusion of the programme
- on achieving improvement in the social climate in the questions related to discrimination and inequalities, which by the way might be searched in public surveys before the beginning of the programme and after its implementation.

As it might be seen in the presented list of expectations and conditions of a kind for success and effectiveness of the impact of the EQUAL programme – its actual stronger and deeper effects should rather take place in the field of qualitative issues, new models of action in the social policy, not in simple quantitative criteria.

It might be worth perhaps presenting in Chapter 4. 2 such a list of overall conditions for the impact of project implementation, and moving the figures to the Programme Complement.

8. GENERAL RECOMMENDATIONS

Implementation of the EQUAL programme is of an extreme importance for re-orientation of some actions under the social policy to increase effectiveness of the instruments applied. Pilot solutions, which thanks to the programme will be implemented and promoted, might in future become constant elements of the policy to reduce discrimination and inequalities in the labour market. Finally, the model of action based on the formula of partnership is unusually important for the dissemination of the method of agreement and establishment of local or regional coalition – as a way of support for undertaking difficult challenges of the labour market, and with positive effects. Also of great importance is the possibility to exchange information and experiences in the field with other partners from different countries.

On the basis of the presented ex ante evaluation some general recommendations might be inferred:

- as quickly as possible one should prepare in accordance with the recommendations included in the „Evaluation.” a complete description of the indicators as well as the evaluation of the programme impact
- one should select the modes of setting up the partnerships, even if they are heterogeneous – single, of a small scale, and „umbrella”, of a larger scale with various sub-projects
- one should continue the intensive training process that is at the same time a process of engagement in the preparatory procedure, and next in the project implementation, of organisations showing experience in the actions counteracting discrimination and inequalities (it would be worth doing to engage in this process more intensively the organisations of employers, trade unions and self-governments)
- one should intensify the co-operation within governmental structures in order to explain the mechanism of providing the Polish contribution to the project
- one should work out and discuss the rules and mechanisms of adaptation of the programme results for national policies in future, which already today requires co-operation with various institutions taking decisions and with decision-makers
- one should prepare in the Programme Complement a more detailed model of action under particular priority themes so that potential project providers might equally know of which palette of offers they may choose (in compliance with the principle of innovation and the right to innovation)
- one should see to the implementation as quickly as possible of the legal and organisational solutions necessary for creation of the conditions for some measures (changes in the Labour Code, the legislation providing for a wider scope of the functioning of the institutions of social economy)

I am convinced that one of the conditions guarantying successful implementation of the Programme is the quality of the team supervising the programming and implementation process, the team situated in the Department for European Social Fund Management in the Ministry of Economy, Labour and Social Policy.

September, 2003

Phd Michał Boni

Annex 5 STATISTICAL TABLES

Table 1. Basic labour market indicators

Specification	IV qtr 1992	IV qtr 1993	IV qtr 1994	IV qtr 1995	IV qtr 1996	IV qtr 1997	IV qtr 1998	IV qtr 1999*	IV qtr 2000	IV qtr 2001	IV qtr 2002
Indicator of vocational activeness (in %)											
15-64	69,5	69,0	67,7	66,9	66,4	65,9	65,8	65,5	65,3	64,9	64,1
Rate of employment (in %)											
15-64	59,8	58,4	58,0	57,9	58,6	59,0	58,6	56,6	54,7	52,7	51,2
15-24	32,8	30,4	28,9	28,3	29,7	30,6	29,6	27,5	25,4	22,5	20,4
25-54	74,8	73,7	74,2	74,4	75,0	75,2	75,0	72,9	70,9	68,7	62,5
55-64	34,0	33,7	32,4	31,6	31,2	31,2	30,7	28,8	26,8	27,0	26,4
Rate of unemployment (in %)											
15-64	14,0	15,4	14,2	13,4	11,8	10,4	10,8	13,6	16,2	18,8	20,1
15-24	29,0	31,6	31,7	30,9	26,2	23,2	23,3	28,7	34,1	41,1	43,6
25-54	12,1	13,4	12,0	11,1	9,9	8,7	9,1	11,4	13,6	15,8	17,1
55-64	7,1	7,3	6,2	6,0	5,5	5,0	6,3	8,1	10,1	8,8	9,8
Rate of youth unemployment (the unemployed of age 15 – 24 compared with population 15-24)	13,5	14,1	13,4	12,6	10,5	9,3	9,0	13,2	13,1	15,7	15,8
Rate of long-term unemployment	5,4	5,3	5,8	5,2	4,6	3,5	3,8	4,8	6,6	8,4	10,1
Share of the long-term unemployed	39,6	35,8	41,6	39,9	40,4	34,1	35,4	31,7	41,1	45,4	50,4
Share of the self-employed compared with total employed	24,4	26,1	25,8	23,9	23,7	23,5	22,6	22,8	23,0	23,6	22,5
The employed of age 15 and more according to the level of education** (in %)											
High	10,2	10,5	11,1	11,4	11,6	12,0	13,0	13,4	14,1	15,6	17,1
Average	64,1	64,7	66,4	67,4	68,3	69,5	70,2	71,5	71,0	70,5	69,7
Low	25,7	24,8	22,5	21,2	20,2	18,5	16,9	15,0	14,8	13,9	13,2
The unemployed of age 15 and more according to the level of education** (in %)											
High	3,6	3,1	2,6	2,4	2,7	2,2	3,4	3,7	3,7	4,7	5,6
Average	72,8	71,9	74,7	74,1	74,4	74,6	72,9	76,5	76,5	77,4	76,1
Low	23,5	25,0	22,8	23,5	22,9	23,3	23,8	19,8	19,8	17,9	18,3

MALES

Specification	IV qtr 1992	IV qtr 1993	IV qtr 1994	IV qtr 1995	IV qtr 1996	IV qtr 1997	IV qtr 1998	IV qtr 1999*	IV qtr 2000	IV qtr 2001	IV qtr 2002
Indicator of vocational activeness (in %)											
15-64	76,4	75,9	74,0	73,6	73,0	72,6	72,1	71,9	71,7	71,0	70,3
Rate of employment (in %)											
15-64	66,7	65,3	64,7	64,5	65,6	66,1	65,3	63,3	61,4	58,5	56,7
15-24	36,8	34,5	32,7	32,6	34,2	34,9	33,2	30,9	28,7	24,7	22,5
25-54	81,8	80,5	80,7	80,9	82,0	82,4	81,9	80,0	78,1	75,0	67,5
55-64	42,5	43,3	41,6	40,4	40,3	40,7	40,0	37,4	34,8	35,6	34,3
Rate of unemployment (in %)											
15-64	12,6	14,0	12,6	12,4	10,1	8,9	9,5	11,9	14,4	17,7	19,3
15-24	27,2	29,4	29,3	28,7	23,4	20,5	21,3	26,8	32,1	40,0	43,7
25-54	10,5	12,0	10,4	10,0	8,2	7,1	7,7	9,7	11,7	14,6	16,1
55-64	7,9	7,4	6,0	6,7	5,7	5,1	6,7	8,2	9,9	8,8	9,9
Rate of youth unemployment (the unemployed of age 15 – 24 compared with population 15-24)	13,7	14,4	13,5	13,1	10,5	9,0	9,1	12,4	13,6	16,6	17,5
Rate of long-term unemployment	4,7	4,5	4,5	4,3	3,7	2,6	2,7	3,8	5,1	7,3	9,2
Share of the long-term unemployed	37,7	32,7	36,6	35,6	37,3	29,8	29,5	29,2	36,1	42,5	47,2
Share of the self-employed compared with total employed	26,8	28,7	28,9	27,3	26,5	26,5	26,0	26,8	26,5	26,9	25,9
The employed of age 15 and more according to the level of education** (in %)											
High	9,7	10,1	10,5	10,8	10,8	10,8	11,3	11,4	11,8	13,5	14,2
Average	65,8	66,1	67,6	68,3	69,6	70,7	71,9	73,4	73,0	72,4	72,2
Low	24,5	23,8	21,9	20,9	19,7	18,5	16,9	15,2	15,1	14,2	13,6
The unemployed of age 15 and more according to the level of education** (in %)											
High	4,0	3,5	3,1	2,4	2,5	1,9	2,8	3,3	3,2	3,5	4,1
Average	70,9	69,4	72,1	71,9	71,8	71,3	71,8	73,7	74,7	76,6	75,8
Low	25,2	27,0	24,8	25,6	25,7	26,8	25,4	23,0	22,2	19,9	20,1

FEMALES

Specification	IV qtr 1992	IV qtr 1993	IV qtr 1994	IV qtr 1995	IV qtr 1996	IV qtr 1997	IV qtr 1998	IV qtr 1999*	IV qtr 2000	IV qtr 2001	IV qtr 2002
Indicator of vocational activeness (in %)											
15-64	59,9	59,6	58,8	58,1	57,4	56,9	57,3	58,2	59,1	58,8	58,0
Rate of employment (in %)											
15-64	50,6	49,5	49,3	49,6	49,5	49,9	50,1	49,2	48,2	46,9	45,9
15-24	34,2	31,4	30,3	29,8	31,5	32,9	32,7	26,7	22,1	20,2	18,4
25-54	48,3	59,4	59,7	60,1	59,6	59,7	60,0	61,8	63,7	62,4	57,7
55-64	26,6	25,6	24,5	24,0	23,3	23,1	22,8	21,3	19,8	19,6	19,6
Rate of unemployment (in %)											
15-64	15,6	17,0	16,1	14,7	13,8	12,3	12,5	15,4	18,4	20,3	20,9
15-24	31,1	34,2	34,8	33,7	29,5	26,5	25,5	31,0	36,4	41,8	42,7
25-54	13,9	15,0	13,7	12,4	11,8	10,5	10,8	13,4	15,9	17,5	18,2
55-64	5,9	7,2	6,5	5,1	4,9	4,6	5,6	7,9	10,4	8,7	9,7
Rate of youth unemployment (the unemployed of age 15 – 24 compared with population 15-24)	13,0	13,7	13,3	12,2	10,6	9,5	8,8	13,9	12,7	14,8	13,8
Rate of long-term unemployment	6,3	6,4	7,3	6,4	5,8	4,5	5,0	6,0	8,3	9,6	11,3
Share of the long-term unemployed	41,5	38,7	46,3	44,2	43,0	37,9	40,7	32,9	45,8	48,3	54,0
Share of the self-employed compared with total employed	21,5	23,0	22,0	19,8	20,2	19,8	18,5	18,0	18,6	19,5	18,4
The employed of age 15 and more according to the level of education** (in %)											
High	10,8	11,0	11,9	12,2	12,5	13,4	15,0	15,9	17,0	18,3	20,6
Average	62,2	62,9	64,9	66,3	66,6	68,0	68,1	69,3	68,6	68,1	66,6
Low	27,1	26,1	23,2	21,6	20,8	18,6	16,9	14,8	14,5	13,6	12,8
The unemployed of age 15 and more according to the level of education** (in %)											
High	3,3	2,7	2,1	2,3	2,8	2,4	3,9	4,1	4,2	6,0	9,5
Average	74,7	74,2	77,0	76,2	76,6	77,4	73,8	78,8	78,2	78,2	68,1
Low	21,9	23,0	21,0	21,4	20,6	20,2	22,4	17,1	17,6	15,8	22,4

* Data from 1999 due to interruption of research does not come from LFS

** Levels of education: high – university, average – post-secondary, vocational secondary, general secondary, basic vocational, low – primary and incomplete primary

Source: LFS

Table 2. Basic efficiency measures for professional mobilisation measures, which were implemented by labour offices between years 1999 – 2002

Measures	Year 1999		Year 2000		Year 2001		Year 2002	
	Number of persons	Rate of renewed employment	Number of persons	Rate of renewed employment	Number of persons	Rate of renewed employment	Number of persons	Rate of renewed employment
TOTAL	556,500	51.2	452,072	49.8	234,759	48.6	253,096	48.5
Training	146,037	50.6	108,711	49.1	51,176	44.5	51,742	44.6
Subsidized jobs	174,669	65.1	132,930	66.4	64,846	67.8	58,314	68.0
Public works	77,881	13.2	56,328	14.2	32,874	13.3	34,368	17.9
Reimbursement of social insurance (ZUS contributions)	2,400	-	1,384	77.8	1,086	89.4	x	x
Graduates' reimbursements	68,271	73.3	53,974	71.7	26,362	73.5	27,213	76.4
Apprenticeships	64,697	39.5	72,862	36.3	45,867	35.2	66,708	41.0
Community work	1,046	19.4	931	26.2	632	44.6	x	x
Special programs	9,880	25.2	11,593	60.2	4,972	62.4	4,413	70.3
Loans – total	11,598	-	7,338	-	3,737	-	3,495	
Loans for the unemployed	9,055		5,507		2,955		2,677	
Loans for employers	2,543		1,831		782		818	
Other tasks	-	-	6,021	43.3	3,207	30.5	6,843	x

Source: MELSP

Table 3. Percentage of persons within individual households threatened by poverty according to place of residence, social and economic group and type of biological family in 2002

Specification	Poverty line		
	Relative	defined by law	minimum subsistence
	% of the population		
Total	18,4	18,5	11,1
Urban area	12,2	12,2	7
Rural area	27,9	27,9	17,4
Social and economic groups			
Employees	14,8	14,8	8,5
Employees having individual farms	25,8	25,6	14,2
Farmers	27,7	27,9	16,7
Self-employed	9	9,2	4,5
Pensioners	16,3	16,4	9,9
People with other source of income	10,6	10,8	5,9
Biological type of family			
Married couple without children	4,6	6,5	2,5

Married couple with 1 child	4,4	4,3	2,3
Married couple with 2 children	8,5	8,7	4,6
Married couple with 3 children	15,8	15,8	8,6
Married couple with 4 and more children	28,9	28,8	17,4
Single parent with dependant children	50,7	49,8	37,1

Source: Central Statistical Office

Table 4. People covered with special programmes

Categories of participants	Number of participants			Change in number of participants (2002/2001, in %)
	as of 31.12.2000	as of 31.12.2001	as of 31.12.2002	
Participants total	11,503	3,656	4,093	12.0
Percentage of the unemployed (registered) covered with special programmes	0.43	0.12	0.12	0.0
Percentage share of separate groups in relation to participants total (in %)				
Females	46.9	51.3	35.4	-15.9
Staying unemployed for:				
up to 1 month	10.3	11.4	15.2	3.8
from 1 to 12 months	38.5	32.1	34.8	2.7
from 12 to 24 months	33.1	33.9	29.4	-4.5
from 24 to 36 months	9.7	12.3	11.8	-0.5
more then 36 months	5.7	8.1	6.7	-1.4
Other categories:				
Unskilled workers	21.1	19.0	17.3	-1.7
Youth up to 24 years old	16.8	22.9	28.5	5.6
Graduates	3.5	6.2	17.5	11.3
People leaving penitentiaries	0.6	0.2	1.2	1.0
Inhabitants of rural areas	44.5	50.2	46.5	-3.7
Former workers of state farms	4.0	3.8	13.6	9.8
People leaving health sector	5.2	6.8	3.3	-3.5
Dissolution of public offices	0.2	0.4	0.0	-0.4
Arms industry	13.4	3.7	0.8	-2.9
Restructuring of mining sector	0.3	0.2	0.1	-0.1
Restructuring of steel industry	1.7	0.0	0.0	0.0
Other	10.9	5.7	4.9	-0.8

Source: MELSP

Table 5. Indicators of differences in social and economic regional development in Poland

Voivodship	Rate of employment*			Rate of unemployment*			The long-term unemployed registered in labour offices (12-24 months)**	The long-term unemployed registered in labour offices (more than 24 months)**	GDP per capita***		Percentage of employed in services in relation to employment total****
	Total	Males	Females	Total	Males	Females	(% of the total unemployed in the region)	(% of the total unemployed in the region)	In thous. PLN	In relation to national average	
POLAND TOTAL	44,1%	50,7%	38,1%	19,7%	19,0%	20,6%	20,4%	30,8%	18,4	100,0%	44,7%
Dolnośląskie	39,8%	45,7%	34,2%	27,2%	26,4%	28,1%	20,4%	27,5%	19,2	104,3%	52,4%
Kujawsko-pomorskie	43,6%	51,5%	36,3%	21,6%	20,0%	23,7%	19,0%	32,8%	16,5	89,7%	44,2%
Lubelskie	48,6%	55,0%	42,9%	16,6%	16,4%	16,8%	20,8%	33,3%	12,8	69,6%	32,9%
Lubuskie	39,5%	44,4%	35,0%	25,9%	27,6%	23,7%	19,9%	26,8%	16,7	90,8%	52,7%
Łódzkie	45,0%	50,7%	39,8%	19,5%	20,4%	18,5%	20,7%	33,4%	16,7	90,8%	40,6%
Małopolskie	46,8%	52,8%	41,6%	16,1%	16,1%	16,1%	20,0%	29,3%	16,5	89,7%	41,3%
Mazowieckie	49,0%	55,6%	43,1%	16,9%	15,7%	18,2%	21,6%	33,2%	27,4	148,9%	51,4%
Opolskie	42,5%	49,9%	36,0%	17,5%	15,2%	20,1%	19,1%	29,6%	15,6	84,8%	42,5%
Podkarpackie	46,0%	52,6%	39,8%	18,4%	17,8%	18,8%	18,1%	37,0%	13,1	71,2%	32,0%
Podlaskie	46,4%	53,3%	40,0%	17,7%	17,5%	17,9%	18,8%	33,0%	13,7	74,5%	36,7%
Pomorskie	42,5%	50,7%	35,1%	21,9%	20,4%	23,6%	21,8%	28,4%	18,6	101,1%	54,0%
Śląskie	40,3%	47,2%	34,2%	18,8%	17,5%	20,3%	20,6%	27,0%	20,4	110,9%	48,0%
Świętokrzyskie	40,9%	45,4%	36,6%	18,7%	19,0%	18,7%	19,7%	34,4%	14,3	77,7%	31,7%
Warmińsko-mazurskie	40,6%	46,1%	35,3%	24,8%	23,0%	26,8%	19,7%	34,6%	13,9	75,5%	47,8%
Wielkopolskie	46,3%	55,2%	37,9%	18,2%	16,0%	21,1%	21,2%	26,7%	19,6	106,5%	43,7%
Zachodniopomorskie	39,1%	44,9%	34,0%	25,9%	25,9%	25,9%	20,9%	28,8%	18,6	101,1%	55,8%

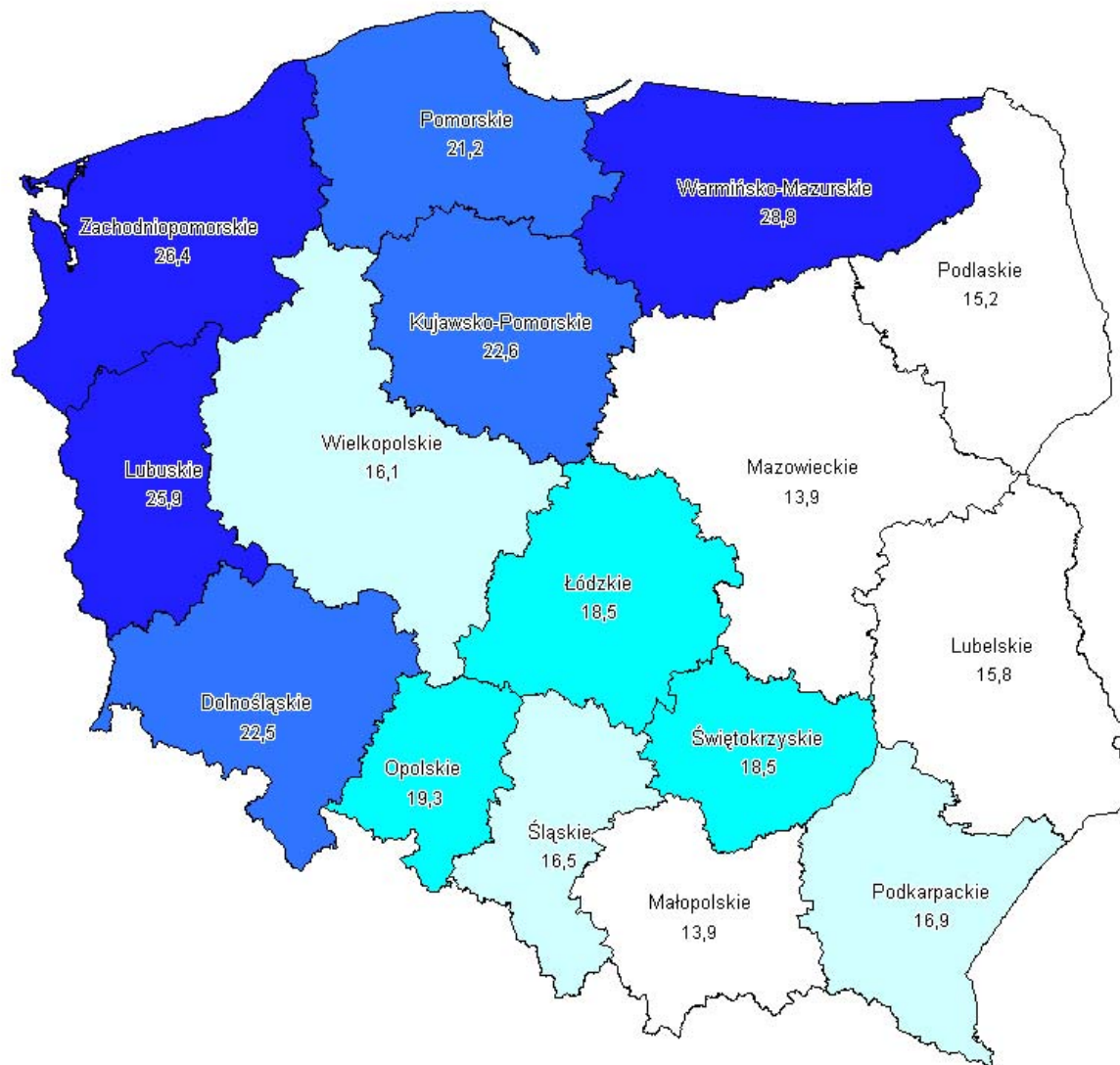
* data from IVth quarter of 2002 (LFS)

** end of 2002

*** data from 2000

**** data from 1999

Source: Central Statistical Office



MAP 1. Unemployment rate as for December 2002
 (in parentheses number of voivodships)

Source: Central Statistical Office