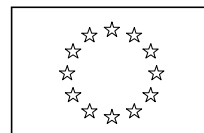




REPUBLIC OF SLOVENIA
MINISTRY OF LABOUR,
FAMILY AND SOCIAL AFFAIRS



**COMMUNITY INITIATIVE
PROGRAMME**

EQUAL

2004-2006

FOR SLOVENIA

March 2004

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ABBREVIATIONS

ALMP	Active Labour Market Policy Programmes
CIP	Community Initiative Programme
DP	Development Partnership
DPA	Development Partnership Agreement
EQUAL CIP MA	Managing Authority for the EQUAL CIP
EAGGF	European Agriculture Guidance and Guarantee Fund
EC	European Commission
ECDB	EQUAL Common Database
EES	European Employment Strategy
ERDF	European Regional Development Fund
ERF	European Refugee Fund
ESF	European Social Fund
ESS	Employment Service of Slovenia
EU	European Union
FDI	Foreign Direct Investment
FIFG	Financial Instrument for Fisheries Guidance
GDP	Gross Domestic Product
GOSP	Government Office of Structural Policy and Regional Development
HRD	Human Resource Development
ICT	Information & Communication Technologies
ICMPD	International Centre for Migration Policy Development
ILO	International Labour Organisation
IOM	International Organisation for Migrations
JAP	Joint Assessment Paper
JIM	Joint Inclusion Memorandum
LFS	Labour Force Survey
MA	Managing Authority
MoE	Ministry of the Economy
MoESS	Ministry of Education, Science and Sport
MoF	Ministry of Finance
MoI	Ministry of Interior
MoLFSA	Ministry of Labour, Family and Social Affairs
NDP	National Development Plan

NGO	Non-Governmental Organisation
NSS	National Support Structure
PA	Paying Authority
PFoR	Policy Frame of Reference
SECI	Southeast European Cooperation Initiative
SME	Small and medium-sized enterprises
SNA	Systems Network Architecture
SORS	Statistical Office of the Republic of Slovenia
SP SEE	Stability Pact for South Eastern Europe
SPD	Single Programming Document
TA	Technical Assistance
TCA	Transnational Co-operation Agreement
UNDP	United Nations Development Programme
UNHCR	United Nations' High Commissariat for Refugees

1 INTRODUCTION AND BRIEF SUMMARY

This document is the Community Initiative Programme (CIP) to deliver EQUAL in Slovenia. Funded through the European Social Fund (ESF), EQUAL will test and promote new means of combating all forms of discrimination and inequalities in the labour market in Slovenia, both for those in work and for those seeking work, through transnational co-operation. EQUAL will also include activities to help the social and vocational integration of asylum seekers. It will also form part of the integrated European Community strategy to combat discrimination (in particular that based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation) and social exclusion.

EQUAL operates in nine themes, defined in the context of the European Employment Strategy (EES) and Social Inclusion Process. The themes support the overarching objectives of full employment, quality and productivity at work, cohesion and an inclusive labour market. 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 a specific disadvantaged group. The themes are:

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
2. Combating racism and xenophobia in relation to the labour market
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
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
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
6. Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies
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
8. Reducing gender gaps and supporting job desegregation
9. Supporting the social and vocational integration of asylum seekers.

Slovenia defined the thematic fields and appropriate activities in a programme according to labour market needs, policy priorities and results of consultation with partners. A mainstreaming approach is adopted in each thematic field. Bearing in mind the amount of financial contribution Slovenia will receive for its EQUAL programme and the short programming period, the Slovenian CIP is limited on realisation of co-financed actions for four themes (1, 5, 8 and 9), so that the concentration of actions, activities and efforts will be guaranteed and quality development partnerships will be developed.

EQUAL will operate by bringing together the key players in a geographical area or sector into Development Partnerships (DPs). The different worlds of public administration, nongovernmental organisations, social partners and the business sector (in particular SMEs) will work in partnership, pooling their different types of expertise and experience. DPs will choose one of the themes and agree a strategy within which they will try out new ways of dealing with problems of discrimination and inequality that they have already pinpointed.

Central to the work of each DP will be its links with at least one partnership from another Member State and possibly additional associated partners from TACIS, MEDA, PHARE or CARDS countries as appropriate and its involvement in a network of others dealing with the same theme within Slovenia as well as across Europe. The new ideas will be tested with a view to using the results to influence the design of future policy and practice. DPs will also participate in the dissemination and mainstreaming of good practice.

Development Partnerships will be selected for EQUAL funding following a national call for proposals. A common approach to selection of Development Partnerships will be agreed with the Slovenia Programme Monitoring Committee.

EQUAL will fund activity under the following four actions within each theme:

- Setting up Development Partnerships and transnational co-operation (Action 1)
- Implementing the work programmes of the Development Partnerships (Action 2)
- Thematic networking, dissemination of good practice and making an impact on national policy (Action 3) and
- Technical Assistance to support actions 1, 2 and 3 - 8% of the budget.

Actions 1 and 2 are sequential. Action 3 is expected to start either at the earliest point that results of Slovene DPs are available to disseminate, or can run in parallel to the other actions. Slovene DPs (acting either singly or in groups), or ad hoc consortia of Development Partnership partners, multipliers and experts can be selected to carry out activities for assessing, presenting and promoting the evidence for good practice at national or European level, e.g. working with good practice from the 1st round of EQUAL. Technical Assistance will provide support from before the commencement of Action 1.

The ESF allocation for Slovenian programme is 6.442268 million euro for the 3-year period 2004-2006. This contribution from ESF will be matched by national public funding (2.147423 million euro). The total allocation for the CIP thus amounts to 8.589691 million euro. The financial distribution will be as follows:

- Theme 1: 60%
- Theme 5: 15%
- Theme 8: 15%
- Theme 9: 2%
- Technical Assistance: 8%

- This CIP forms a part of the formal Commission decision on the contribution to the Programme in each Member State and represents the basis for the implementation of Community Initiative EQUAL supported activities in Slovenia for the period 2004-2006. The CIP includes the outline of measures, which Slovenia will implement during this programming period. The description of the measures is further developed and specified in the Programme Complement (PC), especially in terms of intervention description, implementation that includes information about financial allocations per themes, setting up of Development Partnerships, transnational co-operation, eligible activities and expenditures, managing arrangements and financial justification and reimbursement system.
- PC further concentrates on general information regarding DPs application and selection process with detailed description of selection criteria, monitoring systems with special mention of main indicators and the description of the data collection system of transmission to the Commission. Apart from that also information on monitoring and control of activities and information and publicity strategy is provided in PC. Special attachments to PC are the financial tables at measure level.

1.1 An account of the process of programming

The CIP was drafted by the Department for Labour Market, Employment and Education, Sector for ESF within the Ministry of Labour, Family and Social Affairs (MoLFSA) as the Managing Authority for the EQUAL CIP (EQUAL CIP MA). Prior to the actual start of programming process MoLFSA established a Working Group on EQUAL with seven members, all from Sector for ESF, and chaired by State Secretary of MoLFSA responsible for Labour Market, Employment and Education. Later on EQUAL CIP MA established a Programming Group, including representatives from MoLFSA, Ministry of Education, Science and Sport (MoESS), Ministry of Economy (MoE), Ministry of Finance (MoF), Ministry of Interior (MoI), Governmental Office for Structural Policy and Regional Development (GOSP) and Governmental Office for Equal Opportunities, which co-operated in preparation of the programme.

In the preparation of this CIP, the Working and Programming Group used following documents and data as the main influences on the design of the strategy for implementation of EQUAL in Slovenia:

- European Employment Strategy (2003)
- Strategy of Economic Development of Slovenia (2001)
- National Development Plan (2001)
- Single Programming Document 2004-2006
- National Programme of Development of the Labour Market and Employment up to 2006
- National Programme on the Fight Against Poverty and Social Exclusion and Report on Realisation of the Programme
- Joint Assessment of the Employment Policy Priorities of Slovenia (JAP)
- Joint Inclusion Memorandum (JIM)
- Ex-ante evaluation of the EQUAL Community Initiative Programme (Annex C)

CIP is based upon European Employment Strategy and Joint Inclusion Process and the Strategy of Economic Development of Slovenia, endorsed in July 2001, whose main goal is to increase the prosperity of people living in Slovenia in a sustainable manner. In December 2001, Slovenia elaborated its strategic goals in the National Development Plan (NDP) through actual programmes, measures and projects, together with the necessary financial resources. The NDP therefore represented the skeleton for the choices Slovenia had to take in deciding which actions it wants to support through the European structural policy actions. It is also in this way that complementarity with other national policies will be assured.

1.1.1 EQUAL Programming Rationale

Since unemployment is one of the main causes of poverty and social exclusion, promoting access to employment is recognised as a key way out of poverty and social exclusion. Despite decreasing unemployment in Slovenia, the structural problems remain. The challenge is thus to reduce the structural imbalances, primarily by paying more attention through active employment policy measures to the long-term, unskilled, young (especially women), elderly and Roma unemployed.

Further action should therefore be redirected from what are termed passive forms (benefits) of help to active forms, primarily to those that remove the causes of unemployment, including most importantly a low educational level and inadequate vocational skills, and associated problems in finding employment. In other words, the policy must bring people who depend on benefits back to work as well as creating more and better jobs.

As exclusion of persons with disability from the labour market is increasing, special attention will need to be devoted to equalising opportunities and increasing independence for people with special needs. Furthermore, employment opportunities have also to be ensured for the most vulnerable groups, who are confronted with an accumulation of problems of social exclusion and who are therefore furthest from the labour market (such as people with disabilities, women, young people, older workers, ethnic groups (Roma), ex-prisoners, drugs and alcohol abusers and those discriminated on the basis of their sex orientation, etc.).

The education structure of the adult population is improving, but the proportion of persons with completed tertiary education is still relatively low, and the inclusion of older persons in education and training and the level of functional literacy are still unsatisfactory. Besides unemployment, poor education is the main determinant of poverty and social exclusion. Because of this, increased investment in education remains a key long-term policy to prevent poverty and social exclusion.

Special attention should be devoted to developing and extending the lifelong learning culture. Inclusion of the young in education is increasing, while the dropout rate is still relatively high, mainly in lower vocational education. Since every person dropping out from the education process before acquiring an appropriate qualification reduces their prospects of finding employment, reducing (preventing young people from dropping out of school and bringing

them back into learning) the dropout rate from secondary schools is still one of the key strategies in the fight against social exclusion.

In addition, in recent years a disparity in the use of the Internet between Slovenia and the EU has appeared, so Slovenia must do more to stimulate progress in ICT use. In this way, risks connected with the digital gap would be reduced.

EQUAL should provide added value and be complementary to, in particular, employment and human resources development activities delivered under the Priority 2 of the Single Programme Document 2004-2006 (Knowledge, human resource development and employment), and provide for close complementarities with other Community Initiatives, especially INTERREG, Programme LEONARDO and European Refugee Fund. In that regard, the Development Partnerships (DPs) should engage in actions and activities for which funding is not already provided for under the SPD in order to maximise the efficient allocation of public resources and to avoid duplication or overlapping.

1.1.2 The Consultation Process

The consultation process has formed an integral part in the preparation of the CIP and in determining the priority themes which shall be addressed under EQUAL in Slovenia. The process started in September 2002 with presentations of the EQUAL Community Initiative to the interested stakeholders, continued during 2003, and is still ongoing.

According to the EQUAL principle of “empowerment” a lot of stakeholders have been included already in the programme design. The EQUAL CIP MA included in the programming process parties from different levels, internal stakeholders (other ministries and governmental offices), on one side, and external stakeholders (social partners, non-governmental organisations, non-profit organisations, individuals, etc.), on the other. Before addressing the civil society and general public, an ongoing consultation process was established with other departments of the state administration and an inter-ministerial process of cooperation and consultation was implemented through the Programming Group.

First, the MA consulted the Department for Social Affairs of MoLFSA, which prepared the Joint Inclusion Memorandum (JIM) and for which the Faculty for Social Sciences carried out a study entitled “Social and Economic Inclusion of Deprived Groups: Possible Measures to Increase the Employability of Most Vulnerable Categories of Long-term Unemployed and Inactive Persons”.

The MA also consulted other ministries and governmental offices, which could be involved also in the further preparation of programme and its implementation. Among them were the Ministry Education, Science and Sport, the Ministry of Internal Affairs, the Governmental Office for Equal Opportunities and the Governmental Office for Structural Policy and Regional Development. Apart from data provided as an input to the labour market analysis, they also gave some valuable advices and ideas concerning the programming of EQUAL.

This ongoing cooperation will continue until the adoption of the CIP as well as during the program implementation in the form of the future Monitoring Committee.

The MoLFSA presented the basic information on EQUAL Programme to the general public at different opportunities. MoLFSA organised a Forum on EQUAL Community Initiative to which the representatives of the most of interested social partners, civil society groups, non-governmental organisations and other relevant institutions and organisations from Slovenia were invited. More than 40 people, representing those who face discrimination and inequality on the labour market, attended the forum and showed great interest in the initiative. Afterwards some of them presented their suggestions or posed questions, which were answered on the Internet page of the MoLFSA (<http://www.gov.si/mddsz/zaposlovanje/equal.htm>). Furthermore, some organisations sent suggestions and ideas about possible development partnerships. The MoLFSA took them into account in the preparation of this CIP. Finally, during the period from September 2002 till March 2004 the EQUAL Initiative was presented on several other occasions.¹

Apart from this, ad hoc consultations and cooperation with the non-governmental sector have been carried out. The purpose of such collaboration has been to stimulate the non-governmental sector to participate more actively in the preparation of strategic documents and policies.

Therefore, the consultation process has been primarily based on written responses and suggestions to the documents published on the MoLFSA's Internet page, on a number of formal and informal meetings of the Programming Group, meetings with interested parties on request or on an ad hoc basis. The primary priorities identified were under the theme of "Facilitating access and return to the labour market" for disadvantaged groups, with equal opportunities and social inclusion as key crosscutting issues. The discussions held during this process, questions received and suggestions from the partners, ranged from those related to the choice of activities, identification of disadvantaged groups, and funds available to development partnerships, to the provisions for the implementation of EQUAL-supported activities in Slovenia. Within this context, suggestions for upgrading the existing programmes and policies have been noticed, as well. The consultation results have been considered, yet due to the need to concentrate on the most important issues during the current programming period, only some of them have been included in the CIP. However, wherever the results cannot be considered, they will be a valuable input for future national policy planning and programming.

¹ At the "International Craft Faire" in Celje, September 2002; the "Implementation of Structural Funds" Conference in Bled, November 2002; the "Human Resource Development Conference" in Zreče, May 2003; the "Disability Law and Policy in the European Union" forum organised by the Slovenian Council of Disabled People's Organisations and the European Disability Forum in Ljubljana, June 2003; Congress of Volunteers in Novo mesto, December 2003; the "Europe and Adult Education in Slovenia" conference in Portorož, December 2003; at the "Consultations with ESF Partners" event in Ljubljana, December 2003, in parliament at two occasions, January and February 2004; at the nongovernmental organisation Ozara in Maribor, February 2004.

It is intended to continue the consultative process with the existing partners and other relevant bodies and organisations during the finalisation of the CIP, as well as during the implementation process.

1.2 Period of coverage of this Programme

The starting date of this Programme and the starting date for eligibility of expenditure is 1 January 2004; the end date for eligibility of expenditure is 31 December 2008.

1.3 Geographical coverage of this Programme

The geographical coverage of this Programme is the whole territory of Slovenia.

Part I: Programming EQUAL

Sections 2 to 6 of the CIP provide the theoretical underpinning to the EQUAL Programme.

Section 2 describes the labour market background in Slovenia, with particular emphasis on the problems that EQUAL could be used to resolve.

Section 3 describes the national and European policy context for activities under EQUAL.

Section 4 proposes a selection of Themes for the programme, based upon the need identified in section 2 and the policy objectives set out in section 3.

Section 5 describes the actions through which EQUAL operates.

2 THE LABOUR MARKET

2.1 Introduction

This chapter assesses the Slovene labour market. The first two parts of the chapter concentrate on general economic context and labour market situation in Slovenia, while the third part focuses on the labour market analysis in terms of groups exposed to discrimination and inequality and helps to identify priority areas for EQUAL funding.

2.2 General

2.2.1 General Economic Context

Slovenia covers 20,256 square kilometres stretching between the Alps, the Adriatic and the Pannonian. Slovenia has a population of 1,965,986 (0.5% of the EU population), of which 87.9% are Slovenes, the rest being attributed to ethnic minorities: Italian (about 0.2%), Hungarian (about 0.5%) and other ethnic groups (prevalled by the people from the former Yugoslav republics). The official language is Slovene, in nationally mixed areas also Italian and Hungarian. The number of population is stable, even though since 1996 the natural increase in the population has been negative, which means that Slovenia has seen an inflow of immigrants (inflow in the year 2001 accounts for 7,803 people and outflow 4,811 people).

The macroeconomic situation in Slovenia is generally stable, although in the year 2001 and 2002 economic growth slowed down to 2.9% after a period of more dynamic growth rates of Gross Domestic Product (GDP) (4%-5%). The year 2001 was characterised by a moderate growth of domestic demand mostly due to a slow growth in private consumption and decline in investment that on the other hand was joined by fast growing exports that exceeded the growth of imports.

Robust real export growth combined with improved terms of trade led to a sharp improvement in the current account. In 2002, the current account surplus rose to 1.7% of GDP, the highest level since 1994. At the same time, the usually low inward foreign direct investment flows reached record levels at 8.3% of GDP, mostly linked to privatisation in banking and pharmaceuticals, constituting the main part of capital inflows in 2002. However, the stimulus seems to have faded; FDI inflows have now returned to the low levels of previous years.

On account of the faster economic growth the development level of Slovenia, measured by GDP per capita by purchasing power, has grown from 67% (1998) to 70% (2002) of the EU average. The latest Eurostat data on GDP by purchasing power for the year 2001 place Slovenia by economic development level not only in front of the EU future members but Slovenia has also surpassed Greece and is reaching the development level of Portugal.

Provided that economic growth in the international environment stabilises, Slovenia's GDP is set to increase in the period up to 2006 at about the potential growth rate which has been estimated at 3.8% (Pre-accession Economic Programme 2003) using the Hodrick Prescott filter. According to autumn forecast of the European Commission, GDP growth should accelerate to 3.1% in 2004 and 3.7% in 2005 as domestic demand strengthens and export growth picks up with revived EU growth.

Inflation is expected to be cut further, but should still exceed the Maastricht criteria (1.5 percentage points above the average level of the three Member States with lowest inflation) when Slovenia accedes to the EU. For 2002, inflation stood at 7.5%, down from 8.6% in 2001. Increases in taxes, administered prices, and energy prices contributed most to a rise of consumer prices. Inflationary pressure is fed by lack of competition in various sectors, structural imbalances in the labour market, and still widespread indexation mechanisms. An accommodating monetary policy and a managed float exchange rate system further add to inflation inertia.

Table 1: Macroeconomic indicators

	1995-1999	2000	2001	2002
Change compared to previous year (%)				
GDP at constant prices	4.4	4.1	2.9	2.9
Private consumption	4.6	0.3	2.4	1.1
Public consumption	3.3	2.3	4.0	2.5
Gross fixed capital formation	14.8	2.6	-0.4	1.3
Exports (goods and services)	4.8	13.0	6.4	6.5
HCPI	n/a	8.9	8.6	7.5
In GDP (%)				
General government balance	n/a	-3.1	-1.3	-2.3
Current balance of payments	-0,8	-2,8	0,1	1,7

Source: European Commission, DG Economic Financial Affairs, Economic Papers, Autumn Forecasts 2003.

2.2.2 *The Labour Market: Employment, Unemployment, Skills and Performance*

The economic growth in Slovenia has improved the labour market situation only to a limited extent. According to Eurostat data, employment in Slovenia fell marginally while the unemployment rate increased to 6% in 2002 in comparison to 2001. From the point of view of the employment situation, the labour market is faced with the following main problems: (i) long-term unemployment; (ii) low educational attainment of unemployed persons; (iii) high rate of youth unemployment; (iv) regional and local imbalances in unemployment; (v) limited mobility of the labour force; (vi) gender unemployment gap; (vii) a substantial proportion of persons with disabilities and persons experiencing specific problems in their inclusion in the labour market among the unemployed and (viii) low participation of older people in the Slovenian labour market.

From the point of view of the educational system and the corresponding human capital, the Slovene labour market is faced with the following main problems: (i) low educational standard of the adult population; (ii) low level of functional literacy; (iii) weak links between post-graduate studies and requirements of the economy; (iv) low participation rate of adults in lifelong learning; (v) high school drop-out and repetition rates; (vi) education and training infrastructure not responsive to the needs of the economy, labour market and individuals; (vii) material barriers to further quality implementation of education and training; (viii) deficiencies in inter-institutional and inter-ministerial coordination at national and local levels of governance relating to development actions.

Employment

According to the latest Eurostat data employment in Slovenia increased from 858,000 employed persons in 1998 to 883,000 employed persons in 2002. There is also a positive trend in employment rate (62.9% in 1998 to 63.4% in 2002). The employment rate was the highest in 2001 when it reached 63.8%.

Both employment rates of men (68.2%) and of women (58.6%) decreased in 2002 regarding 2001. The employment rate of men in Slovenia in 2002 was lower than in the EU-15 (72.8%), while that of women was higher than in the EU-15 (55.6%).

Observation of employment rates by age groups in past five years Slovenia presents an increasing employment trend till the 2001 in the age group 25-54 years for both genders, for men in the age groups 25-54 and 55-64 years and for women in the age group 25-54.

The employment rate of young people (age group 15-24 years) is decreasing, reaching 30.6% in 2002 and is lower than in the EU-15 (40.6%), particularly for young women (26.5% in Slovenia and 37.4% in EU-15), which is a result of higher enrolment in secondary schools and universities.

Meanwhile, employment rates for older workers (age group 55-64) grew in 2001 and reached 25.5%, but in 2002 decreased to 24.5% and remains very low as compared to the EU-15 average of 40.1% (target of 50% by 2010). This is a consequence of the low retirement age that in 2001 averaged only 57 years and 2 months (59 years and 3 months for men, and 55 years and 5 months for women). Due to the pension reform introduced in 2000 the retirement age has already slightly increased. However, the impact of this reform will only gradually reflect in the higher employment rate of elderly.

Despite some favourable trends and reform of the labour market, Slovenia still lags behind the EU in terms of the flexibility of the labour market. The differences are large primarily in the percentage of part-time employment. In 2002 an average of 18.1% of persons were employed part-time in the EU countries, but the proportion was less than half this in Slovenia, where 6.1% had part-time employment in 2002.

The relationship between fixed-term employment and permanent employment has changed in the last decade: the share of men employed on the basis of fixed-term contracts is approximately 10%, while the share of women on fixed-term contracts is increasing, and reached 14% in 2002. Employers prefer to offer work on a fixed-term basis, because it is a more flexible form, and enables the adjustment of costs relative to economic growth from year to year. More than two-thirds of the reported vacancies were for offers of fixed-term employment, with the share of available jobs for fixed-term employment for 2000 reaching 70.2%, and for 2001 it rose to 72%. Among unemployed persons who found work, 74.4% were in fixed-term employment (average 7.7 months).

Employment structure by sectors shows that Slovenia lags behind the EU also in terms of employment rate in service sector (52.4% in 2002; EU-15 71%). Although, the employment in service sector has been growing but noticeably faster the employment of men (43.9%) than of women (62.6%), especially in the health and financial services. Positive employment trends are also seen in public sector. On the other hand negative employment trend still persists in deficit branches of industry (textile, leather and shoemaking).

In the end of year 2002, 80.8% of active working population was employed in enterprises and organisations, 8.4% was employed by self-employed persons, 6.4% was self-employed and 4.4% was farmers.

Table 2: Employment rates by gender and age groups, in %

Year	1998	1999	2000	2001	2002	EU-15
Total						
15-64	62.9	62.2	62.8	63.8	63.4	64.3
15-24	37.5	34.3	32.8	30.5	30.6	40.6
25-54	81.6	81.7	82.6	83.6	83.4	77.2
55-64	23.9	22.0	22.7	25.5	24.5	40.1
Men						
15-64	67.2	66.6	67.2	68.6	68.2	72.8
15-24	39.5	36.3	35.7	34.1	34.4	43.7
25-54	85.2	85.2	85.7	87.0	86.7	86.8
55-64	31.8	31.3	32.3	35.9	35.4	50.1
Women						
15-64	58.6	57.6	58.4	58.8	58.6	55.6
15-24	35.4	32.4	29.7	26.8	26.5	37.4
25-54	77.8	78.1	79.3	80.1	80.0	67.4
55-64	16.1	13.2	13.8	15.8	14.2	30.5

Source: Eurostat

Unemployment

Unemployment rate, according to the latest Eurostat data, has been decreasing from 7.4% (1998) to 5.8% (2001). The declining trend in unemployment was interrupted in the fourth quarter of 2001 when the unemployment rate grew to 7.1% and reached 6% in 2002. The unemployment rate in Slovenia is lower than in the EU-15 (7.7% in 2002).

From 1998 to 2002 the unemployment rate of men fell by 1.6 percentage points (from 7.3% to 5.7%), while decrease of unemployment rate of women was sluggish: 1.1-percentage points (from 7.5% to 6.4%). These data also show that women unemployment rate remained higher than the unemployment rate of men, but the unemployment rates of both were lower than that of EU-15, where unemployment rate of men in 2002 was 6.9% and of women 8.7%.

Despite the positive trends the structure of unemployed persons is unfavourable from the point of view of demand and opportunities on labour market. Among unemployed people, registered at the Employment Service of Slovenia, were in 2002 for example:

- 51.2% of women;
- 19.6% of first-job seekers;
- 21.7% of unemployed persons older than 50 years;
- 45.1% of unemployed with I-II degree of education;
- 55% of long-term unemployed (over one year).

Long-term unemployment had a negative trend, although 55% of unemployed people were unemployed for more than one year. In 2002 the long-term unemployment rate decreased to 3.3% (EU-15 3.0%) in comparison to 2001 (3.5%). Long-term unemployment is dominated by persons with just a basic level of education and those older than 40 years.

The age structure of the unemployed is also characteristic: in 2002 23.5% were older than 40 years and 21.7% are older than 50 years. Amongst workers made redundant, in recent years older and less educated workers who now have less employment possibilities have predominated.

The typically lower educational attainment of the unemployed is the greatest structural problem, with 45.1% of unemployed having only basic education - the employment possibilities of this category of the unemployed are low - more than a quarter of the unemployed have vocational education, more than a fifth have a secondary school education and 4.6% have a higher or university level education.

Skills and Performance

The education structure of the adult population in Slovenia is improving, but the share of persons with completed post-secondary education is still relatively low, and the inclusion of older persons in education and training and the level of functional literacy are still

unsatisfactory. Besides unemployment, poor education is the main determinant of poverty and social exclusion.

In Slovenia as much as 16.8% of the working age labour force has completed post-secondary education, 63.8% have secondary education, while 19.4% have only basic education. The activity rate of those with post-secondary education is 87.5%, of those with secondary education 73.4% and those with the basic education 48.3%.

Inclusion of young in education is increasing and the dropout is decreasing (14.1% of the generation 1992-1997 did not complete any secondary school, for the generation 1993-1998 the proportion was 13% and for the generation 1994-1999 it was 11.6%), although it is still relatively high (13%), mainly in lower vocational education (31.9% of the generation 1993-1998 have not completed lower vocational education). More detailed analysis has shown that dropouts were higher in programmes in which pupils have re-enrolled from other programmes in which they have already been unsuccessful.

There is no fundamental difference by sex, though dropping out is generally lower among girls. There is a characteristically high dropout rate among first-year pupils, and in the fourth year almost none. Another indicator, the proportion of early school-leavers, shows an improvement in the situation in this field in recent years (in 1995 the figure was 10.8%, while in 2002 it was 5.0%, and 18.9% in EU-15). However, it does not include the population below 18, where according to earlier data dropping out was higher.

Although, the educational level of youth has significantly improved, of labour active youth 20% have post-secondary education, 68% have secondary education and only 11.7% basic education. The educational level of the labour force is improving due to young generation – the number of university degrees is increasing.

Employed women are 4.6% more educated than men measured by the average school years of employed people. The average woman has 11.4 years of education and training, while man has on average of 10.9 years. Gender difference in education is the highest with those that have a university education, 12.5% of employed women and 10.4% of employed men have a university degree.

The introduction of the lifelong learning concept in Slovenia is still in an early phase – the participation rate (32.4%) in lifelong learning is low - in year 1999 only 136,195 of employed adults participated in different forms of education and training. Investment by employers in human capital development is relatively low.

Slovenia has a rich network of educational institutions; however the educational system programme does not quickly enough follow the new demands for modern approaches in the field of the training and re-training of the labour force or the gaining of qualifications for vocational professional training. The process of adapting – or restructuring the school network in terms of the needs of labour market, is too slow. Cooperation between the school system

and the labour market is too weak also in the field of educational infrastructure, especially concerning the information technology infrastructure of schools.

2.2.3 Conclusions

The analysis shows moderate but positive trends on the labour market in Slovenia. These trends are expected to continue, although negative trends could be caused by: i) stagnant employment in the industrial sector and decreasing employment in the segment of medium-sized and large enterprises; ii) unemployment rate being below the EU average and with a favourable decreasing trend yet characterized by serious problems, such as: high level of persons are long-term unemployed, unskilled and older than 40 years, and people with disabilities; on the other hand youth unemployment is persistent and the number of first job seekers has been increasing; iii) low educational attainment of adult population and a relatively high rate of school dropout.

The main development goal in Slovenia as defined in Strategy for the Economic Development is to increase the prosperity of people living in Slovenia in a sustainable manner, with prosperity being defined as a balance between economic, social and environmental components. One way to achieve prosperity is also strengthening Slovenia labour market and tackling its weaknesses. A stable macroeconomic environment is an essential precondition for employment opportunities, but there are other factors that are equally important. The aim of Slovene Government is to provide employment opportunities for all and help people to take up those opportunities. A set of the opportunities can be found especially in the active employment policy measures through which more attention is paid to reducing above mentioned structural imbalances. In this way, the improvement of basic employability of the labour force and maintenance of that employability on a long-term basis is guaranteed.

Apart from Government Policy and the Structural Funds actions funding the EQUAL programme will contribute towards addressing some of the mentioned problems by promoting and testing new ways of combating the discrimination and inequalities faced by those groups most disadvantaged in the labour market. These include people with disabilities, women, young people, older workers, ethnic groups (Roma), ex-prisoners, drugs and alcohol abusers, asylum seekers and those discriminated on the basis of their sex orientation. The following section deals with the labour market disadvantages faced by these groups in terms of the thematic fields of EQUAL Initiative.

2.3 Labour Market Analysis in terms of discrimination and inequalities

Social situation in Slovenia inevitably deteriorated during the transformation depression, but in the second period of transition it started to improve again, mostly as a result of the active social policy and the fact that the social security systems were not allowed to degrade during the period of transition. Nevertheless, marginalisation of certain social groups can be perceived as a negative side effect of the transition process. This applies especially to vulnerable groups of people as identified during the preparation of Slovenia's Joint Inclusion Memorandum (JIM). According to the JIM, vulnerable groups include in particular persons with disabilities, the homeless and Roma.

Apart from these groups that already receive much attention and are treated with special measures (described in detail also in Chapter 3.3.), smaller groups of people with special needs include women, young people, older workers, ex-prisoners, current and former drugs and alcohol abusers and those discriminated on the basis of their sex orientation and asylum seekers. There is not much data available about some of these groups that would give a full picture of their situation on the labour market.

What the individuals from these groups have in common is that due to diverse problems they usually face an extremely poor social and economic situation, stretching over a longer period of time. They are discriminated on the labour market, and therefore find it very hard to get employment. Many become apathetic and unmotivated to seek employment and are consequently permanently dependant on social benefits. A research study on social and economic inclusion of deprived groups² carried out in 2003 identified the following factors that determine the unfavourable labour market situation of individuals from the vulnerable disadvantaged groups:

- Specific problems of individuals due to which their work abilities are limited (e.g. the drug or alcohol abuse, homelessness, being a victim of domestic violence)
- Low levels of education and problems with functional literacy (most of the identified vulnerable groups)
- Long periods of absence from the sphere of work (i.e. longer periods of dependencies, periods of rehabilitation, periods spent in prison, periods of homelessness, etc.)
- Apathy and low motivation for job search and for employment
- Attributed stigma and distrust of employers.

Work with these groups is mostly focused on resolving the acute problems of their members, and is carried out by crises centres and centres for the assistance to victims of all crimes, women's shelters and refuges for female victims of violence and children, information centres, day centres and apartment-sharing communities for people with mental health

² Research study: Social and economic inclusion of deprived groups: Possible measures to increase the employability of the most vulnerable categories of long-term unemployed and inactive persons (Co-financed by the European Commission, Ref. No. VS/2003/0068).

problems. Centres for social work are the public authorities responsible for persons undergoing post-penal treatment.

2.3.1 People with disabilities

According to analysis carried out in 2002 there are 168,755 persons with disabilities in Slovenia – that is 8.48% of all population and 5.4% of working-age population. At the end of the year 2001, 28,967 persons with disabilities were fully employed.³ Among them at the end of 2001 there were 22,813 employed on the open labour market and the remainder in sheltered companies. By the end of 2002 the number of employed persons with disabilities slightly decreased to 27,373. At that time the Employment Service of Slovenia registered 14,493 persons with disabilities as seeking job. According to this data, there are nearly 44,000 persons with disabilities on the labour market.

The number of registered unemployed persons with disabilities has been fast increasing in past years. The proportion of persons with disabilities of the total unemployed amounted to only 5.7% in December 1995, but in December 2000 it was 16.4% and 17.9% in December 2001. Among the registered unemployed people there were 14,493 people with disabilities (18,684 by the end of 2001). Among them 86% were occupationally disabled persons, 7% young and 7% adult persons with disabilities.

In 2002, the change of Employment and Unemployment Insurance Act about the evidence of unemployed exclude unemployed, who are not active job seeker or employable. The share of persons with disabilities therefore decreased to 14.5% in December 2002.

The main causes for inflow into occupational disability were musculoskeletal diseases and mental and behavioural disorders, the latter being the main cause for new cases of occupational disability. The third cause for incidence of occupational disability is cardiovascular diseases.

There are some patterns connected with disability in Slovenia:

- Higher disability rates among older persons (82% of persons with disabilities are older than 40 years)
- Probability of becoming person with disability with age is higher for women
- Persons with disabilities have lower education (62% of persons with disabilities are without vocational education).

The employment of persons with disabilities in sheltered companies is now the most appropriate, sometimes their only, possibility for employment. There are 151 sheltered companies (data from February 2002) and they employ 6,202 persons with disabilities and

³ The data collected on the basis of questionnaire LP - Zap, which is used by Employment Service of Slovenia.

6,767 non-disabled persons. The status of a sheltered company can – with the prior consent of the Government – be granted to a company that throughout the financial year trains and employs people with disabilities, representing at least 40% of all employees of the company.

Sheltered companies train and employ people with disabilities who on account of their disability and reduced working capacity cannot receive training and find employment under the same conditions as other people with disabilities. On the market, sheltered companies do not differ from other economic agents. Nevertheless, they have a special legal status with regard to taxes, employment relationships, social security and so on. They are entitled to monthly compensation as part of the wage for the employed people with disabilities. Sheltered companies are exempt from corporate income and payroll taxes. Social security contributions for the employees are paid to a special employer's account and used for material development of the companies.

In order to improve the position of one of society's weakest groups, the Ministry of Labour, Family and Social Affairs prepared a special Strategy for Training and Employment of Disabled Persons 2003-2006. This strategy directly contributes to realising strategic goals from the National Programme for Labour Market Development and Employment 2001-2006.

A draft for a new Act on the Employment Rehabilitation and Employment of Disabled Persons has been prepared on this basis and is expected to be adopted by the Parliament at the beginning of 2004. The new statutory provisions require wider changes in this field, since the current legislative organisation of training and employment of persons with disabilities dates from 1976. In addition to social reasons, economic arguments also dictate changes in this field, since measures introduced prior to 1990 discourage persons with disabilities from active efforts to seek training and employment opportunities. The aim of the Act is to provide disabled persons with suitable training courses and their employment in specialised forms and on the open labour market, based on their skills and abilities for work and independent life.

The Act introduces the following innovations:

- The right of rehabilitation for employment, which would be carried out by regional rehabilitation centres;
- Sheltered employment in protected workplaces for disabled persons, who despite rehabilitation can only be employed on certain conditions in regional and local centres;
- Supported employment with professional, technical and material support to employees and employers who employ disabled persons and subsidise their wages;
- A quota system as an obligation for employers to employ a specific number of disabled persons out of the total number of employees.

The Act also envisages the establishment of a public fund into which funds will be placed for employment support for persons with disabilities (funds from employers who do not employ the specific number of persons with disabilities under the quota system and other funds).

2.3.2 Women

Women in Slovenia formally have equal rights and opportunities in the labour market as men, but there are some barriers and disadvantages for women on the labour market in Slovenia.

The employment rate of women decreased in past years, but gender labour activity gap in Slovenia is close to 10 percentage points. Slovenia has been a country with a high female activity rate, and particularly high female employment rate for more than fifty years. Besides the political reasons, the economic necessity and desire to attain a higher standard of living have stimulated mothers to enter the labour market and not to leave it after childbirth.

Even though employed women are more educated than men and have obtained higher education and training than man, as explained in labour market analysis, women are present far below the average in the top and best paid jobs: legislators, senior officials and managers (31.8%). The share of women among the persons in employment is according to the Labour Force Survey Results in 2001 above the average in the following occupations: clerks (66.6%), service workers and market sales workers (62.8%), professionals (59.3%) and elementary occupations (59.9%). Female labour force is prevailing in health and social care, education and culture, tourism, trade and financial services.

According to the results of statistical annual sample survey of wages by professional level and activities data clearly present the gender pay gap -12.2% (2000) and -10.8% (2001) to the prejudice of women. Taking into consideration the higher education of women than men the actual gender pay gap, measured by gender human capital gap, is even bigger -16.8%.

Considerable progress has been made in Slovenia at the legislative level in ensuring gender equality. In July 2002 the Act on Equal Opportunities for Women and Men came into force, which introduces an integral approach to creating equal opportunities and encouraging gender equality. The Act is of a general nature and determines overall guidelines or foundations that will be a guide for legislation in individual areas. The law defines gender equality among other things as the removal of obstacles to establishing gender equality, especially by preventing and removing unequal treatment on grounds of gender as forms of discrimination in practice deriving from traditional and historically conditioned different social roles, and the creation of conditions for creating equal representation of the two genders in all spheres of social life.

The first case in which gender discrimination is explicitly mentioned is the Employment Relationship Act, which came into force on 1 January 2003. The Act prohibits indirect and direct discrimination, ensures equal opportunities and the equal treatment of women and men in employment, promotion, training, education, vocational training, wages and other income arising from the employment relationship, bonuses, absence from work, working conditions, working time and terminating employment contracts. It introduces the so-called reversed burden of proof, prohibits the advertising of vacant jobs for men or women only, in concluding employment contracts prohibits obtaining data from the applicant on family or marital status, data on pregnancy, on family planning or other data if such data are not directly

connected with the employment relationship, guarantees equal pay for equal work and for work of equal value and regulates protection of workers in the event of pregnancy and parenthood (prohibition of carrying out work during pregnancy and breast-feeding period, protection during pregnancy and parenthood with regard to night work and overtime work, the right to breast-feed). It also determines the method of exercising and protection of rights, and inspection supervision.

The Parental Protection and Family Benefits Act, which came into force on 1 January 2002, is very important for harmonising the spheres of work and family life. Mothers have the right to maternity leave for a period of 105 days. Childcare leave (for a basic period of 260 days) is the right of both parents, but they must reach agreement on the use of this leave. The Act introduces a completely new right by which father is entitled to 90 calendar days' paternity leave. For the first 15 days, which he has to use during the mother's maternity leave, he receives 100% wage compensation (paternity benefit), while for the remaining 75 days (which he has to use until the child is 8 years of age) he is entitled to the payment of social security contributions from the minimum wage.

2.3.3 *Young*

Among young people in the age from 15 to 24, the lower activity rates are registered (36.6% in 2002; age group 25-54: 88.1% in 2002) and at the same time a higher rate of unemployment than in the older group of unemployed. The main reason is that young people in this age continue an education process and are less active. On the other hand, the reasons for higher unemployment rate of young people (15-24 years) are the problems of transformation from education to labour market and a general situation at the labour market in Slovenia.

This transition from education to employment remains problematic, especially because of the structural characteristics of the labour market, more specifically of the mechanisms of the labour market, like a big inflow of young first job seekers in the certain periods, a structure of working places on local and regional level, untypical forms of work, relative openness or closeness of the employment in certain periods, the relation of the employers towards the employment of young people etc. Even though the big changes on the labour markets are more convenient for more flexible labour force, including young, the young people in the transformation from education to labour market remain a vulnerable group.

Young persons seeking their first employment represent a quarter of the inflows into unemployment, but the growing trend since 1998 onwards stopped in 2002 and their number was 2.1% lower than in 2001. The employers see young people as a labour force with less or with no working experience and working practice; so to employ young people means a bigger risk for them. The result is that young people get more temporary and flexible jobs, but not permanent jobs. The analysis in Slovenia showed that the employers see working experiences as most important additional condition for employment, right after the education.

Among young unemployed there is a high number of young unemployed women. In this age (period) young women usually create a family so the employers do not want to employ them, as there is a bigger possibility they are absent from work (pregnancy, sick leave for children etc.). In general, in the year 2002 there were 18.7% young unemployed women and 15.2% of men in the age group 15-24 years.

The educational level of the labour force is improving due to young generation – the number of university degrees is increasing. In year 2001 20.4% of youth in age from 25-29 has completed the university education. On the other hand there is still quite high number of young people that enter labour market without education, with low education or with inappropriate education. Especially problematic group among young people are dropouts – young people that left the school from different reasons before they finished secondary school or gained qualifications. On average there are 13% of dropouts. Young people without professional qualifications are the most problematic group of young people. Their employment opportunities are low, working places and professions they can apply for mean a low level of social security.

The systemic and content changes to the educational system began in 1995 with the adoption of new school legislation (Pre-school Institutions Act, Elementary School Act, Vocational and Technical Education Act, Gimnazije (grammar schools) Act, Adult Education Act), followed by the revision of curricular documents and the implementation of revised programmes.

The following measures have already been carried out to reduce the dropout rate:

- Extending the network of schools and enrolment places in order to enable pupils to enrol in their preferred programme;
- Counselling service in vocational guidance;
- Introduction of the dual system in secondary school education;
- In-service teacher training, which contributes to a higher quality of the educational process, which in turn can help reduce dropouts.

In future policy it is important to achieve the following aims:

- To continue to devote considerable attention to reducing the dropout rate
- To complete the content updating of vocational and professional education, mainly through the introduction of a certificate system
- Further increasing the proportion of the population, especially young generations, in higher professional and university education
- The guiding principle of all education and learning becomes lifelong learning.

2.3.4 *Older workers*

The employment rate of older persons (age group 55-64) grew in 2001 and reached 25.5%, but in 2002 little decreased to 24.5% and remains very low as compared to the EU average of 40.1% (target of 50% by 2010). This is a consequence of the low retirement age that in 2001 averaged only 57 years and 2 months (59 years and 3 months for men, and 55 years and 5 months for women).

Among the registered unemployed, in April 2002, 21.7% were older persons, over 50 years of age (in 1998 19%). In 2001, the unemployment rate of persons aged 50-64 was 4.8% and was very close to that of age group 25-49 (5.1%). In 2002, the unemployment rate of persons aged 50-64 decreased to 4.3% and it is still higher than unemployment rate for older persons aged 55-64 (3%), which is less problematic group.

Amongst workers made redundant, in recent years older and less educated workers who now have less employment possibilities have predominated. While the inclusion of young persons in education is high (the net enrolment quotient in groups up to 29 is higher than in the EU), the inclusion of adults in formal education is still low for older age groups. The net enrolment quotient in all three levels of education is below the average in the EU. The level of lifelong learning, measured by participation of adults in education and training (5.1% in 2002 - structural indicator) is also considerable below the European average (8.4%).

According to the findings of Association of seniors' organisations of Slovenia, older workers are often in less favourable position on the labour market than younger ones. From their point of view the biggest problems that older workers are faced with are:

- Laid off workers, age 45 and more, have great difficulties getting a new job, specially when their educational level is low,
- Lack of individualized support measures to help older workers re-enter labour market,
- Lack of awareness of the benefits of retraining older workers,
- Insufficient income support in the period between job loss and retirement,
- Lack of transition-to-retirement measurers, which would contribute to the adjustment to new daily routine and new activities.
- Inability to support oneself with insufficient pensions in combination with lack of possibilities to get a paid part-time job.

2.3.5 Roma

The Roma community has the status of a special ethnic community in Slovenia. The Roma ethnic community live in more or less concentrated groups or settlements in Pomurje (north-east of Slovenia), and Dolenjska, Posavje and Bela Krajina (south-east of Slovenia), while individual families and small groups live in other areas of Slovenia. According to the 2002 census, 3,246 persons (0.17% of total population) declared themselves to be Roma, while estimations show that the community numbers between 7,000 and 10,000.

According to JIM, the current labour market situation in Slovenia is not particularly favourable to Roma. Lack of basic qualifications, functional illiteracy and the prejudices of employers contribute to the situation in which the working activity of Roma is much lower than that of the majority population in Slovenia, regular employment is rare, and irregular forms of work predominate (there are no exact data available, however, only estimates). Under legal provisions on protection of personal data, data on ethnic affiliation of the unemployed are not kept in the records of the Employment Service of Slovenia (ESS).

However, it is estimated that 98.2% of registered Roma unemployed in Regional Office in Novo Mesto (south-eastern part) did not complete primary school and 90% in Regional Office Murska Sobota (eastern part). The number of registered Roma job seekers is gradually increasing, but does not exceed 2,300 (February 2003 estimate).

In November 1995, the Government adopted a Programme of measures for the assistance of Roma, by which it determined a policy of integration of the Roma community. The programme is implemented through the preparation of programmes and measures in the areas of employment, education and housing. Ministries responsible for different domains are responsible for the preparation of the programmes and measures and for their implementation, while the Office for Nationalities is responsible for coordination and monitoring.

Concerning education the Ministry of Education, Science and Sport ensures the inclusion of Roma children in pre-school programmes for at least two years prior to starting school (in cooperation with the relevant municipalities), additional teaching hours with Roma pupils for providing teaching in small groups outside normal classes, financial support for initiatives by schools for implementing forms of care and education work that encourage their socialisation, funds for school meals for Roma pupils, and assistance in buying textbooks.

In addition, some special programmes for the employment of Roma have been prepared (the last one in 2000). The Ministry of Labour, Family and Social Affairs in cooperation with the Ministry of Education, Science and Sport started preparing Action employment programme for unemployed Roma in the spring of 2003. It is expected to be adopted by the Government in the beginning of 2004. The aim of the programme is to increase employment opportunities for Roma and to reduce the number of unemployed Roma by means of the following measures: to include young unemployed Roma in primary and vocational schools, to include adult Roma in programmes of subsidised jobs (in cooperation with Roma associations and local communities), to create public works (for learning assistance) in order to reduce school drop-outs, to employ Roma advisers in public employment services.

2.3.6 Asylum Seekers

According to Annual Report on Work of Ministry of Interior for 2002, the number of application of asylum seekers decreased in 2002 to 646 in comparison with the previous two years when it reached 12,943 (2000) and 1,882 (2001). But the number started to increase again in the first half of 2003. The most of asylum seekers come from Turkey, Iraq, Serbia and Montenegro, Bosnia, Iran, Macedonia, Algeria, Russia and Georgia. Among the asylum seekers in Slovenia there is a high rate of young or middle-aged men (approximately 80% of all asylum seekers). Asylum seekers stay in state accommodation in average for 179 days.

Asylum Act implementing the 1951 Geneva Convention relating to the Status of Refugees states that asylum seekers have the right to temporary or periodical job if they request it. This right is further developed and conditioned in Law on Temporary Refugees. Slovenian authorities can accordingly issue a special note, allowing the asylum seeker to get the temporary or periodical job. Sector for Asylum at Ministry of Interior issues a small number

of such notes, especially for season works in construction, mechanics workshops and cleaning.

The number of asylum seekers so far has been low because of the following reasons:

- For the most of the asylum seekers Slovenia is only transit country, and they usually leave the country after approximately six months.
- It is hard to find employment for some of asylum seekers that show interest for it, because they can usually choose only among manual seasonal work. This is especially a barrier for women asylum seekers and asylum seekers with higher education.
- There are other sources of discrimination for the asylum seekers and for those who get the status of refugee, such as communication barriers and prejudices (there is a prejudice for asylum seekers from African states that they do not have working habits, for example).

According to estimations of the Ministry of Interior Slovenia will become more interesting for potential asylum seekers after the accession to the European union. Therefore, especially the right to work of asylum seekers should be better legally regulated. On the other hand, the barriers for work of asylum seekers and especially for those, granted the refugee status should be suppressed.

The Report on Situation of Foreigners, Asylum Seekers and Refugees in Slovenia 2001-2003, made by Slovenian Legal-informational centre of non-governmental organisations, establishes that especially programmes for integration on the governmental level should be developed. The nongovernmental organisations already carry out some programmes of integration of persons under temporal protection (legal assistance, assistance by seeking employment, psychosocial help, etc.).

2.3.7 Victims of trafficking

The US State Department report on human trafficking of July 2003 placed Slovenia among the countries that did not meet all the standards yet but has made significant efforts in this direction. Among them are government activities, including those implemented by the Inter-Ministerial Working Group for fight against human trafficking as well as the efforts within the Stability Pact for South and Eastern Europe (SP SEE).

The signing of a special agreement on co-operation in preventing human trafficking by the Minister of the Interior and the State Prosecutor General with the NGO Ključ (Key) in 2003 sets down the legal framework for the victims' stay in Slovenia, giving them internationally comparable protection and the chance to exert their rights. The agreement means that Slovenia has started fulfilling the commitment that it made in July 2003 with the signature of a special statement of commitment in the framework of Stability Pact. With the agreement

Slovenia has made a transition from purely repressive measures to tackle human trafficking, to providing social protection and other forms of assistance to the victims.

Although Slovenia acts as a destination country, transit country and country of origin in the international trafficking in persons, police, according to unofficial data, only dealt with 21 cases of prostitution and 10 cases of forced or bonded labour in 2002. A total of 55 persons were indicted on prostitution and human trafficking charges, while 28 persons were registered as victims of these criminal acts. In the prevention of illegal migration, Slovenia has also been successful since the number of illegal immigrants intercepted has dropped significantly. While some 35,000 illegal immigrants were apprehended in 2001, the figure dropped to about one tenth of that in 2003.

Human trafficking also includes trafficking in human organs, child prostitution and slavery, but trafficking in persons coerced into prostitution is the most common phenomenon in Slovenia. Some estimates suggest that 1,500 to 2,500 women forced into prostitution travel across Slovenia each year. Figures are hard to verify since police only discovered 69 persons last year. Also in 2002, five girls aged 17 were sold abroad from Slovenia, and 25 are estimated to have been sold into Slovenia. According to Ključ, the figures are even higher. The organisation maintains that between 2,000 and 5,000 women are transported across Slovenia each year, while an estimated 1,500 stay in the country's seventy-odd nightclubs.

A number of additional instruments have been put in place as well. Among others, the EU provided EUR 100,000 to Ključ through Phare's "Witness" programme, which has enabled the organisation to purchase a safe house, issue publications, train volunteers and set up a therapy group for the rehabilitation of victims. Co-operation between governments and NGOs is crucial in this area. NGOs can play a significant role in assisting victims, providing for their protection, well being, social security and help in returning to their homeland.

2.3.8 *Ex-prisoners*

The number of persons in post-penal treatment in Slovenia is relatively constant and, according to the Social Services Centres' estimate reaches around 1,100⁴ annually. For men and women held in prison, loss of freedom means permanent stigma and feeling inadequacy to cope with the life outside the prison walls. Ex-prisoners often loose ability to reintegrate into social environment. Basically, they feel segregated, unsecured, they have very bad self-esteem, negative self-image, low self-respect, inappropriate social skills to build-up healthy and effective social network, usually they loose their working habits, and even more, their knowledge and skills are outdated. As a consequence, they often continue with a criminal career after they are released (approximately 70%). Persons in post-penal treatment frequently face multiple difficulties ranging from alcohol and/or drug addiction, homelessness, mental health problems and violence. Many persons in post-penal treatment used to be unemployed

⁴ Research study: Social and economic inclusion of deprived groups: Possible measures to increase the employability of the most vulnerable categories of long-term unemployed and inactive persons (Co-financed by the European Commission, Ref. No. VS/2003/0068).

before imprisonment, and after they are released they rarely register with the Employment Service of Slovenia.

The Social Services execute programmes of post-penal treatment in prison starting immediately after imprisonment by defining individual needs and aims. The most common activities are the actual social situation problem solving, stress management counselling, social counselling, family skills and employment support during the imprisonment and after release, and treatment for addictions. There are no unified employment preparation programmes for prisoners. Prison experts work with the prisoners individually, searching different possibilities to help and support them according to their needs.

Special follow-up programmes to support successful reintegration and offer possibility to develop, change and gain appropriate behavioural patterns could help persons in post-penal treatment in the process of reintegration in their communities. However, in Slovenia there are no organised support networks⁵ for ex-prisoners to assist them in the process of reintegration. Furthermore, if the person does not register with the Employment Service, he/she is not entitled to any support from the active employment policy programmes.

2.3.9 *Homeless*

The number of homeless has been slowly yet continually increasing during the transition period. Assessments on their numbers range between 800 and 1,000. The main problems of the homeless are in particular housing and health, which cause also poor chances for employment. With only three shelters with approximately 60 beds and some shelters run by the Caritas, the problem of housing is not improving. In 2002, an outpatient department started to operate in Ljubljana offering basic and specialist health care for homeless people. Municipalities run the homeless shelters in cooperation with various local organisations, the state co-finances direct work within the shelters (information provision, counselling, organising basic personal documentation, etc.).

According to the study made by Faculty of Social Sciences, the situation for homeless people on the labour market is very difficult. If they search for a job, they often get one, but it is only temporary as for example help on the farms, seasonal works, cleaning, etc., but more often they get a job on a black market. The study mentions the following main causes for the discrimination of homeless people on the labour market:

- The appearance and inefficient communication skills.
- Health problems reducing ability for work.
- None or inadequate working habits, vocational qualifications and skills because of longer periods of homelessness and exclusion from the labour market.
- Lack of functional literacy and ICT knowledge.

⁵ See analysis conducted under the project entitled “EXIT – Occupational and social reintegration of prisoners in post-penal treatment” carried out in Slovenia, UK, the Netherlands, Germany and Estonia under the Leonardo programme.

- Attributed stigma and distrust of employers.

The problem of homelessness is addressed within a range of programmes in the fields of housing, social services and health. The National Social Assistance and Services Programme 2000-2005 envisages the expansion of a network of five reception centres and shelters in different Slovene towns, providing an additional 100 places for homeless people. The National Housing Programme envisages the provision of temporary accommodation to prevent homelessness. The new Housing Act regulates this.

There are no special programmes in Slovenia concentrating on reducing barriers for employment of homeless people. Especially younger homeless can be included in programmes of psychosocial rehabilitation, but also vocational rehabilitation that would follow the psychosocial rehabilitation would be needed. The rehabilitation of homeless persons is demanding a lot of time and should be gradual.

2.3.10 Discrimination on the basis of sexual orientation

In Slovenia being different on the basis of sexual orientation was long time seen as a credible excuse to discriminate people and treat them unequally or put them in unfair position in different areas of everyday life, including employment. Sexual orientation and especially the discrimination on the basis of sexual orientation is the subject of two laws in Slovenia. The Personal Data Protection Act adopted in 1991 talks about sexual orientation and in the Article 3 it prohibits collecting the data about sexual orientation of individuals without their written approval. The Article 6 of the Employment Act that was adopted in 2002 prohibits that employer treat unequally the employees on the basis of sexual orientation. It prohibits direct or indirect discrimination at work place on the basis of sexual orientation. The Employment Act does not explicitly mention - within the not accepted reasons for dismissal from a job e.g., race, colour, gender, age etc. - the dismissal on the basis of sexual orientation.

Unfortunately there is no statistical data about unemployed caused by discrimination on the basis of sexual orientation in Slovenia. But this is one of the issues addressed in the Report on the Survey on Sexual Orientation Discrimination in Slovenia. In the survey 172 persons completed the questionnaire, among them 43.6% were women and 52.9% were men (3.5% provided no information on their sex). 40.7% of respondents indicated that they were under 25 years old, 42.2% stated that they were over 25, and 16.9% provided no information. According to survey 2.9% respondents reported that they had been dismissed from a job because of their sexual orientation, while further 2.3% suspected that they had been dismissed for this reason. Those who reported that they had definitely been dismissed because of their sexual orientation represent 10% of those whose sexual orientation was definitely known. 7% of respondents reported that they experienced discrimination when applying for job, while further 7% suspected that they had. 14% of all respondents reported that they had been denied promotion because of their sexual orientation, while further 14% suspected this to be the case.

2.3.11 Conclusions

The above labour market analysis in terms of discrimination and inequalities focuses on the position of some of disadvantaged groups on the labour market in Slovenia, and on individual characteristics/problems that characterise that position. As explained, there are some factors which determine the unfavourable labour market position that are common to the individuals from the majority of the described disadvantaged groups. These factors range from those inherent to individual members of disadvantaged groups, such as specific problems of persons due to which their work abilities are limited, low levels of education and functional literacy, long periods of absence from the labour market, to those deriving from the environment, such as attributed stigma and distrust of employers.

The factors determining unfavourable position of the disadvantaged groups on the labour market should be especially tackled by development partnerships of EQUAL Programme.

Apart from the unfavourable factors that are common to the majority of disadvantaged groups, the above analysis also mentions some of the most problematic characteristics of the position of each disadvantaged group separately. In order to sum up the above analysis and to point out the most important aspects the SWOT analysis below has been drawn up.

2.4 SWOT Analyses of the Labour Market

Table 3: SWOT: Employment, Unemployment, Skills and Performance

<p>Strengths</p> <p>Moderate employment growth;</p> <p>Unemployment rate (LFS) below the EU average;</p> <p>Highly qualified younger generations of labour force;</p> <p>Higher educational attainment of women than that of men;</p> <p>Favourable activity and employment rates;</p>	<p>Weaknesses</p> <p>Structural problems in registered unemployment (long-term unemployment, unemployment of unskilled and disadvantaged persons, first job seekers and youth unemployment);</p> <p>Low employment rate of older workers (above 55 years);</p> <p>Low participation rate in lifelong learning;</p> <p>Persistent gender employment gap and above all low employment rate of older women;</p> <p>Persistent gender pay gap, the widest and newly increasing is with the university degree;</p>
<p>Opportunities</p> <p>Increasing labour market flexibility;</p> <p>Active labour market policy measures aimed at increasing employability, focused on those with difficulties in (re)entering the labour market;</p> <p>Job growth in the service sector;</p> <p>Job growth in the SME sector;</p> <p>Increasing educational attainment of labour force;</p>	<p>Threats</p> <p>Decreasing employment in the labour intensive industry;</p> <p>Decreasing employment in medium-sized and large enterprises;</p> <p>Increasing unemployment of unskilled workers;</p> <p>Lack of local approaches to identifying employment opportunities;</p>

Table 4: SWOT: Discrimination and Inequalities

Theme 1: Facilitating access and return to the labour market	
<p>Strengths</p> <p>Highly qualified younger generations of labour force;</p> <p>Introduction of the lifelong learning concept;</p> <p>Intensification of training processes in companies.</p>	<p>Weaknesses</p> <p>Low educational attainment of the unemployed, particularly among disadvantaged groups;</p> <p>Structural problems in registered unemployment (long-term unemployment of unskilled and disadvantaged persons);</p> <p>Low level of functional literacy in the age group 15-64;</p> <p>Specific problems of individuals from vulnerable groups (disabilities, drug or alcohol abuse, homelessness, etc.);</p> <p>Underdeveloped practice of lifelong learning;</p> <p>Educational and training infrastructure not responsive to the needs of the labour market;</p>
<p>Opportunities</p> <p>Relatively high percentage of public expenditure on education in GDP;</p> <p>Moderate employment growth;</p> <p>Job growth in the labour intensive services sector;</p> <p>Increasing labour market flexibility;</p> <p>Opening of the EU labour market;</p> <p>Well-organized public employment service, also on the regional level.</p>	<p>Threats</p> <p>Limited employment opportunities for disabled, older persons and the Roma;</p> <p>Low share of part-time jobs available;</p> <p>Decreasing employment in the labour intensive industry;</p> <p>Possible inflow of educated and well trained labour force from the EU countries.</p>
Theme 5: Promoting lifelong learning and inclusive work practices	
<p>Strengths</p> <p>Promotion of the lifelong learning concept;</p> <p>Intensification of training processes in companies.</p>	<p>Weaknesses</p> <p>Low participation rate in lifelong learning;</p> <p>Low level of functional literacy in the age group 15-64.</p>
<p>Opportunities</p> <p>Increasing labour market flexibility;</p> <p>Active labour market policy measures focused on those with difficulties in (re)entering the labour market;</p> <p>Number of computers per 100 inhabitants comparable to that in the EU.</p>	<p>Threats</p> <p>Educational and training infrastructure not responsive to the needs of the labour market.</p>

Theme 8: Reducing gender gaps and supporting job desegregation	
<p>Strengths</p> <p>Higher educational attainment of women than that of men;</p> <p>High activity and employment rates of women in Slovenia;</p> <p>Gender pay gap below that in the EU average.</p>	<p>Weaknesses</p> <p>Substantial gender employment gap;</p> <p>Low employment rate of older women;</p> <p>Wide and persistent gender pay gap;</p> <p>Substantially lower number of women (as compared to men) in management and leading positions in firms.</p>
<p>Opportunities</p> <p>No serious gender obstacles for improving the qualifications and skills;</p> <p>Extensive and generous policy measures that enable reconciliation of professional and family life (long and fully paid maternity/parental/paternity leave, available and affordable childcare; appropriate labour legislation).</p>	<p>Threats</p> <p>Labour contracts that discriminate persons planning to have children or having small children.</p>
Theme 9: Supporting the social and vocational integration of asylum seekers	
<p>Strengths</p> <p>Relatively small number of asylum seekers.</p> <p>Existing NGO's programmes of integration of asylum seekers</p>	<p>Weaknesses</p> <p>There is not a lot of demand for employment by asylum seekers.</p>
<p>Opportunities</p> <p>Asylum seekers have the right to temporary jobs.</p>	<p>Threats</p> <p>For most of the asylum seekers, Slovenia is only a transit country.</p>

3 THE POLICY CONTEXT FOR ACTION UNDER EQUAL

3.1 Introduction

The European Employment Strategy is laid down in the Employment Title of the Treaty of Amsterdam. Through a set of Employment Guidelines, the European Employment Strategy supports and guides Member State's work towards combating unemployment, increasing employability and flexibility, improving the adaptability of the labour market, and improving gender equality in the workplace.

The Member States agree Employment Guidelines annually to steer the development of their employment policies, and report upon progress each year in their Employment Actions Plans.

The main goals of the European Employment Strategy are:

- To achieve a high level of employment in the economy and for all groups in the labour market
- To move away from a passive fight against unemployment towards promoting sustained employability and job creation
- To favour a new approach to work organisation in such a way that EU firms are able to cope with economic change while reconciling both security and adaptability, and allowing individuals to participate in lifelong training
- To provide equal opportunities for everyone in the labour market to participate and have access to work.

The national policy context for operations in the field of labour market and employment is defined by National Programme of Development of Labour Market and Employment up to 2006. Under this Programme, the Guidelines of Active Labour Market Policy for 2002 and 2003 based on the guidelines for the European Employment Policy, and annual Active Employment Policy Programmes (ALMP) have been prepared. The Active Employment Policy Programme 2004 was prepared and followed by a National Action Plan 2004. With the listed documents, annual objectives have been determined which should contribute to the realisation of the global long-term objectives by 2006 as set in the National Programme.

The social inclusion policy in Slovenia follows the strategic goal of sustainable improvement of the population's well being through a balanced economic, social and environmental development. Social inclusion is one of the clearly identified priorities of the governmental policy, which was confirmed by the adoption of the first National Programme on the Fight against Poverty and Social Exclusion in February 2000 and the First Report on the Strategy of Social Inclusion in April 2002. By the adoption of the latest the Government authorised Ministry of Labour, Family and Social Affairs to continue to monitor and co-ordinate the implementation of the Strategy.

National policy, EES, the Joint Assessment Paper (JAP), and the Joint Inclusion Memorandum (JIM) set the political framework for EQUAL.

3.2 The European Policy Context

3.2.1 European Employment Strategy, Joint Assessment Papers and Joint Inclusion Memorandum

JAP process and European Employment Strategy

JAP – Joint Assessment of Slovenia's employment and labour market policy priorities (July 2000) presents an agreed set of employment and labour market objectives necessary to advance the country's labour market transformation, to make progress in adapting the employment system so as to be able to implement the European Employment Strategy and to prepare it for accession to the European Union.

The JAP process is intended to be the basis for the Human Resources Development priorities defined in the National Development Plan of Slovenia. The employment strategy (National Programme of Labour Market Development and Employment until the year 2006) introduces a complete approach to decreasing unemployment and stimulating employment, which calls for active social partnership, which will be shown in the planning, execution and financing of the employment policy, formulated by the European Employment Strategy.

European Employment Strategy and Joint Inclusion Memorandum

Full participation in the open method of co-ordination on social inclusion is a high priority for the Government of the Republic of Slovenia. Following the common strategic goals and objectives of the European Union, set out in Lisbon, Nice and Stockholm, and regarding the most relevant aspects of the current situation in Slovenia, the general long-term approach is based on economic development and effective link between economic, employment and social policy.

In order to achieve the goals and main priorities of Slovenia in the area of social inclusion the following policy measures are envisaged:

- A wide range of active employment policy programmes for different disadvantaged groups, for long-term, unskilled, young, elderly unemployed, and specially persons with disabilities, Roma and other socially excluded (e.g. persons with mental health problems, addicts, ex-prisoners, etc);
- Measures for both reducing dropout from schools and enhancing lifelong learning by means of additional programmes for adults, co-financing, etc;
- Implementation of a health insurance reform incorporating more entitlements within compulsory insurance;
- Measures to increase the provisions of social and non-profit accommodation and to implement a new system of subsidizing rents for low income tenants;

- Put in place additional programmes and social services for the most vulnerable such as persons with disabilities, the Roma, the homeless and victims of violence, in the process of reintegration;
- Preventive measures, specially the e-inclusion activities, preventing the homeless and dropping out.

3.2.2 The Policy Frame of Reference

The Single Programming Document (SPD) represents the action plan of the Republic of Slovenia for the 2004-2006 period, and specifies how its strategic aims and objectives will be achieved. It is a joint programming document between Slovenia and the European Commission, since both partners will participate in its implementation and financing. Slovenia will concentrate the available resources from the Structural Funds, the Cohesion Fund, as well as other financial instruments and matched co-financing towards those operations aimed at addressing the most serious weaknesses hampering the socio-economic development of the country.

The SPD is based upon the Strategy of Economic Development of Slovenia and the National Development Plan (NDP), in which Slovenia elaborated its strategic goals through actual programmes, measures and projects, together with the necessary financial resources. Priority 2 of the SPD, “Knowledge, human resources development and employment”, will promote preventive and active measures to support active labour market policies, to support lifelong learning, to foster entrepreneurship, promote adaptability of the workforce and to facilitate social inclusion. Within the priority, equal opportunities, labour market aspects of information society and local employment initiatives – primarily those based on partnership- will be developed.

In this framework, EQUAL will provide a useful means to test ideas which can be mainstreamed to European Social Fund programmes and to help to address improve on the performance set out in the Slovenian National Development Plan.

As required by Article 9(c) of the Regulation 1260/1999, the Policy Frame of Reference for Employment and Human Resources Development in Slovenia (PFoR) is drawn up and attached to the SPD. The PFoR is based on the National Programme of Development of Labour Market and Employment up to 2006, the priority areas of Joint Assessment Paper (JAP), and key challenges of the Joint Inclusion Memorandum (JIM) , and puts the selected strategic priorities for Structural Funds’ support into the European Employment Strategy perspective.

The strategic priorities for the 2004-2006 period as indicated in the PFoR are based on the commitment to promoting employment and social cohesion within the challenge of the knowledge based society, and in particular, firstly, to promote necessary measures for job creation contributing to increase of employment and decrease of unemployment, and secondly, to promote the value of human resources by investing in human capital, and by fighting against all ways of discrimination in the labour market. The strategic priorities were

central to the choice of areas for support under the SPD and in particular in framing the priorities and measures as outlined in the Priority 2 of the SPD, “Knowledge, human resources development and employment”.

3.3 National policy overview

3.3.1 Labour Market and Employment

The National Programme of Development of the Labour Market and Employment up to 2006, adopted in November 2001, defines the following strategic goals for the implementation of employment policy:

- Raising the level of education and training of the active population,
- Reduction of structural discrepancies,
- Guaranteeing inclusion in active programmes of all young unemployed who have not found new employment within 6 months of becoming unemployed and for all other unemployed persons who have not found employment within 12 months of becoming unemployed,
- Reduction of regional discrepancies on the labour market,
- Growth in employment,
- Further development of social partnership in the area of addressing the problem of unemployment and increasing employment.

Under this Programme, the Guidelines of Active Labour Market Policy for 2002 and 2003 based on the guidelines for the European Employment Policy, and annual Active Employment Policy Programmes (ALMP) have been prepared. The ALMP have envisaged the inclusion of unemployed persons either in programmes leading directly to employment or to an educational or training programme, which significantly increases employment opportunities of more difficult-to-employ persons. The annual ALMP implemented during the period 2000-2003 have been characterised by a gradual change in the structure of the unemployed who have participated in the programme in such a way that they include primarily long-term unemployed persons without education, persons with disabilities, the young, older unemployed, that is those who according to the national legislation are defined as more difficult to employ persons.

Additional trends towards the achievement of greater effectiveness present changes regarding the inclusion of unemployed persons in the integrated and longer programmes with which they can attain a higher level of education and improve their possibilities of entering into regular employment. In addition to the changes in the structure of the unemployed included in the ALMP, the number of exits into employment has been increasing as well.

The effectiveness of the ALMP can be seen in the number and structure of unemployed persons. The number of registered unemployed persons as well as the unemployment rate has been gradually decreasing. The growth in employment as well as in the number of persons in

employment has been increasing. The inflow into unemployment has been decreasing, while outflows from unemployment are increasing. The structure of unemployed persons is gradually changing in a positive direction for almost all long-term objectives, with a decrease in the share of long-term unemployed persons and of those aged over 50, no significant change in the share of unemployed persons without vocational education and in the share of young unemployed. At the same time, the share of women among the unemployed is still increasing, which is above all a consequence of difficulties in the textile and footwear industries.

In spite of large range of ALMP programmes implemented, the labour market and employment situation in Slovenia still requires improvements in the policy mechanisms in order to achieve the global objectives as well as to streamline the national objectives with those adopted at the EU level. In particular, further efforts are needed in shifting from a passive to an active labour market policy. Within this context, special attention has to be paid to certain groups of people having difficulties in entering the labour market, notably women, young people, older workers, ex-prisoners, drugs and alcohol abusers and those discriminated on the basis of their sex orientation and asylum seekers and groups of people identified as those at risk of social exclusion. In addition, significant efforts are needed in the field of promoting entrepreneurship, creating new jobs, and increasing the education attainment level both among unemployed and low skilled employed persons.

3.3.2 *Social Inclusion*

The social inclusion policy in Slovenia follows the strategic goal of sustainable improvement of the population's well being through a balanced economic, social and environmental development. The contemporary policy of social inclusion was defined by the Government of the Republic of Slovenia in February 2000 within the *Programme to Combat Poverty and Social Exclusion*. In April 2002, the Government adopted the first report on Implementation of the Programme and specified guidelines for its further implementation. With the adoption of the Programme, the policy of social inclusion was defined as a government policy priority. The Government is thus fully committed to reduce the risk of poverty and social exclusion as well as to facilitate social inclusion of those already excluded or at risk of exclusion. The preparation of the *Joint Inclusion Memorandum (JIM)*, which was concluded in October 2003 and signed in December 2003, signifies a further step in framing the social inclusion policy context in Slovenia.

As a policy priority, social inclusion has been recognised a linking element of several government policies, and has been implemented through them. The most important single policy fields thus supporting the processes of social inclusion are:

- The policy promoting access to stable and quality employment through active labour market policy programmes;

- The programmes of social protection incorporating mechanisms for protection of the most vulnerable groups⁶ of population, both concerning benefits, various services as well as other forms of assistance;
- Education and training, in particular the policies reducing the drop-out rates and promoting the inclusion of adults in education through the lifelong learning strategy;
- The health care policy aimed at reducing differences in healthcare and the state of health of the population;
- The housing policy focused on increasing the provision of social and non-profit rented accommodation as well as stimulating the acquirement of the non-profit and social housing for the groups of people threatened by social exclusion; and
- E-inclusion programmes aimed at preventing the digital divide and information exclusion while providing for new opportunities for innovative forms of work and inclusion into the labour market for disadvantaged.

As demonstrated in the first implementation report on the Programme to Combat Poverty and Social Exclusion, a large number of measures have been adopted over the recent years making a significant contribution to reducing inequalities and promoting social cohesion. Yet, based on the analysis of the current situation and taking into account the fact that achieving objectives of social inclusion is continues process, which can only bring stable results in the long-term, mentioned policy measures in the area of social inclusion are necessary. The range of listed policy actions requires a coordinated operation of relevant national institutions and resources in the coming years. During the programming period 2004-2006, some of the actions, notably those related to the employment aspects of social inclusion are planned to benefit from the financial support of the Structural Funds.

3.3.3 Gender mainstreaming

The policy context under which gender mainstreaming policy is carried out in Slovenia is framed by a range of legal provisions and institutional arrangements. The basic legal framework is set by the Act on Equal Opportunities for Women and Men, the Labour Relations Act and the Parental Protection and Family Benefits Act. The role of the Equal Opportunities Office and the Equal Opportunities Ombudsman in dealing with discrimination or unequal treatment is of particular importance for the effective implementation of the legal provisions (see also 2.3.2).

Slovenia has thus determined the bases for improving the position of women and creating equal opportunities for women and men in political, economic, social, educational and other areas. Within this context a National Programme for Equal Opportunities for Women and Men is being prepared by a working group consisting of representatives of ministries, the

⁶ According to the JIM, the vulnerable groups include in particular the disabled, the homeless, Roma, and people with low income. In addition, other groups with special needs and/or difficulties in entering the labour market are the victims of violence, people with mental health problems, addicts, and persons in post-penal treatment, and people without a work permit.

Equal Opportunities Office, local communities, social partners, NGOs and other organisations of civil society and individual experts.

In spite of the well-established legal provisions and institutional arrangements, disparities between women and men still exist and may become even wider. Among them are notably the gaps between genders in the activity and employment rates, the female unemployment rate in relation to the one of men, persistent gender segregation and over-representation of women in some, and under-representation in other occupations and sectors (for data see 2.3.2). Because of this, further efforts and systematic action through the gender mainstreaming approach is required, which is also the approach adopted in the CIP.

4 STRATEGY FOR IMPLEMENTING EQUAL IN SLOVENIA

4.1 Overall approach

The Slovene strategy for implementing EQUAL is based upon and makes an important part of the country's overall strategy for employment and human resource development (HRD) during the programming period 2004-2006. Informed by the JAP and JIM processes, and founded on the National Programme of Development of Labour Market and Employment up to 2006, the Slovene employment and HRD strategy aims at supporting the implementation of the Single Programming Document 2004-2006 for Slovenia (SPD). As defined in the Policy Frame of Reference which makes a constituent part of the SPD, the strategic priorities of the Slovene Government for Structural Funds support for human resources are to promote employment and social cohesion within the knowledge based-based society, and in particular to:

1. Promote measures for job creation contributing to a reduction in unemployment and increase in employment, so as to ensure more and better jobs as well as a skilled labour force to match the vacant jobs.
2. Promote the value of human resources by:
 - Investing in human capital and providing the human resources with the qualifications required
 - Fighting against all ways of discrimination in the labour market in order to achieve the prosperity of all people living in Slovenia, including those exposed to social exclusion.

The strategy is based on the strategic priorities for human resources and employment development in Slovenia during the programming period 2004-2006 which will be supported both by national sources, for the most part through active labour market policy programmes (ALMP), as well as by Structural Funds.

In this context, EQUAL is expected to contribute to developing a comprehensive and coordinated overall employment strategy, according to the guidelines for the employment policies of the European Union Member States, and to play a role in human resource development in its own unique way, i.e. **by searching for new methods of fight against discrimination and inequalities in the labour market in order to achieve the prosperity of all people living in Slovenia, and thus to promote the value of human resources.**

Within this headline strategic approach, the principal targets of the EQUAL CIP are to search for new methods of fight against discrimination and inequalities, in particular for:

- **Possibilities for inclusion of disadvantaged groups into mainstream organisations' provisions and services;** Apart from structural problems in registered unemployment and the low employment rate of older workers, especially

among older women, which could be stressed out as the two most outstanding issues of the Slovene labour market, the analysis in preceding chapters pointed out some weaknesses resulting in disadvantages and inequalities of certain groups of people. Above all, the low educational attainment of the unemployed, particularly among disadvantaged groups, low level of functional literacy, underdeveloped practice of lifelong learning, specific problems of individuals from vulnerable groups (drug and alcohol abuse, homelessness etc.) call for the development of new strategies which, if proofed effective, could be pursued by mainstream organisations to secure the inclusion of these groups, and either improve their employability or increase their participation in lifelong learning activities. In the context of existing national policies and programmes aimed at improving the labour market position of the disadvantaged groups, there is still a need for, among others, development of new integrated training programmes and solutions, above all those following the pathway to employment approach, of new methods to identifying employment opportunities, as well as of adapted learning programmes for the low skilled and elderly persons. The disadvantaged groups identified as the most vulnerable in the labour market, including the asylum seekers, which are for different reasons neglected by existing programmes, fall under this target.

- **New and effective policies and practices for tackling problems faced by disadvantaged groups;** The analysis of the labour market and the description of the existing programmes and policies showed that, for the most part, those programmes have proven to be effective. The increase in outflows from unemployment, the gradually decrease of the unemployment rate etc. can be seen also as a result of active labour market policy programmes. However, it has been recognised that the labour market situation still requires improvements in policy mechanisms in order to achieve its global objectives. This target is therefore aimed at finding such new policy mechanisms; in particular those for tackling problems faced by disadvantaged groups that could be incorporated into existing policies and practices. Examples of those could be found in the areas where training and employment programmes exist (such as for disabled persons) yet persistent disadvantages and inequalities are still present, e.g. in high disability rates among older persons, high dropout rate, low participation rate in lifelong learning, or in gender employment and pay gaps as well as substantially lower number of women, as compared to men, in leading positions in companies.
- **Innovation which could be incorporated into policies and practices so as to secure wider coverage of disadvantaged groups, policies, sectors or geographic areas than the existing ones.** This target should be followed to focus on areas that need innovative work to remedy some of the weaknesses in the labour market. In particular, low employment rates of older workers against the total employment rate (15-64) which is slightly below the EU-15 average, long periods of absence from work (i.e. longer periods of rehabilitation, periods spent in prison, periods of homelessness), apathy and low motivation for job search, attributed stigma and distrust of employers, under and/or over representation of men and women in certain sectors etc. are among factors which require special attention. Innovative policies and practices will often require motivation and awareness raising activities accompanying, for example, adapted training or learning programmes in order to overcome labour, training and education barriers faced by disadvantaged groups.

EQUAL is therefore intended to use experience from implementing the ALMP and PHARE programmes in Slovenia to enable methods, especially new methods, for combating discrimination and inequalities in relation to the labour market to be developed and tested and the lessons learned, i.e. the added value of the Community Initiative, to be disseminated and put into good use in Slovenia and in other Member States. The Programme thus builds on previous experience of Slovenia and abroad, which adds to the probability of its success.

In respect of strategy and the listed targets, EQUAL is focused to a quite different approach from the ESF programme under the Objective 1 SPD:

- EQUAL tackles the roots of discrimination, inequality and exclusion
- EQUAL addresses the needs of most disadvantaged in connection with the labour market, either unemployed, in-active or employed, by seeking for innovative means and instruments and benefiting from transnational cooperation
- EQUAL is designed to influence local and national policies and structures by transferring innovations in the relevant systems, thus the mainstreaming, dissemination of innovation, and generalisation of innovation following the principle of empowerment constitute central elements of the EQUAL strategy.

The above strategic approach and targets will be translated into thematic fields, objectives and activities following four central lines of action:

- Improving employability and creating conditions for employment of the most vulnerable persons in the labour market
- Promoting lifelong learning as a means to combat discrimination and inequality in the labour market
- Strengthening equal opportunity policies for men and women and tackling gender segregation
- Facilitating the integration of asylum seekers.

Taking into account the labour market situation in Slovenia, in particular the aspects revealing the discrimination, inequalities or other situations preventing individuals from participating in an inclusive labour market, the listed central lines of action will support the implementation of the EQUAL strategy in Slovenia. Among them, the first three lines of action will by far predominate within the context of EQUAL activities.

4.2 The EQUAL Initiative and its six Principles

4.2.1 Thematic Approach

The EQUAL Initiative adopts a **thematic approach** linked to the 9 themes in which Member States consider that transnational cooperation could assist them to improve delivery of their national employment and social inclusion policies. The focus on specific themes will facilitate networking, benchmarking, validation, transfer and mainstreaming of results.

4.2.2 Innovation

EQUAL has been designed to test, develop and validate **innovative approaches** to policy development and delivery at local, national and European levels, and to integrate validated good practice into policy and actions, including the transfer of solutions, methodologies or approaches from elsewhere which increase the effectiveness of policy delivery. Innovation could mean new (in the national context), a new combination of existing elements, or significantly changed ways and means of doing things.

4.2.3 Partnership

EQUAL aims at translating the European Employment Strategy into action at the local and regional levels (e.g. in urban and rural districts), and at specific problem areas, cutting across regions. EQUAL will co-finance activities implemented by partnerships testing and validating new approaches. These Development Partnerships

- will bring together, at the earliest stages of strategy design and development, all interested actors to develop an integrated approach to problems, working together to identify the causes of problems, pooling efforts and resources, and pursuing innovative solutions to common problems;
- will base their work on a coherent **strategy** defining the common view on the nature and causes of discrimination and exclusion, the barriers to be overcome, the common visions and goals, the contributions from each of the partners, and the methodology for monitoring and assessment of the activities carried out;
- will be **inclusive**, ensuring that all relevant actors, both large and small, are included such as: public authorities, the public employment service, NGOs, the business sector (especially SMEs), and the social partners. Local and/or regional authorities should be included to ensure coherence between the planned activities and the development needs of the territory;

4.2.4 Empowerment

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.

4.2.5 Mainstreaming

The EQUAL Initiative aims to influence and change the delivery of local, national, and even European employment-related policies through the **dissemination** of innovative solutions and organised transfer to policy makers and key stakeholders (mainstreaming). This process includes identifying lessons, clarifying the innovative element and approach that produced the results, their dissemination, validation and transfer. More specifically, mainstreaming also defines the phase of transfer and the way in which other actors take account of the results, approaches and key elements elaborated by one or more DPs. To ensure maximum impact, Member States will establish effective mechanisms to assess and compare the results of any DP, and to disseminate good practice, at all levels within Member States of the European Union.

4.2.6 Transnationality

Transnationality is an essential element in the EQUAL Initiative for promoting the transfer of know-how and good practice between partnerships and between Member States. By sharing the results of innovative actions carried out by the DPs at national level, transnational cooperation will provide real *value-added for policy development* at the national and European levels. Accordingly, the EQUAL Initiative has been structured to specifically foster and promote effective transnational cooperation and partnerships.

As a consequence, under EQUAL, transnational co-operation will be organised at three levels:

1. Between Development Partnerships:

Transnational cooperation will bind together DPs from several Member States. To achieve results, transnational co-operation requires sharing a common view to tackling specific problems, developing similar and/or complementary strategies, approaches and objectives, and agreeing on priorities for joint action.

2. Between national thematic networks of Development Partnerships

The DPs will validate, disseminate and mainstream their experience and results not only through thematic networks at national level, but also at European level. Working platforms for this level of co-operation will be co-ordinated by the European Commission, in order to facilitate:

- thematic reviews of the strategic approaches and the results achieved;
- identification of good practice, to be reflected in the NAP Employment and the NAP Inclusion processes,
- dissemination of good practice solutions into Europe-wide discussion forums.

3. Between the responsible National Authorities and key actors across the EU:

In the Community Initiative Programmes (CIPs), the responsible Management Authorities committed themselves to close collaboration, and to mutual learning. This will be done within the framework of working groups and meetings co-ordinated by the European Commission, and via direct co-operation between the Member States. In terms of the latter, other key actors at national level will be supported to participate.

4.3 Choice of themes

Bearing in mind the amount of financial contribution from ESF Slovenia will receive for EQUAL and the short programming period, the Slovenian CIP is limited on realisation of co-financed actions for 4 out of 9 priority themes, so that the concentration of actions, activities and efforts will be guaranteed and quality development partnerships developed. Technical assistance will be also part of the CIP. As a consequence, and acting within the above strategic approach, Slovenia chooses the following priority themes:

- **Theme 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.
- **Theme 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.
- **Theme 8** Reducing gender gaps and supporting job desegregation.
- **Theme 9:** Supporting the social and vocational integration of asylum seekers.

4.3.1 Theme 1: Facilitating access and return to the labour market (Employability)

Rationale

The theme 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” is very important for Slovenia for two reasons. First, Slovenia needs new and innovative actions in this field. The existing programmes for improving employability and creating conditions for employment (National Programme of Development of the Labour Market and Employment up to 2006, ALMP Programmes, Programmes of education and training, and others) gradually improve situation on the labour market in Slovenia, but new ideas and development of new partnerships are necessary in future. Secondly, a bigger emphasis should be put on disadvantaged groups that are for some reason neglected by policies and programmes especially in the domain of social exclusion connected with disability, addictions, delinquents or homelessness and other phenomena which concerns in-active, unemployed and hard-to-employ persons.

The labour market analysis (Chapter 2.3) shows that especially structure of unemployed is a problem. Specific problems of individuals due to their limited work abilities, low level of education and of functional literacy, long lasting absence from work, low motivation for job searching, stigma and often distrust of employers are factors which call for an integrated action so as to facilitate access and return to the labour market for the most disadvantaged groups of people. This action shall therefore follow the line of *improving employability and creating conditions for employment of the most vulnerable persons in the labour market*.

Above mentioned analysis also showed that the dropout from schools is decreasing but is still relatively high. Since every person dropping out from the education process before acquiring an appropriate vocation reduces his/hers prospects of finding employment, reducing (preventing young people from dropping out of school and bringing them back into learning) the dropout rate from secondary schools is still one of the key strategies in the fight against social exclusion. According to JIM one of the aims to be realised in the future policy is to complete the content up-dating of vocational and professional education mainly through the introduction of a certificate system. The certificate system is not envisaged as an alternative to the school system, but as its complement. It should enable access to certificates for all, irrespective of age or professional qualification, whereby the certificates are publicly recognised documents which prove professional qualification at a specific level of difficulty. It should cause a reduction in the number of unemployed who are without basic professional qualifications and among whom are precisely young dropouts. The other important reason for introducing the certificate system is to reduce the gap between knowledge and skills that can be obtained in the framework of the ordinary school system and those that employers need and seek. As such it also provides a chance to solve the problems of a large number of dropouts.

In the Slovene context, this theme will thus concentrate on improving employability and labour market integration, as well as on creating conditions for employment of disadvantaged

groups that already receive attention in the above mentioned programmes, in a way that new approaches will be stressed, and on disadvantaged groups identified as the most vulnerable in the labour market which are because of different reasons neglected by existing programmes.

Aims and Objectives

The aim is to:

- Increase the participation rate of the selected disadvantaged groups
- Reduce unemployment and
- Facilitate conditions for permanent integration into the labour market.

Activities

In the framework of this theme Slovenia will support development of the following possible activities:

- Development of new integrated motivation-guidance-labour market integration programmes and mechanisms and supported progression outcomes for those most marginalized on the labour market, taking into account their specific needs and mobilising different skills (reception, orientation and follow-through of pathways).
- Development of new training solutions and new support tools that consider the disadvantaged group's specific needs (training-integration methodologies; socialization programmes; curricular innovation; skills assessments/validation; the use of ICT adapted to different individuals...)
- Introduction of a certificate system, as a complement to the school system, which should enable access to certificates for all, irrespective of age or professional qualification
- Development of local and/or sectoral approaches to identifying employment opportunities and preparing the disadvantaged groups to avail of such opportunities.
- Mainstream specific skills training that accommodates the needs of those that are facing barriers due to discrimination and make possible to achieve outcomes in terms of access to employment.

While implementing the activities, special attention shall be devoted to motivation and awareness rising in order to overcome labour, training and education barriers.

Disadvantaged groups

Broad list of disadvantaged groups targeted by Theme 1 may include: disabled, young, Roma, as well as victims of violence, people with mental health problems, addicts and persons in post-penal treatment.

4.3.2 Theme 5: Promoting lifelong learning and inclusive work practices (Adaptability)

Rationale

The Theme 5 “Promoting lifelong learning and inclusive work practices to encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market” will contribute to further development of the two important processes with strategic goal to raise the education level of the active population and its level of skills. Lifelong learning and inclusive work practices are at the moment in Slovenia in their early stages of development.

The Priority 2 of SPD “Knowledge, human resources development and employment” devotes a lot of support to lifelong learning (modernisation and development of education and training programmes for adults, with special emphasis on ICT, distance learning and development). EQUAL programmes should therefore be designed to test new ways of improving the labour market integration and opportunities for socially marginalized through development of lifelong learning and inclusive work practices.

In the Slovene context, this theme will concentrate on adults, especially on older people with low skills and low level of qualification, people with low income, including individuals facing other disadvantages in relation to the labour market (people with mental health problems, etc.) in a form of adapted lifelong learning programmes. On the other hand also SMEs and managers will be included to promote dissemination and consolidation of lifelong education and training in SMEs as a culture.

Aims and Objectives

The activities supported under this theme will aim at:

- Increasing participation rate of the selected disadvantaged groups.
- Reducing unemployment rate.
- Facilitating permanent labour market integration.
- Promoting development of education and training systems in order to equip individuals with skills required by and in connection with the labour market.

Activities

In the framework of this theme Slovenia will support development of the following possible activities:

- Creating new education and training methods using ICT (e.g. training programmes aimed at specific disadvantaged groups by using e-learning, teleworking, distance learning)

- Awareness and motivation actions aimed at low qualified employees with difficult access to education in order to foster their desire to achieve higher qualification by further training
- Developing and offering adapted learning programmes (e.g. identifying learning needs of those with mental handicaps and behaviour problems)
- Awareness actions to promote lifelong learning especially among SMEs and managers. (e.g. dissemination and consolidation of lifelong education and training in SMEs as a culture as well as innovative application of new technologies in training and accreditation of vocational skills, especially in ICT).

While implementing the activities, special attention shall be devoted to motivation and awareness rising in order to overcome labour, training and education barriers.

Disadvantaged groups

Broad list of disadvantaged groups targeted by Theme 5 may include: older people with low skills and low level of qualification, people with low income, including individuals facing other disadvantages in relation to the labour market.

4.3.3 Theme 8: Reducing gender gaps and supporting job desegregation (Equal Opportunities)

Rationale

The Theme 8 tackles the problems with which women in Slovenia are faced. Women's participation on the labour market in Slovenia has traditionally been high. However, the gender employment gap is substantial and a wide gender pay gap exists, in particular if the higher educational achievement of women is taken into account. In general, women in Slovenia are over represented in low-pay jobs in the public administration, education, healthcare and social services, and under represented in industry and business. Following this, this Theme should address gender inequalities in the labour market, and contribute to *strengthening equal opportunity policies for men and women and tackling gender segregation.*

There is a range of legal provisions and institutional arrangements in Slovenia which determine the bases for improving the position of women and creating equal opportunities for women and men in political, economic, social, educational and other areas. In addition to the legal framework as set by the Act on Equal Opportunities for Women and Men, the Labour Relations Act and the Parental Protection and Family Benefits Act, role of the Equal Opportunities Office and the Equal Opportunities Ombudsman in dealing with discrimination or unequal treatment is of particular importance for the effective implementation of gender mainstreaming. Furthermore, a National Programme for Equal Opportunities for Women and

Men is being prepared by a working group consisting of representatives of ministries, the Equal Opportunities Office, local communities, social partners, NGOs and other organisations of civil society and individual experts.

In spite of the well-established legal provisions and institutional arrangements, disparities between women and men remain and may become even larger. Therefore, actions under this Theme of EQUAL are meant to complement the actions already carried out on national level. The complementarity is of particular importance with regard to the ESF measures under the Objective 1 SPD for Slovenia which promote equal opportunities between men and women mainly through a gender mainstreaming approach, with no special activities for women planned under the ESF policy field e) (Article 2(1)(e) of Regulation (EC) 1784/1999).

Aims and Objectives

The aim of this theme is to contribute to obtaining a more equal distribution of men and women in economically prosperous sectors, as well as within the job hierarchy.

Activities

In the framework of this theme Slovenia will support development of the following possible activities:

- a) Initiatives to combat discrimination in employment:
 - Foster women career progression particularly through access to lifelong learning as a key issue for ensuring professional knowledge updating
 - Active action plans to promote women access and participation in taking decisions processes, management positions and social negotiation within their jobs in order to empower them in the labour market framework.

- b) Initiatives to promote women participation in labour market:
 - Promote both men's and women's integration in sectors and occupations in which they are traditionally under represented, for example through women's presence in technical areas; models of validation of non formally acquired competences.
 - Work with attitudinal and cultural change towards women and ICT by for example feminising and adapting ICT, with priority to young women, older women, multiply disadvantaged women as appropriate).
 - Pilot ways of breaking down and overcoming stereotypes of "women's and men's work" and roles among parents, teachers, careers advisers, training providers and employers through education and awareness actions.

Disadvantaged groups

Broad list of disadvantaged groups targeted by Theme 5 may include: women; however, awareness raising activities should be targeted both at women and men.

4.3.4 Theme 9: Supporting the social and vocational integration of Asylum Seekers

Rationale

At the Tampere Special European Council in October 1999, the Member States renew their commitment to the principles of the 1951 Convention Relating to the Status of Refugees and the need to provide protection for those at risk of persecution. Member States are also committed to combating abuse of the asylum process in order to ensure that those genuinely in need of protection can be granted that protection as fast as possible. Common minimum standards for the reception of asylum seekers by Member States are laid down in Council Directive 2003/9/EC.

In the Slovene context, this theme will be focused on those whose application for asylum is under consideration. By this way, the policy and efforts of the competent authorities in Slovenia acting in the framework of the Slovene Asylum Act will be supplemented. Provisions will be made to channel the activities into the areas of labour market integration so as to avoid possibility of duplication of actions either with those under the national programmes or with potential operations of the European Refugee Fund (ERF) which was established in 2000 to support Member States in receiving and bearing the consequences of receiving refugees and displaced persons.

EQUAL activities aimed at supporting social and vocational integration of the beneficiaries under this theme would therefore accompany the Government actions, in particular the preventive actions and support to the NGOs active in the field, repressive measures against the traffickers, changes in the legal provisions, social and humanitarian assistance to the victims, and international co-operation within SP SEE, ICMPD, IOM and SECI.

Aims and Objectives

The aim of the theme is to develop employment-oriented training programmes for individuals seeking asylum in Slovenia so as to facilitate their social and vocational integration.

Activities

In the framework of this theme Slovenia will support development of the following possible activities aimed at asylum seekers that are waiting for the decision:

- Familiarisation with the culture and habits of Slovenia to ease the transition
- Language training and communication skills to aid integration, including basic literacy
- Customised training to help find suitable employment (e.g. ICT training, training aiming at acquiring technical language and skills which link up with the already existing knowledge and skills of the asylum seeker)
- Establish and implement learning paths for the beneficiaries aiming at the quicker integration on the Slovenian labour market
- Intensive coaching of the asylum seeker and promotion of contact with employers.

While implementing the activities, the DPs will be encouraged also to develop the capacity of the NGO sector in order to enable it to work effectively in partnership with the relevant authorities.

4.4 Horizontal issues

When implementing the Programme, the selected themes and activities a special consideration will be given to the three cross-cutting issues: (i) development of information society, (ii) promoting equal opportunities between men and women and (iii) supporting the victims of trafficking. The three cross-cutting and horizontal issues are expected to be reflected in all measures, during the whole life-time of the Programme, and shall be promoted as much as possible by all Development Partnerships.

4.4.1 *Information society*

The use of information society services and of information and communication technologies (ICT) is expected to be fostered under this Programme whenever possible and appropriate. The ICT should be used as tool and training equipment, or training in the field of ICT should support and complement other activities aimed at improving the labour market position of the disadvantaged groups. In particular, the benefits of ICT services are expected to contribute to the mainstreaming, networking and dissemination activities under the Programme.

4.4.2 *Promoting equal opportunities between men and women*

Gender mainstreaming is a tool which will be applied in the Slovene 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 Slovene 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. 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.

Therefore, the promotion of equal opportunities between men and women will be systematically taken into account during the programming phase, as well as during implementation, monitoring, evaluation and reporting. This gender mainstreaming approach is reflected in the EQUAL CIP, in particular, in the special Theme 8 aimed at tackling gender gaps and supporting job desegregation, as well as through a gender mainstreaming approach within all other themes. Gender mainstreaming approach will also be included in the DP selection criteria. This approach shall result in:

- at least 40% of either gender included in all selected DPs (except for the Theme 8 which is primarily targeted at women)
- gender perspective being applied in the definition and planning of work programmes and activities, during the implementation, as well as in the dissemination and mainstreaming strategies and activities.

During the reporting, monitoring and evaluation processes, care should be taken that all relevant data provide male/female breakdowns of targeted and included persons whenever relevant. The Monitoring Committee, the National Thematic Network Groups, and other supporting structures to EQUAL will aim at ensuring gender balance amongst their members as much as possible.

The issue of equality between men and women needs to be continuously addressed and assessed, whether in terms of access to the job opportunities or opportunities within employment. The ultimate objective is to ensure that all policies are gender proofed. The Slovene active labour market policy programmes as well as the Objective 1 SPD measures have developed processes for gender mainstreaming which operate within the overall national equal opportunities policy framework (see Chapter 3.3.3). However, the gender

mainstreaming issues are of long-term concern and could benefit from innovative ways of addressing different aspects, such as gender pay gaps, sectoral segregation or gender employment rate gaps. EQUAL contribution to reaching the above objective shall be, in particular, in searching for innovative ways of tackling the gender gaps and segregation issues.

4.4.3 *Victims of trafficking*

The issue of human trafficking is of particular importance. The policy efforts covering it would thus complement the Government activities, including those implemented by the Inter-Ministerial Working Group⁷ for fight against human trafficking as well as the efforts within the Stability Pact for South and Eastern Europe (SP SEE).

At the Tampere Social European Council Member States also called for actions against human trafficking. Furthermore, the Council invited Commission and Member States⁸ to use the financial resources of the initiative EQUAL to promote, in accordance with national law, the social and vocational integration of its beneficiaries. This approach follows the orientation to addressing the emerging challenges recognised by the EQUAL Communication⁹, as well as the national efforts in preventing and combating these phenomena. Although there is no official data on trafficking with humans in Slovenia, the NGOs working in the field estimate that only numbers of victims of women trafficking in Slovenia reach 1,500-3,000¹⁰ persons annually. Similarly, the US State Department report on human trafficking of July 2003 placed Slovenia among the countries which did not meet all the standards yet but has made significant efforts in this direction, including punishing the traffickers and making serious efforts to eliminate the problem.

4.5 **Evaluation of the expected impact**

The overall objective of the CIP is to develop innovative labour market policies *by searching for new methods of fight against discrimination in the labour market in order to achieve the prosperity of all people living in Slovenia, and thus to promote the value of human resources.*

⁷ In December 2003, the Government established an Inter-Ministerial Working Group charred by a National Coordinator, and asked it to prepare, by June 2004, an Action Plan for fight against trafficking in humans, to monitor the implementation of the Action plan, and to report to the Government. The Working Group is composed of representatives coming from government ministries, including MoLFSA, and offices, international organisations, such us UNHCR, and NGOs.

⁸ Council Resolution on initiatives to combat trafficking in human beings, in particular women (20 October 2003)

⁹ Communication from the Commission to the Council, the European Parliament, the 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 ideas”

¹⁰ Data from the ACTIVA VITA Association Convention on elimination of all forms of women discrimination, May 2003.

It is expected that the Programme will contribute to identification and overcoming the difficulties experienced by disadvantaged groups and individuals in the Slovene labour market.

Additionally, it is expected that the CIP will contribute to the achievement of the strategic goals for the labour market and employment development in Slovenia up to 2006, as well as to the goals for the social inclusion process (see 3.2). This shall be done in particular by:

- Tackling the roots of discrimination, inequality and exclusion in Slovenia,
- Addressing the needs of most disadvantaged in connection with the labour market, either unemployed, in-active or employed, by seeking for innovative means and instruments and benefiting from transnational cooperation
- Influencing local and national policies and structures by transferring innovations in the relevant systems through mainstreaming, dissemination of innovation, and socialisation of innovation following the principle of empowerment

With regard to the groups of people targeted by the CIP activities, the following shall be achieved by the end of the Programme duration:

- Under Theme 1 and 5, the participation of the disadvantaged groups shall be increased as a result of the development of new integrated motivation-guidance-labour market integration programmes, training solutions and support tools, new training methods, as well as motivation and awareness raising activities; this shall be achieved by addressing the needs of the disadvantaged groups, searching for new instruments and mainstreaming the results into the policies.
- Under the Theme 8, national and transnational co-operation should contribute to tackling gender segregation and gender employment/unemployment gaps by searching for innovative methods of combating inequalities in employment and promoting women's participation in the labour market. In particular, results to be mainstreamed shall be directed towards a more equal representation of men and women in economically prosperous sectors, as well as within the job hierarchy.
- Under the Theme 9, number of employment-oriented training programmes, as well as other programmes supporting social and vocational integration of individuals seeking asylum in Slovenia shall be developed.

And finally, when implementing the Programme, all development partnerships must take account of three horizontal objectives that shall be common to all the four thematic fields described above:

- The use of information and communication technologies shall contribute to obtaining the information society
- Promotion of equal opportunities between men and women shall be integrated in all activities; this way the existing gender gaps in the labour market shall be reduced
- Additionally, the problem of human trafficking may be treated under all the themes.

The listed objectives and expected impact from this Programme are rather of a qualitative nature and thus extremely difficult to be set as quantitative targets. Due to this, the objectives are not to be understood as targets but rather a tendency progress to which should be closely monitored during the implementation process. A baseline to this tendency can be set in the following context indicators (see also data in Chapter 2):

Context indicator	Baseline (date)	Source
Human development index	0.879 rank 29 (173) (2000)	UNDP
GDP per capita in PPS (EU15 = 100)	70% (2001)	Eurostat
Employment (SNA) growth	-0.5 (2002)	SORS
Employment rate (15-64)	63.4% (2002)	SORS
Unemployment (ILO)	6.4% (2002)	SORS
Gender employment rate gap (15-64) (male / female)	0.9% (2002)	SORS

4.6 Quantification of objectives and measures of performance

According to the EQUAL Guidelines, specific objectives of the Programme in respect of each of the chosen themes should be given and quantified where possible. In addition, the Commission guidelines¹¹ require an appropriate and effective system of indicators of programme performance. It should be noted that both exercises, quantification of objectives and targets as well as establishing a system of indicators are notoriously difficult for various reasons, such as:

- Lack of official, reliable and validated baseline data concerning many of the disadvantaged groups under the Programme which makes it extremely difficult to set a target and, in turn even more difficult to develop indicators to measure the efficiency and effectiveness of the Programme.
- Prior to the selection of the DPs, quantification of a baseline situation and of forecasts could be prone to wide variations.
- Lack of experience with EQUAL-type of activities as well as of monitoring and evaluation culture in Slovenia.

Nevertheless, a certain minimum of input and output information is required to provide a picture of the “volume” of activities funded by EQUAL in Slovenia. The list of indicators building on the common minimum outlined in the EC guidelines will be provided in the programming complement.

¹¹ Guidelines for systems of monitoring and evaluation for the Human Resources Initiative EQUAL in the period 2000-2006

4.7 Financial allocation

In accordance with the labour market analysis, and in the most part, the analysis in terms of discrimination and inequalities, the Theme “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” is by far the most heavily funded theme, being allocated some 60% of the total funds.

In the Theme “Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection to the labour market” is designed to test new ways of improving the labour market integration and opportunities for socially marginalised. The theme complements the existing national policies in which strategic goal is to raise the education level of the active population and its level of skills, as well as those planned to be supported under the SPD (modernisation and development of education and training programmes for adults, with special emphasis on ICT, distance learning and development of certificate systems), and is therefore allocated 15% of available funds.

The Theme “Reducing gender gaps and supporting job desegregation” is intended to test various ways of reducing disadvantages faced by women in employment. Although increasing in the last decade, the gaps between men and women in the labour market are not assessed to be the major problem. However, if not stopped and the tendency reversed, inequality between the genders might become an issue. Further to this, the thematic field is allocated 15% of the total funds.

The Theme “Social and professional integration of Asylum Seekers designed to see how the position of individuals seeking asylum in Slovenia can be improved in the labour market, is allocated 2% of the funds.

5 ACTIONS UNDER EQUAL

According to EQUAL Guidelines, EQUAL in Slovenia will fund activities under the following four actions:

- Setting up Development Partnerships and transnational co-operation (**Action 1**)
- Implementing the work programmes of DP (**Action 2**)
- Thematic networking, dissemination of good practices and making an impact on national policy (**Action 3**)
- Technical Assistance Measures to support all the actions.

Thematic networking and mainstreaming is expected to start either at the earliest point that results of Slovene DPs are available to disseminate, or can run in parallel to the other actions.

Slovene DPs (acting either singly or in groups), or ad hoc consortia of Development Partnership partners, multipliers and experts can be selected to carry out activities for assessing, presenting and promoting the evidence for good practice at national or European level, e.g. working with good practice from the 1st round of EQUAL.

5.1 Setting up DPs and Transnational co-operation (Action 1)

The objective of Action 1 is to facilitate the creation or the consolidation of durable, effective Development Partnerships (DPs) and to ensure that transnational co-operation will have a real added value.

There will be a single selection procedure for funding based on a public call for Proposals. Selection of DPs for EQUAL will be based upon an application submitted jointly by a number of organisations (DP initiators), in the context of the thematic field and territory of operation. The application should identify:

- The partners to be involved in the DP at the outset; the arrangements for ensuring that all relevant partners 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.
- The rationale for the partnership and why there is a request for funding under EQUAL.
- The objectives of 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.
- A detailed work plan, methodology and management tools for developing and finalising the Development Partnership Agreement, accompanied by a realistic budget.

- An outline of the activities foreseen for developing and testing the innovative approach for the entire period, including an indicative budget (estimate); The expectations for the transnational co-operation.

The procedures for selecting Development Partnerships fall within the competence of the Managing Authority. The selection criteria will reflect the general principles of EQUAL and the Managing Authority will ensure that there is no conflict of interest in the selection procedure.

DPs selected for participating in EQUAL will be informed via an official notification by the EQUAL CIP MA, specifying the budget for Action 1 and time period available for this Action 1, which will never last more than 6 months since the official notification date. Cost will be eligible from the date of notification of selection to the selected DPs. Unsuccessful applicants will be given reasons for their non-selection and will be informed of the appeal.

Transnational Co-operation

DPs must identify at least one partner from another Member State. As a general rule, co-operation should be established between DPs selected by the Member States under EQUAL, and preferably those working in the same thematic field; such as co-operation may also extend to similar projects supported in a non Member State eligible for funding under Phare, Tacis, Meda and Cards programmes. In exceptional cases a DP could co-operate with partners outside EQUAL subject to the condition to the potential value added of this co-operation, and to the capacity of these partners to demonstrate to be able to cover their own costs incurred by this co-operation.

Setting up Development Partnerships and transnational co-operation (Action 1) will be considered completed when DP would be able to achieve the first milestone which requires DPs to present to the EQUAL CIP MA a common strategy based on the Development Partnership Agreement (DPA) including the Transnational Co-operation Agreement (TCA)

DPA should contain:

- An assessment of current labour market exclusion, discrimination and inequality, within the thematic field and territory/sector concerned
- Objectives and priorities for action, reflecting the learning from previous relevant action in the territory/sector
- A detailed work programme accompanied by a realistic budget
- A clear identification of the role of each partner, including the arrangements for steering and managing the partnership and administrating the financial report
- A mechanism for on-going assessment including the presentation of data and information on the DP and the analysis of results
- The commitment of the DP to collaborate on Action 3
- Its strategy and mechanisms for implementing a gender mainstreaming approach

- 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 mainstreaming activities at national and European levels
- Transnational Co-operation Agreement (TCA).

TCA should contain:

- A transnational work programme accompanied by a budget
- The contribution and role of each transnational partner, the common methods of decision making and the organisational arrangements for implementing the common work programme
- The added value of the transnational activities
- The methodologies for monitoring and assessment of joint activities.

This Transnational Co-operation Agreement must be presented on the basis of the common format described in the Guide on Transnationality, 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.

In order to have selection confirmed and to receive funding to implement its work programme through Action 2, the Development Partnership Agreement including the Transnational Co-operation Agreement, must also demonstrate that the DP fulfils the following conditions:

- Financial viability: the availability of the necessary co-financing.
- 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 mainstreaming activities at both national and European level.

The Managing Authority should provide sufficient support to enable Development Partnerships to conclude their draft Development Partnership Agreement as quickly as possible. Failure to submit a draft Development Partnership Agreement will lead to de-selection, after which expenditure will no longer be eligible.

Upon receipt of the draft Development Partnership Agreement, the 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).

5.2 Implementation of the work programmes of DPs (Action 2)

Action 2 is the key stage of implementation and delivery for DPs. If the conditions explained above are fulfilled, the MA will confirm the initial selection of the Partnership, and notify it, within a period of maximum 8 weeks upon submission of the DPA, including the multi-annual budget available to implement its work programme.

This work programme will cover a period of maximum 30 months from the date of the official notification for Action 2. However, if the results obtained justify an extension, a further grant could be approved, along with an extension of the period of financing for the DP.

DPs are expected to deliver their national and transnational work programmes, which may include:

- Testing new approaches to deliver labour market and social inclusion policies
- Conducting studies and analysis of labour market discrimination and inequality.
- Raising awareness about the causes and effects of discrimination.
- Preparing information and publicity.
- Designing and developing materials, courses, training and other employment aids.
- Offering work placements.
- Delivering guidance, counselling and training.
- Creating and sustaining jobs and
- Improving employment services.

The official notification will also include the date of the eligibility for this period.

Allocation designated to transnational activities will not be less than 10% of Action 2 budget.

5.3 Thematic networking, dissemination of good practice and making an impact on national policy (Action 3)

Action 3 aims to inform, influence and change labour market policy and practice (mainstreaming). This impact is achieved through networking (bringing people together), dissemination (spreading of information to individuals and organisations) and mainstreaming activities within EQUAL. Participation in this Action will be mandatory for all DPs in order to ensure the mainstreaming impact that EQUAL seeks.

Action 3 is expected to start either at the earliest point that results of Slovene DPs are available to disseminate, or can run in parallel to the other actions.

Slovene DPs (acting either singly or in groups), or ad hoc consortia of Development Partnership partners, multipliers and experts can be selected to carry out activities for assessing, presenting and promoting the evidence for good practice at national or European level, e.g. working with good practice from the 1st round of EQUAL.

Mainstreaming activities on the national level shall:

- identify the factors leading to inequality and discrimination in the workplace and in accessing labour market opportunities
- monitor and analyse the impact or potential impact of the Development Partnerships on the policy priorities set out in the NAP and on the different groups subject to discrimination and inequality in connection with the labour market
- identify and assess the factors leading to good practice and benchmarking their performance; and
- disseminate good practices (both horizontally and vertically).

The Communication describes mainstreaming as “the integration and incorporation of new ideas and approaches into policy”. The guidelines state that while EQUAL provides the structures and tools to facilitate mainstreaming, it is the responsibility of each Development Partnership, Member State and the Commission to mainstream new approaches piloted and developed through EQUAL in both 1st and 2nd rounds.

Development Partnerships validate, disseminate and share their experience and results both within the framework of national thematic networks and at European level through the European Thematic Groups. Co-operation at national and European level supports:

- thematic reviews of the strategic approaches and the results achieved;
- identification of good practice, particularly relevant to the Employment Strategy and Social Inclusion Process;
- dissemination of good practice solutions into Europe-wide discussion fora.

The transnational dimension of EQUAL should also provide scope for mainstreaming new policy approaches / good practices. It is likely that in many instances, good practices from other countries will be transferable in the Slovenian context although these will need to be tailored and adapted to national, regional and local circumstances and needs.

Since Slovenia has a relatively low budget for implementation of EQUAL, it is expected that the number of DPs will be small (from 6 to 10). The MA will support setting-up of DPs including partners that can contribute to both horizontal (between similar types of organisations or organisations working on a shared problem) and vertical (at the local, regional, national and European level) mainstreaming.

Furthermore, in order to enhance mainstreaming of innovations, and upon receipt of a proposal from a DP, the MA may fund additional activities by DP acting either singly or in groups on the basis of their specific expertise and proven capacity, or in ad hoc consortia of DP partners, multipliers and experts. Activities at national or European level presenting and promoting the evidence of good practice may include:

- Validation of the innovation;
- Benchmarking innovation against existing approaches nationally and in other Member states;
- Dissemination of the innovation to additional actors concerned with the discrimination tackled;
- Demonstration and transfer of good practice including mentoring;
- Integration of experience and lessons learnt from outside EQUAL.

The MA will also fund additional mainstreaming activities by DPs as part of the collaboration within the European thematic groups.

Mainstreaming Strategy

The EQUAL Monitoring Committee will agree on a strategy for mainstreaming at both the horizontal level (the level of organizations active in the same or a similar field) and the vertical level (the level of regional and national policy), which will become part of the Programming Complement. This strategy will outline the objectives, mechanisms and resources for validating and benchmarking results and for transferring them into policy and practice. The mainstreaming strategy should build on the experiences made in other Member States, and results of the ex-ante evaluation. Thus, it shall be composed of the following elements:

- Objectives of the mainstreaming activities which should be in line with the general Communication approach towards incorporating, integrating and applying results either to bodies active in the same or similar fields or to those active at the regional or national levels, including in the social and employment policies or within mainstream ESF programmes.
- Mechanisms which should be put in place for mainstreaming promising innovations or successful practices, including thematic networks and discussion forums that should be established on co-operation and partnership principles and should always comprise relevant Government ministries and offices, in addition to other stakeholders.
- Basic elements the mainstreaming mechanisms should look for in DP's good practice, in particular: i) possibilities for inclusion wherever DPs targeting specific disadvantaged groups identify strategies that can be taken aboard by mainstream organisations and included in their regular services; ii) new and effective policies and practices for tackling problems faced by disadvantaged groups that could be incorporated into policies and practices of mainstream organisations, and iii) all innovation where implemented activities could be extended so as to reach more

disadvantaged groups, other policies, sectors or geographic areas than the initial DP activity.

- Main resources to be used for mainstreaming, dissemination and transfer of good practices, including information and communication technologies to communicate and disseminate learning from DPs, and media as arenas of debate on issues emerging from DPs activity.

The National Support Structure will support the development, update and implementation of the mainstreaming strategy agreed by the Monitoring Committee.

Thematic Networking

Thematic networking is a critical success factor for new policy approaches and methodologies to be successfully mainstreamed into national social and employment policies. In line with the Commission's Guidelines on EQUAL, the Managing Authority will set up thematic networking groups at national level and will participate in European – level thematic networking groups.

5.4 Technical Assistance Measures

Technical Assistance supporting the implementation of the CIP will be used in order to provide professional services both to the MA and to the DPs. It is an important resource for effective delivery of the Programme, which requires adequate administration and support.

Technical assistance budget will be used particularly for preparation, management, implementation, monitoring, control and evaluation of the programme, and for information and publicity activities. The types of activities, which are in line with the Rule 11.2 and 11.3 of the Regulation 448/2004, are presented in detail in Table 5 of the Chapter 6.

In regard to Actions under EQUAL the Technical Assistance will also:

- Advise on and facilitate the consolidation of partnerships and the search for suitable transnational co-operation partners (Action 1);
- Collect, edit and disseminate the experience and results, including annual reports of the DPs (Action 2);
- Support the thematic networking, the horizontal dissemination activities and the setting up of mechanisms for the policy impact (Action 3);
- Guarantee co-operation in European networking and ensure the sharing of all relevant information with the other Member states and the Commission.

Technical Assistance will be used for any support needed in line with the Commission Regulations (EC) 1260/1999 and 448/2004. The activities to be supported will be clearly differentiated between Rule No 11.2 and 11.3.

Taking into account Commission guidelines on EQUAL and the above Regulations, the Technical Assistance activities will fall under two separate measures as follows:

Measure 1: EQUAL specific support actions and basic administrative and financial TA activities (Eligibility Rule No. 11.2)

Under this measure advice and support to the DPs regarding the principles and methodology of EQUAL will be provided, in particular thematic networking, co-operation at European level, partnership co-operation, and dissemination and mainstreaming.

TA will also be used in order to support management, implementation, monitoring and control of the Programme, in particular activities related to preparation, selection, appraisal and monitoring of operations, meetings of the Monitoring Committee, and audits and on-the-spot checks of operations.

Measure 2: Complementary TA activities (Eligibility Rule No. 11.3)

This measure will mainly cover support activities at the Programming level, and will include actions such as studies, seminars, information actions, evaluation, and the acquisition and installation of computerised monitoring and evaluation systems.

The overall budget for Technical Assistance will be 8% of the total contribution to the CIP. Within this ceiling, the amount available for activities under Measure 1 will not exceed 5% of the total allocation. The remaining funds in the amount of 3% of total funds will be used for actions under Measure 2.

More specific description of the activities under these two measures is provided in the chapter 6.4.1 Arrangements for Technical Assistance.

Part II: Implementing EQUAL

Sections 6 to 9 of the CIP describe the implementation systems for the EQUAL Programme.

Section 6 describes the roles of the various actors at national level, including management, payment and control structures, and technical assistance. It also describes the concept of the Development Partnership in the specific context of this programme, and provides detailed information on the manner of their selection.

Section 7 deals with the financial elements of the programme.

Section 8 describes the monitoring requirements, including the data that must be collected for monitoring and evaluation purposes.

Section 9 describes the requirement for evaluating the programme.

6 CIP IMPLEMENTATION

6.1 Managing Arrangements

6.1.1 *Managing Authority*

In accordance with Article 9(n) and Article 34 of the Council Regulation (EC) 1260/99, the overall and final responsibility for the implementation of EQUAL in Slovenia shall lie with the Ministry of Labour, Family and Social Affairs (MoLFSA) and within it with the Department for Labour Market, Employment and Education, headed by State Secretary. The EQUAL Managing Authority is located at the following address: Ministry of Labour, Family and Social Affairs, Kotnikova 5, 1000 Ljubljana, Slovenia; Tel: +386 1 478 33 57, Fax: +386 1 478 34 93.

As Managing Authority for the EQUAL CIP, the Ministry of Labour, Family and Social Affairs must, following the Art. 34 of the Council Regulation (EC) 1260/99, in particular:

- Develop and coordinate policy on the Initiative including the development of linkages, where appropriate, with other Community Initiatives and with the Single Programming Document of Slovenia
- Coordinate policy with other Government Ministries, Offices and Services in respect of the Initiative
- Draw up and submit the Programme Complement to the EQUAL Monitoring Committee
- Prepare the programme amendments and re-programme the financial plans according to the Article 34 of the Regulation 1260/99
- Liaison with the European Commission and the Member States on policy and progress, in particular, present the CIP to the Commission, forward data on the CIP implementation to the Commission, elaborate and submit to the Commission the annual and final reports, after approval by the EQUAL Monitoring Committee, organise the evaluation in cooperation with the Commission
- Chair and provide Secretariat for the EQUAL Monitoring Committee
- Set up a system to gather reliable financial and statistical information on the implementation for monitoring and evaluation activities
- Supply statistical and financial information to the Monitoring Committee on issues relevant to the operation of the Initiative
- Ensure an efficient system for internal financial control
- Ensure that all organisations involved in the management and implementation of EQUAL maintain a proper accounting system, make adequate provisions for financial reporting (monitoring) and sound financial management (control) and forward this data to the Managing Authority
- Arrange for certified and verified payment requests and progress reports to be submitted to the Commission in compliance with Community rules

- Assure compliance with Community policies in the context of the application of Community rules on the award of public contracts
- Assure complementarity of EQUAL with other programmes
- Promote actions of information and publicity, including notices and other modalities about submission of project proposals
- Issue rules and procedures to DP Promoters, National Support Structure and other relevant bodies and organisations, as necessary, in order to ensure compliance with, in particular, financial control in accordance with ESF and Structural Funds Regulations.
- Draft a mainstreaming strategy.

The Managing Authority will also:

- Assure adequate training for the National Support Structure (NSS) staff
- Assure participation of the NSS staff in the European level NSS-oriented activities
- Put in place the system for quality management.

The Ministry of Labour, Family and Social Affairs will be assisted in carrying out these management tasks by appropriate technical expertise as required using the Technical Assistance in the form of National Support Structure.

6.1.2 Control arrangements

Control will be carried out at different levels:

1. Verification of expenditure according to Article 4 (Commission Regulation (EC) No. 438/2001) will be performed by Control Unit – an independent body, established at the Ministry of Labour, Family and Social Affairs.

2. Certificates of expenditures according to Article 9 (Commission Regulation (EC) No. 438/2001) will be performed by the Paying Authority.

3. Within the Ministry of Finance an independent body, the Budget Supervision Office of the RS, is responsible for coordination, development and control of the public internal financial control system as well as for carrying out financial and performance audits.

4. In concordance with art. 10 of the Commission Regulation (EC) No. 438/2001, the Budget Supervision Office of the RS will be responsible for 5% sample checking of total eligible expenditure, in order to verify the effectiveness of the management and control systems in place by each of the Funds and to verify selectively, on the basis of risks analysis, expenditure declarations made at the various levels concerned. Thus it shall perform special audits in the case of incompliance/irregularities reported and shall propose measures for eliminating the irregularities.

5. The Budget Supervision Office of RS shall be responsible body to issue winding-up declarations on the assistance as stipulated in Chapter V of the Commission Regulation No 438/2001 amended by Regulation 2355/2002 regarding Management and Control Systems.

6.2 Monitoring Arrangements

6.2.1 Monitoring Committee

A Monitoring Committee will assist the Ministry of Labour, Family and Social Affairs in discharging its responsibilities. The primary responsibility of the Monitoring Committee is to ensure that ongoing implementation of the CIP is in line with the strategic plan for EQUAL.

The Monitoring Committee shall:

- Approve the Programme Complement and any ongoing adjustments
- Monitor the impact and implementation of the Initiative
- Review progress in achieving the specific objectives of the CIP
- Consider and approve the criteria for selecting DP to be financed
- Advise on appropriate communication and publicity strategies
- Consider and approve annual and final reports prior to submission to Commission
- Approve proposals to amend Commission decisions on Fund support
- Propose adjustments or review of Fund support to the Managing Authority and approve reprogramming decisions
- Approve the mainstreaming strategy and monitor it.
- Approve annual work plan of the National Support Structure
- Consider all relevant evaluation recommendations.

The Monitoring Committee shall establish its own Rules of Procedure, including any appropriate organisational arrangements. The Monitoring Committee will be provided with qualitative and quantitative reports on the operation of the Initiative at regular intervals. The Monitoring Committee will meet, as a rule, at least twice a year.

The Monitoring Committee will meet as soon as possible after the Commission decision on the contribution of the Funds (Article 35.1). Membership of the Monitoring Committee will comprise representatives from:

- Ministry of Labour, Family and Social Affairs
- Ministry of Finance
- Ministry of Education, Science and Sport
- Ministry of the Economy
- Ministry of Interior
- Ministry of Information Society

- Government Office for Structural Policy and Regional Development
- Equal Opportunities Office
- Social partners (employers' and employees' organisations)
- Local authorities and of regional interests (municipalities and regional development agencies)
- Non-Governmental Organisations, including those representing people who face discrimination and inequality in the labour market.
- European Commission in its advisory capacity.

Where feasible and appropriate, membership of the CIP Monitoring Committee will additionally contain representatives of implementing agencies and sectoral interests. Implementing agencies, such as the Employment Service of Slovenia, Centre for Vocational Education and Training, Social Work Centres, and umbrella NGOs, such as Centre of Non-Governmental Organisations of Slovenia, will be expected to take active part in the National Thematic Network Groups.

The Monitoring Committee will aim to have a gender balance amongst its members. The Managing Authority will provide the chairperson for the Monitoring Committee. The Managing Authority will also arrange for consultation in behalf of the Monitoring Committee, as appropriate and necessary, with regional authorities or local bodies.

Monitoring Committee members representing organisations participating in a Development Partnership should not be implicated in the selection process in order to avoid any conflict of interest.

6.3 Financial Arrangements

6.3.1 Paying Authority

In accordance with Articles 9(o) and 32 of the General Regulation on Structural Funds 1260/1999, the Slovene Ministry of Finance, EU Donations Department – National Fund acts as the Paying Authority for EQUAL in Slovenia. The Paying Authority acts under the responsibility of the State Secretary responsible for the Budget. Its office is located at the following address: Ministry of Finance, Beethovnova 11, 1000 Ljubljana, Slovenia; Tel: +386 1 478 6305, Fax: +386 1 478 6204.

According to the Article 9(o) and Article 32 of Council Regulation (EC) 1260/1999, the Paying Authority will be responsible for drawing up and submitting certified payment applications to, and receiving payments from the Commission. The Paying Authority shall in particular:

- Prepare application for payment and certificate and statement of expenditure in accordance with Article 9 of Commission Regulation 438/2001 as amended by Regulation 2355/2002 regarding Management and Control Systems
- Receive payments from the Commission (Articles 9 and 32 of Regulation 1260/1999)
- Ensure the execution of payments to the Development Partnerships promptly and full
- Repay payment on the account of the Commission in accordance with the Article 32 of Regulation 1260/1999
- Allocate an interest earned on ESF funds
- Recover the ESF funds in case of irregularities.

Following the provisions of Article 32 of Council Regulation (EC) No 1260/1999, payments by the Commission of the contribution from the ESF shall be made, in accordance with the corresponding budget commitments, to the Paying Authority in the Ministry of Finance. Payment may take the form of: payment on account, interim payments and payments of the final balance. In accordance with Article 32 payments are used to reimburse expenditure of Final Beneficiaries, i.e. Development Partnerships. In order to apply for interim payments, the Paying Authority will submit certified statements of expenditure to the Commission according to the Article 32(3). The final balance of the resources to be sent by the Commission after the final balance has been done according to the Article 32(4) shall be pre-funded by national resources.

As required by Article 32(7), the Paying Authority will send the Commission updated forecasts of applications for payment for the current year and the forecast for the following year, by 30 April each year.

The Paying Authority will establish a separate interest bearing account for ESF funds for the Community Initiative EQUAL. The payment on the account received from the Commission will be used to pay the Community contribution to expenditure relating to the assistance. Any interest earned will be allocated to the Fund.

All DPs will have appointed an organisation¹² which will administer the public funds. The Managing Authority (MA) will provide guidance and detailed description of the tasks of such an organisation. This organisation will aggregate all expenditures and verify their eligibility. It will submit statements of expenditure and payment claims to the National Support Structure (NSS) on a regular basis as specified in the grant letter.¹³

¹² If this organisation is not one of the DP partners, DP will have to select it by applying the public procurement rules.

¹³ Transfers from ESF and national co-financing will be managed by MA in such a way that each DP will send their payment claims without having to specify the source of the funds.

NSS receives and verifies the payment claims from DPs to which MA has awarded a contract in the form of a grant letter. All payment claims shall be backed up by invoices or other accounting documents. NSS recommends to MA the payment of the claims.

According to the recommendation of NSS, the MA authorises the payment and makes a payment order to the national budget – Accounting Department of Ministry of Finance. In line with the national pre-financing procedure (the whole programme is pre-financed from the national sources) the payment to DPs will be made from the national budget after the approval of payment order by the Ministry of finance – Accounting Department.

In the period of 30 days after the payment from the national budget to the DPs and following the Article 4 verification (according to Regulation 438/2001) of the payment claims, MA will prepare aggregated claims for reimbursement of expenditure supported by required supporting documents and submit them to the Paying Authority (PA).

PA¹⁴ checks the claims for reimbursement of expenditure and submits an application for payment to the Commission.

The Commission checks the application for payment and pays the corresponding ESF contribution to PA.

Upon authorisation of the claim and payment by the Commission to PA, PA executes the reimbursement from account opened at the National Bank of Slovenia to the budget line of the Ministry of Labour, Family and Social Affairs (MA).

Payments from the national budget to DPs will not be dependant on the reimbursement from the Commission. PA will ensure that DPs will receive payment in full (including the parts corresponding both to the ESF contribution and to the national public co-financing) and as quickly as possible.

The financial control arrangements will be set as described under 6.1.2 above.

¹⁴ The Paying Authority will make the conversion from the national currency to euro by applying the Commission regulation 643/2000.

6.4 Technical Assistance

6.4.1 Arrangements for Technical Assistance

Technical Assistance is necessary to assist the Managing Authority in implementing the CIP, and to provide assistance to the Development Partnerships. It is expected that the programme absorption capacity will improve as a result of activities carried out through technical assistance.

The Technical Assistance budget will be used for assistance required to prepare, manage, implement, monitor and control the Programme (Eligibility Rule No 11.2 of the Commission Regulation (EC) No 448/2004) and for guidance to potential partners (see table below).. The Technical Assistance budget should be also used for tasks to improve and to assure proper programme implementation on the DP level (e.g. studies, seminars, information and publicity measures, evaluation according to the Eligibility Rule No 11.3). Furthermore, support activities “specific to the content and approach of EQUAL”, such as thematic networking, dissemination of results and mainstreaming will be provided for through the Technical Assistance.

Specific categories and activities of the Technical Assistance are described in the table below:

Table 5: Category of technical assistance

Category of expenditures	Type of activities	Indicative budget
Regulation 448/2004/CE; rule11.2		
<p>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);</p> <p>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;</p>	<p>Training related to management and implementation of the programme for appropriate structures,</p> <p>Preparation of the procedure of selection of applications: edition and dissemination of application forms, expenses related to the announcement of the call for proposals,</p> <p>Preparation of the call for tenders for the implementation of tasks, assigned to the outside service providers, and procedures of selection,</p> <p>Participation in informational meetings and meetings of NSSs),</p> <p>Preparation of annual reports for the Commission</p> <p>Co-operation with other institution under European Union programmes,</p> <p>Organisation of the meetings of the Monitoring Committee,</p> <p>Setting up and functioning of the Project Appraisal Commission</p>	5%

<p>Expenditure relating to advice and support of individual DPs in technical, methodological and thematic matters;</p> <p>Expenditure relating to audits and on-the-spot checks of operations.</p>	<p>Training for DP promoters,</p> <p>Other necessary training for DP teams related to management, implementation, mainstreaming and transnational co-operation,</p> <p>Advising and guidance for project promoters regarding the priority themes, the partnership approach, through the whole period (from publishing call for proposals on)</p> <p>Audits and on-the-spot checks of operations</p>	
<p>Regulation 448/2004/CE; rule11.3</p>		
<p>Studies, seminars, information actions, the collection, editing and dissemination of the experience and results;</p> <p>Support to thematic networking, dissemination activities and the setting up of mechanisms for policy impact;</p> <p>Co-operation in European networking and ensuring the sharing of all relevant information with other Member States and the Commission</p> <p>Evaluation,</p> <p>The acquisition and installation of computerised systems for management, monitoring and evaluation.</p>	<p>Edition of complementary documents: application guides, application forms, other publication under the programme and to organisation of informational meetings (seminars, conferences, fairs and information events),</p> <p>Research and analyses,</p> <p>Organisation of thematic networks</p> <p>Organisation of fairs and information events</p> <p>Organisation of seminars and conferences,</p> <p>Edition and dissemination of publications,</p> <p>Implementation of the mainstreaming principle, dissemination of good practices</p> <p>Evaluation,</p> <p>Acquisition and installation of computer software and hardware necessary for management, monitoring and evaluation.</p>	<p>3%</p>

6.4.2 National Support Structure

While the Managing Authority will be responsible for the management of the Programme costs of which will be met by the Government, the NSS will assist the MA with these tasks and will be financed from the Technical Assistance budget. The NSS is planned to be composed of two distinctive parts: the internal NSS attached to the MA, and external, consultant part.

The NSS will be attached to the MA and will therefore be based in the MoLFSA (part of the Department of Labour Market, Employment and Education). It will be composed of 3-4 civil servants seconded full-time or of staff specifically recruited on temporary basis for this work. Apart from assistance to MA in the field of preparation, selection, appraisal and monitoring of the assistance and of operations, the NSS will facilitate communication between the DPs and the MA and facilitate the mainstreaming and networking actions. In relation to the DPs, the NSS will, in general, provide technical assistance in achieving the DPs aims and objectives, as well as in meeting the reporting requirements.

Competent external service provider(s) will be contracted to perform, on behalf of the MA, the following tasks:

- appraisal of the projects
- audits and on-the-spot checks of the operations
- evaluations
- studies
- research and seminars
- support the MA in performing information actions
- develop and/or upgrade computerised monitoring and evaluation systems

In addition, these external consultants will be selected in compliance with national and Community rules, in particular those on public procurement, and will, accordingly, be based on competitive tendering following an open Call for Tenders.

Furthermore, a tender for the ongoing evaluation to be performed by an independent external consultant will be published early enough so that the evaluation process is commenced at the same time as the selected DPs start working at the latest.

6.5 Development Partnerships

Partnership is one of six general principles that govern EQUAL. Development Partnerships can bring together a range of organisations to design and deliver a coherent strategy to address a specific cause of discrimination and/or inequality in the labour market. Partnership should be inclusive, having at least two partners of different types. Partners in DP may include, for example:

- Non-governmental organisations or associations
- Local, regional or national authorities
- Social partners
- Enterprises (especially SMEs)
- Public or private specialised agencies (e.g. for education...).

The process of formation of Development Partnerships (DPs) will start an initiator or a group of initiators that will already have formulated certain basic ideas on future organisation and operation of the DP. The DP application will envisage how new partners can join and participate in the DP. The DP may establish a coordinator of transnationality activities.

The DP will submit the application for entry into Action 1 of the Programme. During Action 1, the selected DPs may admit other organisations and will finalise their consolidation of the new organisation by establishing management and communication structures, core operational activities to be carried out under the EQUAL thematic fields. The DPs will also consolidate arrangements for transnational cooperation and agree with transnational partners on arrangements for future work throughout the Programme.

Further details on the requirements and selection process for Development Partnerships will be provided in the Programme Complement.

Once selected, the Ministry of Labour, Family and Social Affairs in its function of Managing Authority will sign a grant letter (contract) with the DP. In case the DP is not a legal entity, the grant letter will be signed between the Managing Authority on the one part, and the lead organisation within the DP, on the other part, acting on behalf of the consortium of DP partners.

The grant letter will set out the terms and conditions for the implementation of the DP activities and, following the signature of both parties, will be a binding contract between the Managing Authority and the DP or the lead organisation.

6.6 Complementarity and Compatibility with Community policies

6.6.1 Compatibility with Community policies

Practical arrangements to ensure compatibility with Community policies, as well as the ESF operations under the Objective 1 Single Programming Document will be provided. The priorities of EQUAL CIP will support the implementation of the three overarching objectives of the European Employment Strategy (full employment, improving quality and productivity at work, strengthening social cohesion and inclusion) in Slovenia, and in this framework the Employment Guidelines of 2003 that will be considered priorities for action. They are in line with the 'knowledge-based Europe capable of sustainable economic growth with more and better jobs and greater social cohesion' orientation and the conclusions of the Lisbon European Council of 2000.

The Priority 2 of the Slovene Objective 1 Single Programming Document entitled "Knowledge, human resource development and employment" sets the measures in line with the ESF Regulation policy fields, which are: developing and promoting active labour market policies, facilitating social inclusion, lifelong learning and fostering entrepreneurship and adaptability. Similarly, the EQUAL priorities also cover some of the policy fields of the ESF Regulation (active labour market policy, the fight against discrimination and social exclusion and the promotion of lifelong learning). Nevertheless, the search for new, innovative and experimental solutions to problems connected with exclusion from labour market and with social exclusion, and with fight against discrimination and inequality on labour market is the central role of Community Initiative EQUAL. According to this, the focus of EQUAL in Slovenia is placed on facilitating access and return to the labour market for those who are the furthest from the labour market, on lifelong learning programmes and inclusive work practice, which are specially adopted for the most vulnerable target groups, and on additional initiatives in the field of equal opportunities for women and men. Special measure is developed for social and professional inclusion of asylum seekers.

The selected EQUAL themes will thus complement the ESF measures with the help of concentration on the search for innovative methods in the fight against discrimination and inequality on the labour market (especially for older workers, women, Roma, homeless people, ex-prisoners, alcohol and drug addicts and asylum seekers). The activities, which will be implemented with the support of the ESF and the EQUAL Initiative, will not duplicate but rather supplement each other.

Apart from Objective 1 SPD, the CIP EQUAL has common points and cross-sections also with other European programmes, instruments and measures, which reach beyond the field of labour market. The EQUAL CIP, on the other hand, is focused especially on labour market and social inclusion what makes it complementary to the following programmes:

- Objective 1 SPD
- Community Initiative INTERREG III
- Programme LEONARDO
- European Refugee Fund
- and other national programmes (Action employment programme for unemployed Roma, etc).

Special attention will be placed on harmonisation and complementarity with the listed thematically connected programmes in the processes of selection of applications, monitoring and evaluation of projects. Complementarity and assurance that there is no overlapping and double funding with other programmes will be further supported by:

- Cross-representation in programme committees
- Consultation on Objective 1 SPD and
- Ensuring liaison between the relevant LEONARDO and INTERREG National Agencies and EQUAL National Support Structure.

6.6.2 Compatibility of CIP EQUAL and ESF mainstream programme of Objective 1 SPD

Table 6: CIP EQUAL – Objective 1 SPD compatibility table

	EQUAL CIP	Objective 1 SPD	
PRIORITY	Employability	Priority No 2: Knowledge, HRD and employment	
MEASURE	Theme 1: Facilitating access and return to the labour market	Measure 2.1: Developing and promoting active labour market policies	Measure 2.2: Facilitating social inclusion
ACTIVITIES	<ul style="list-style-type: none"> – Development of new integrated motivation-guidance-labour market integration programmes and mechanisms and supported progression outcomes – Development of new training solutions and new support tools that consider the target group’s specific needs – Mainstream specific skills training that accommodates the needs of those that are facing barriers due to discrimination and realize outcomes in terms of access to employment – Development of local and/or sectoral approaches to identifying employment opportunities 	<ul style="list-style-type: none"> – Training aimed at improving skills of unemployed: <ul style="list-style-type: none"> – Institutional training programmes – Workplace training and integrated training programmes – <i>Encouraging local employment programmes through local partnerships – HORIZONTAL ISSUE</i> – Education of unemployed (raising the educational attainment of unemployed people). The activity will enable participants to obtain a publicly recognised education. 	<ul style="list-style-type: none"> – Pathway to integration: Information, guidance, counselling, training and education of selected target groups through a pathway approach to inclusion – – Employment aids: Local employment development programmes aimed at facilitating the employment of unemployed persons facing difficulties in entering the labour market, including the development of new sources of employment, in particular in social economy – <i>Encouraging local employment programmes through local partnerships – HORIZONTAL ISSUE</i>

DIS-ADVANTAGED/TARGET GROUPS	Disabled, Roma, as well as victims of violence, people with mental health problems, addicts and persons in post-penal treatment	Registered unemployed people	Registered unemployed: Long-term unemployed (over 2 years), unemployed disabled, ethnic minorities (Roma), young people, who have left the school, other disadvantaged groups (victims of violence, ex-addicts, persons in post-penal treatment, etc.)
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	EQUAL CIP	Objective 1 SPD	
PRIORITY	Adaptability	Knowledge, HRD and employment	
MEASURE	Theme 5: Promoting lifelong learning and inclusive work practices	Measure 2.3: Lifelong learning	Measure 2.4: Fostering entrepreneurship and adaptability
ACTIVITIES	<ul style="list-style-type: none"> – Creating new education and training methods using ICT – Awareness and motivation actions aimed at low qualified employees with difficult access to education – Developing and offering adapted learning programmes – Awareness actions to promote lifelong learning especially among SMEs and managers. 	<ul style="list-style-type: none"> – Modernisation and development of education and training programmes in vocational and tertiary education (including postgraduate level) – Development and extension of adult education schemes aimed at professional training of adults with education deficit, dropouts and adults with low functional and digital literacy, individualised forms of learning – Development and expansion of the network of ICT supported local/regional lifelong learning centres, assuring support services to participants in learning activities, career and vocational guidance services – Training of teachers, in particular, of secondary and upper-secondary schools, trainers, mentors/tutors etc. – Extension of quality assurance model, based on the principle of self-evaluation, with special emphasis on vocational education and adult education 	<ul style="list-style-type: none"> – Continuous training of employees – sectors in restructuring (textile, leather, footwear industries, etc.) – Continuous training of employees in propulsive sectors: With an emphasis on the ICT, R&D, and sustainable development, this activity shall supplement national efforts in improving competitiveness and promoting regional development – Training and support for setting up enterprises – Development of new sources of employment: local employment development programmes

DIS-ADVANTAGED/TARGET GROUPS	Older people with low skills and low level of qualification, people with low income, including individuals facing other disadvantages in relation to the labour market	<ul style="list-style-type: none"> - Institutions and entities involved in designing, planning and delivery of education and training; - Trainers (teachers, trainers, mentors/tutors etc.) - Adults involved in education and training activities (in particular those with only basic or lower secondary vocational school, low level of functional literacy, dropouts) 	Employees, employers, potential entrepreneurs, managers
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	EQUAL CIP	Objective 1 SPD			
PRIORITY	Equal opportunities	Equal opportunities: Horizontal priority			
MEASURE	Theme 8: Reducing gender gaps and supporting job desegregation	2.1: Developing and promoting ALMP	2.2: Facilitating social inclusion	2.3 Lifelong learning	2.4 Fostering entrepreneurship and adaptability
ACTIVITIES	<p>a) Initiatives to combat discrimination in employment:</p> <ul style="list-style-type: none"> – Foster women career progression particularly through access to learning – Active action plans to promote women access and participation in taking decisions processes, management positions and social negotiation. <p>b) Initiatives to promote women participation in labour market</p> <ul style="list-style-type: none"> – Promote both men’s and women’s integration in sectors and occupations in which they are traditionally under represented – Work with attitudinal and cultural change towards women and ICT – Pilot ways of breaking down and overcoming stereotypes of “women’s and men’s work” 	<p>– <i>Training and education of women as part of the pathway to integration is promoted through gender mainstreaming approach</i> – HORIZONTAL ISSUE</p>	<p>– <i>Tackling and preventing social exclusion of women is promoted through gender mainstreaming approach</i> – HORIZONTAL ISSUE</p>	<p>– <i>Equal opps. in education, training, including ICT training, and learning are promoted through gender mainstreaming approach</i> – HORIZONTAL ISSUE</p>	<p><i>The following is promoted through gender mainstreaming approach – HORIZONTAL ISSUES:</i></p> <ul style="list-style-type: none"> – <i>Increased level of human capital through professional training and retraining of employed women (especially in sectors facing restructuring as well as those with development prospects).</i> – <i>Women entrepreneurship, for example through the new lines of business and new forms of work organisation</i> – <i>Activities are planned to help ageing women to cope with, and stay in their work.</i>
DIS-ADVANTAGED/TARGET GROUPS	Women; men can be also targeted	Unemployed women aged over 40, disabled women with special needs, lower skilled female workers in labour intensive sectors who are at risk of becoming unemployed			

	EQUAL CIP	Objective 1 SPD
PRIORITY	Asylum seekers	Not included in the SPD
MEASURE	Theme 9: Helping the integration of asylum-seekers	
ACTIVITIES	<ul style="list-style-type: none"> – Familiarisation with the culture and habits of Slovenia to ease the transition – Language training and communication skills to aid integration, including basic literacy – Customised training to help find suitable employment (e.g. ICT training, training aiming at acquiring technical language and skills which link up with the already existing knowledge and skills of the asylum seeker) – Establish and implement learning paths for asylum seekers aiming at the quicker integration on the Slovenian labour market – Intensive coaching of the asylum seeker and promotion of contact with employers 	
DISADVANTAGED/ TARGET GROUPS	Asylum seekers	

6.6.3 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" rule¹⁵). Where they constitute State aid, as they are intended to facilitate access to work, or reducing risky employment situations for disadvantaged people, they would mostly fall under the block exemption for aid to SMEs¹⁶, Employment aid¹⁷ or training aid¹⁸.

¹⁵ 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

¹⁶ 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

¹⁷ 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

¹⁸ 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

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 Control Sector of the Ministry of Finance which is the designated authority for national 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.

Table 7: List of relevant State aid rules

Block exemption	Company characteristics	Scope and EQUAL specific activities exempted	Maximum aid intensity for EQUAL Slovenia 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. Slovenia 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% ¹⁹ Further increases for: SME : 10% Disadvantaged workers:10% General training: 60% ²⁰ Further increases for: SME : 20% Disadvantaged workers:10%	€ 1,000,000	Commission needs to be informed within 20 working days

¹⁹ 25% + 10% (Art. 87 (3) (a) regional increase)

²⁰ 50% + 10% (Art. 87 (3) (a) regional increase)

Aid for employment	All companies	<p>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 from working life or ex-prisoners.</p> <p>For conditions include net increase in no of jobs, maximum duration of aid</p>	<p>Job creation: Regional aid ceiling</p> <p>Recruitment of disadvantaged people: 50%</p> <p>Recruitment of disabled people: 60%</p> <p>Aid for additional costs of employing disabled people: 100%</p>	<p>€ 15,000,000 over 3 years for a single enterprise</p>	<p>Commission needs to be informed within 20 working days.</p> <p>Other types of job related support are not exempted (aid for job sharing, aid for other types of disadvantaged workers, ...)</p>
The aid for small and medium-sized enterprises	SMEs with less than 250 employees	<p>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.</p>	<p>Services by outside consultants and participation in fairs: up to 50%</p> <p>Investment:</p> <p>Regional aid ceiling + 15%;</p> <p>Maximum aid intensity: 75%</p>		<p>Commission needs to be informed within 20 working days</p>

State Aid Table

This EQUAL CIP provides public funding for 4 measures. To the extent that undertaking participates in a Development Partnership, the Managing Authority will ensure that any grant to such an undertaking will comply with the rules listed in the following table:

Table 8: State aid rules applicable to the CIP measures

Measure description	Block exemptions			Other cases	
	Aid for employment	Aid for training	Small and medium -sized enterprises	De minimis rule	Ad hoc notification
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					
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					
8. Reducing gender gaps and supporting job desegregation					
9. Supporting the social and vocational integration of asylum seekers.					

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.

6.7 Reporting

6.7.1 Annual Implementation Report (Article 37 of Regulation 1260/99)

Pursuant to Article 37.1 of Council Regulation (EC) No 1260/1999, the Managing Authority will, within six months of the end of each full calendar year of implementation submit to the Commission an annual implementation report. As provided for in Article 34.1(c), the report will be previously examined and approved by the Monitoring Committee. The Commission will indicate in two months of receiving the report if the

report is considered to be unsatisfactory. Otherwise the report will be deemed to be accepted.

Pursuant to Article 34.2 of Council Regulation (EC) No 1260/1999, every year after submitting the annual implementation report, the Managing Authority, in cooperation with the Commission, will review the main outcomes of the previous year. Afterwards, the Commission may make comments to the Member State and the Managing Authority. Soon after, the Member State will inform the Commission of the follow-up actions taken. Where the Commission considers the measures taken inadequate, the Commission may make recommendations to the Government of Slovenia and the Managing Authority for adjustments aimed at improving the effectiveness of CIP management and monitoring arrangements. If the Commission has made such recommendations, the Managing Authority will demonstrate the steps taken to improve the management and monitoring arrangements, or will explain why the adjustments have not been taken into account.

Certain homogeneity in the annual reports of the various Member States is desirable for the good monitoring of the overall implementation of the Initiative and to co-ordinate the networking efforts at national and European levels.

The quantitative minimum common data concerning implementation, to be transmitted at the time of the annual report, will be covered by the transmission to the ECDB (Annex B). The other relevant indicators of situation, result or impact, as anticipated by this CIP, will also be communicated, by means of the annual report.

Insofar as the implementation of EQUAL will be progressive, a common format cannot be determined in advance. Each year, in good time, a common structure for the annual reports will be determined in close co-operation between the Commission and the representatives of the Managing Authorities. This common structure by no means prevents the Managing Authority and the Monitoring Committee from adding to it any element that it will judge relevant.

6.7.2 *Final Implementation Report (Article 37 of Regulation 1260/99)*

Pursuant to Article 37.1 of Council Regulation (EC) No 1260/1999, a final implementation report will be submitted to the Commission within six months of the final date of eligibility of the expenditure. Substantive and procedural requirements set in the annual implementation report will also be extended to the final implementation report. The Commission will inform the Member State of its approval or non-approval of the report within five months of examining the report

6.8 Information and Publicity Strategy

The information and publicity measures for the interventions of Structural Funds are aimed at publicising the actions of the European Union, increasing transparency and creating a uniform image of the interventions throughout all Member States. The information and publicity measures are presented in the form of a communication plan whereby the implementation shall be the responsibility of the respective Body responsible for the interventions.

The communication plan contains information on:

- The goals and disadvantaged groups
- The content and the strategy of the communication and information measures
- An indicative budget
- The administrative bodies or institutions responsible for their implementation
- The evaluation criteria used for assessing the measures implemented.

The Managing Authority is responsible for information and publicity measures before and during the implementation of the programme. The Managing Authority shall:

- Develop an overall strategy for the information and publicity for the implementation of the programme and to develop an overall system for the public relations related to the Programme
- Develop and maintain the internet site where necessary information can be obtained for the applicants and other interested parties
- Maintain necessary public relations with media
- Develop information materials for the public relations
- Develop necessary labelling for the Programme to be used in all communications with media
- Organize project development workshops, seminars and conferences
- Involve representatives of the European Commission in the information and publicity
- Appoint a person responsible for the information and publicity.

The EQUAL Guidelines calls for the greatest possible degree of participation of public and private bodies, Non-Governmental Organisations (NGO's), the community and voluntary sector, trade unions, employers and other social partners. The Managing

Authority will encourage their participation and will also facilitate the exchange of views and co-operation on all levels (national, regional and local).

The first consultation with NGO's and Regional Development Agencies was already organised in July 2003 on the national level in order to inform them about the Initiative and to discuss the possibilities offered by EQUAL. Their proposals were already taken into account where appropriate in the CIP. There will be further similar events organised on national and local levels in order to get feed-back for the finalising the CIP according to the needs and proposals of the potential applicants and Development Partnerships.

The CIP and Programme Complement will be accessible on the web page. The Programme Complement will describe the following aspects of the programme:

- an outline of the programme and of all measures
- description of the implementation provisions, including financial allocations, process of setting up DPs, transnational cooperation, development of actions, activities and eligible costs, and financial justification and reimbursement provisions
- application procedures and DPs selection process, including call for proposals, assessment and selection process, and starting of actions
- monitoring system, including the typology of activities and indicators, information mechanisms, data collection, and monitoring
- provisions for evaluation, including on-going evaluation and internal DPs evaluation
- control arrangements
- information and publicity strategy
- compatibility with Community policies
- financial tables for the programme.

The communications action plan referred to in point 3 of the Annex to the Regulation No 1159/2000 will thus be set out in the Programme Complement and will include:

- Information days widely advertised in different media,
- Consultation days on local and regional level,
- Website and mailing lists,
- Preparation and distribution of an information pack.

It will be the responsibility of the Managing Authority to ensure that the information and publicity requirements of the Commission Regulation (EC) No 1159/2000 are met. The

contribution of the Structural Funds to EU co-financed expenditure will be acknowledged as appropriate. The Commission logos where relevant will be displayed in all publicity material, application forms, on signs for DPs etc. as required under the Commission Regulation on Information and Publicity. A particular attention will be paid to publicising the European Social Fund (ESF) properly. The Commission will be consulted and informed by the Managing Authority each year of the initiatives taken with regard to information and publicity measures.

6.9 Co-operation with third countries

Co-operation under this Programme may also extend to similar projects supported in a non-Member State eligible for funding under the PHARE, TACIS, MEDA or CARDS Programmes.

7 FINANCIAL ISSUES

7.1 Financial Plan

The Financial Plan for EQUAL is structured within the framework of four chosen themes, which will count as measures. In addition, there will be two measures within the Technical Assistance as referred to in Chapter 5.4. The Financial Plan for the Programme is attached in Annex A to the Programme document.

The Commission has agreed, for all EQUAL Programmes, to interpret the terms of Article 19 (3) of the General Regulation in a flexible manner, on condition that the text of the CIP contains a table showing the indicative allocation per theme, in percentage of the overall budget, or in Euro.

7.2 Co-Financing

The Development Partnerships implementing activities under Theme 1, Theme 5, Theme 8, and Theme 9 will be entitled to co-financing of their activities composed of 75% of ESF funds, and 25% of national public funds assured by the MoLFSA. The ESF intervention rate of 75% is thus calculated in relation to total public eligible costs. The amount available from private sources, including that to be made available in accordance to the state aid rules, is difficult to quantify in advance. However, DPs implementing activities under Theme 5 (Adaptability) are expected to assure DP's co-financing in accordance to the relevant state aid rules.

Mechanisms for implementing co-financing will be further described in the Programme Complement.

Eligibility of activities

Further to the provisions of Article 20(1)(d) and Article 21(2) of Council Regulation (EC) 1260/1999, the activities covered by the CIP EQUAL are eligible for financing from the European Social Fund. EQUAL may also fund activities normally eligible under European Regional Development Fund (ERDF), European Agricultural Guidance and Guarantee Fund (EAGGF) or Financial Instrument for Fisheries Guidance (FIFG) rules, provided that this type of activity complements activities normally eligible under ESF, and that relevant state aid rules are respected.

Taking into account the amount of funds available under the CIP EQUAL and expecting most of the activity under EQUAL to be focused on ESF eligible activity rather than towards capital expenditure, the standard rule that a single capital expenditure can cost no

more than 1,500 Euro, and that all DP's capital expenditures can not exceed 15% of the DP budget will apply. If the DP could make a strong case to justify the required capital expenditure, exceptions to this rule could be considered.

8 SHARING OF MONITORING DATA

8.1 Sharing of data at an European level

Slovenia 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 X, they constitute the exhaustive²¹ 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 section 6.2 Monitoring arrangement. The set of data shared at EQUAL level is summarised in the Annex X.

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 Slovene language).

The Managing Authority will collect the physical data from the Development Partnerships on the basis of methods of data collection in Slovenia. 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 information²² transmitted by the Member States.

²¹ 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.

²² On the basis of decisions taken in a concerted way, access to certain fields could be restricted.

9 EVALUATION

9.1 Ex-ante evaluation

The ex-ante evaluation of this Programme was carried out in accordance with Article 41 of Council Regulation (EC) 1260/1999 by an independent group of experts. The evaluation is attached in Annex C to the EQUAL CIP.

9.2 Ongoing evaluation

Articles 40-43 of Regulation (EC) 1260/1999 set out the requirements for evaluating the Slovenian Community Initiative Programme.

The evaluation of the Slovenian 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.

Slovenia 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, Slovenia 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.

In defining the terms of reference for the on-going evaluation, the Management Authority will apply the Guidelines for monitoring and evaluating EQUAL²³, 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 results from the Development Partnerships evaluation are an important source of information for evaluation.

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. 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 Slovenia to follow. A particular focus on the initial phase of the on-going evaluation will be providing lessons for the future programming period.

The Slovenian 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 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.

²³ "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

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.

9.3 Ex-post evaluation

For the EQUAL CIP the final ex-post evaluation will be assured by the EC in co-operation with the Managing Authority in accordance with Article 43 of Council Regulation (EC) 1260/1999. It will be carried out no later than three years after the end of the programming period.

Further to the EQUAL Communication²⁴, the ex-post evaluation will cover the utilisation of resources, the effectiveness and efficiency of the assistance and its impact. It will draw conclusions regarding policy on economic and social cohesion and will cover the factors contributing to the success or failure of implementation and the achievements and results, including sustainability.

²⁴ Communication from the Commission to the Council, the European Parliament, the 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 ideas”

10 ANNEX A FINANCIAL TABLES FOR OPERATIONAL PROGRAMME

Financial tables must be broken down by Theme and by year.

The Financial Plan must be presented in the format shown below. All sums must be shown in Euro, in full (i.e. with no rounding).

Intervention rate for 2004-2006 is 75%. Technical Assistance is at 8% intervention for all years.

Theme/Year	Total Eligible Cost	Total Public Elig. Cost	ESF partic.	National public participation					Private Elig. Cost (est.)	Revenue (est.)
				Total	Central	Regional	Local	Other (to be specified)		
	(+2+9+10)	(3+4)		(+5+6+7)						
	1	2	3	4	5	6	7	8	9	10
Theme 1	5.153.815	5.153.815	3.865.361	1.288.454	1.288.454	0	0	0	0	0
2004	1.236.571	1.236.571	927.428	309.143	309.143	0	0	0	0	0
2005	1.711.768	1.711.768	1.283.826	427.942	427.942	0	0	0	0	0
2006	2.205.476	2.205.476	1.654.107	551.369	551.369	0	0	0	0	0
Theme 5	1.288.453	1.288.453	966.340	322.113	322.113	0	0	0	0	0
2004	309.143	309.143	231.857	77.286	77.286	0	0	0	0	0
2005	427.941	427.941	320.956	106.985	106.985	0	0	0	0	0
2006	551.369	551.369	413.527	137.842	137.842	0	0	0	0	0
Theme 8	1.288.453	1.288.453	966.340	322.113	322.113	0	0	0	0	0
2004	309.143	309.143	231.857	77.286	77.286	0	0	0	0	0
2005	427.941	427.941	320.956	106.985	106.985	0	0	0	0	0
2006	551.369	551.369	413.527	137.842	137.842	0	0	0	0	0
Theme 9	171.794	171.794	128.845	42.949	42.949	0	0	0	0	0
2004	41.219	41.219	30.914	10.305	10.305	0	0	0	0	0
2005	57.059	57.059	42.794	14.265	14.265	0	0	0	0	0
2006	73.516	73.516	55.137	18.379	18.379	0	0	0	0	0
Tech. Ass.	687.176	687.176	515.382	171.794	171.794				0	0
2004	164.876	164.876	123.657	41.219	41.219	0	0	0	0	0
2005	228.236	228.236	171.177	57.059	57.059	0	0	0	0	0
2006	294.064	294.064	220.548	73.516	73.516	0	0	0	0	0
Total	8.589.691	8.589.691	6.442.268	2.147.423	2.147.423	0	0	0	0	0
Total 2004	2.060.952	2.060.952	1.545.713	515.239	515.239	0	0	0	0	0
Total 2005	2.852.945	2.852.945	2.139.709	713.236	713.236	0	0	0	0	0
Total 2006	3.675.794	3.675.794	2.756.846	918.948	918.948	0	0	0	0	0

11 ANNEX B: DATA SHARED THROUGH THE EQUAL COMMON DATABASE (ECDB)

Annex B: 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
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B2.	Title of the DP	Text field – max 80 characters
	National language	<i>Simple & short</i>

B3.	Title of the DP	Text field – max 80 characters
	International 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
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B5.	DP managing organisation	One choice in the table of the partners
		<p><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.</i></p> <p>Click in the list of the members</p>

B6.	Other responsibilities	<p><i>For each item, click in the list of the members</i></p>
		<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

B9.	Geographical/sectoral	Max 1 choice
		<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 1 choice <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 1 choice
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		<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"> <thead> <tr> <th></th> <th>+</th> <th>++</th> <th>++</th> <th>++</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Assistance to persons</td> <td></td> <td></td> <td>+</td> <td>++</td> </tr> <tr> <td><input type="checkbox"/> Guidance and counselling</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Training</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Training on work place</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Work placement</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> Job rotation and job sharing</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/> employment aids (+ for self-employment)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td><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"/> 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	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"/> 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
	2° Participants - Stakeholders	Multiple choice <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	+	+	+	+
				+	+	+
					+	+
						+

		<ul style="list-style-type: none"> - Exchange of information and experiences - Parallel development of innovative approaches - Import, export or adoption of new approaches - Joint development - 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).
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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				

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		

		<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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12 Annex C: EX ANTE EVALUATION OF THE EQUAL COMMUNITY INITIATIVE

As per Article 41 of the General Regulation