STANDARD SUMMARY PROJECT FICHE

1. Basic Information

1.1 Désirée Number: 2002/000-282.08.02

1.2 Title: EQUAL Initiative

1.3 Sector: Employment, Social Affairs, Health

1.4 Location: Czech Republic

2. Objectives

2.1 Overall Objective(s):

- To enable the Czech Republic to take the obligations of membership, including adherence to the aims of political, economic and monetary union.

2.2 Project purpose:

- To assist the Czech Republic in the preparation for the implementation of the European Social Fund, particular the EQUAL Initiative.

2.3. Accession Partnership and NPAA priority:

- Link to the Accession Partnership 2001: “fulfil the measures aiming at fighting against discrimination” and “support the creation of new job opportunities and improve access to education”;
- Link to the NPAA 2001: under the medium-term priorities / Chapter 3.6.1.2.3 there is stated to “develop the partnership with NGOs and strengthen its capacity in enforcing opportunities for men and women” (pg. 163) and “prepare proposals considering adequate institutional framework to provide national policy of the EQUAL opportunities…”;
- Link to the Regular Report 2000: under the Political Criteria there is stated that “… a lasting improvement in the situation of the Roma requires sustained effort over time. Further progress is needed…” (pg. 27); under the Chapter 13 Social Policy and Employment there is stated that “The administrative capacity needed to ensure that the directives on equal opportunities of men and women are duly enforced, needs to be strengthened.” (Pg. 68).

2.4. Contribution to National Development Plan:

- Link to the National Development Plan of the Czech Republic - priority 3.2 Social integration and equal opportunities;
- Link to the SOP for Human Resources Development of the CR - priority 2: Social inclusion and equal opportunities.

3. Description

3.1. Background and justification:

- The EQUAL Initiative, being a part of the European Social Fund, is very precisely described at respective web site of the European Commission including relevant materials and links to individual Member States web sites (http://europa.eu.int/com/employment_social/equal). Therefore the description below just gives an overview of the main relevant features of the programme;
- The first call for proposals in all participating countries of the European Union for the EQUAL Initiative Action 1 was published in the spring 2001. In all EU Member States the selection procedure has been already finalised, and in line with the European Commission decision, all Development Partnerships have been selected for Action 1. On June 18th 2001 the Deputy Prime Minister took a decision on the Czech Republic involvement into the EQUAL Initiative (701/25922/2001). The Ministry of Labour and Social Affairs, on the basis of the above-mentioned decision, initiated necessary steps towards the Czech Republic preparation for the full involvement. The core national structures, including Head of Mission, Monitoring Committee, National Support Structure and Evaluation Team were nominated. They all are supposed to act in a way that allows building experienced organisational infrastructure for the programme functioning after
the EU enlargement. The ex-ante evaluation Terms of Reference were adopted at the first meeting of the Monitoring Committee.

The National Support Structure has been finishing work on the development of all necessary means for projects submission (national guidelines for applicants, application forms), assessment (evaluation criteria), selection (selection procedures), projects implementation (financial and administrative rules including reporting), monitoring (both content and financial aspects) that follows Phase rules. Furthermore the Evaluation Team initiated development of impact assessment analysis (evaluation ex-ante, evaluation strategy, key indicators, ongoing and ex-post evaluation).

One of the goals for the Czech Republic was to overcome the delay of joining the programme and to achieve the same state of both the Development Partnerships and the implementation environment readiness as the EU countries for the EQUAL Initiative by January 2002. That allows the Czech Development Partnerships to get involved into EQUAL transnational partnerships (TNP) and develop necessary Transnational Partnership Agreements (TNPA) by the same deadline as applicable to the Member States.

This implementation calendar would allow to start the Action 2 in the Czech Republic almost at the same time as in EU countries (i.e. in July 2002) and to follow the rest of the programme modalities similarly. To achieve this goal the selection process has to stick to the very tight timetable described in Annex 2. The selection process for Action 1 and the preparation of the call for proposals for Action 2 took place in the end of year 2001. Close co-operation with representatives of the EC Delegation in Prague and the EC, DG Employment, who are represented in the Czech Monitoring Committee, has started;

The project is supposed to supplement the European Commission, DG Employment measures of co-financing for European Union Member States participation in the EQUAL Initiative. For the Czech Republic the rate of co-financing of 50% for Action 2, 3 and 4 is foreseen. The remaining costs, including the whole costs of Action 1 and its management and ex-ante evaluation, will be covered by the Ministry of Labour and Social Affairs;

The leading principles of EQUAL are:

- Partnership: including public authorities, representatives of employees and employers, equality commissions, education and training communities, voluntary and community sectors and national authorities for the countries;
- Thematic approach: to explore new ways of tackling the problems common to different types of discrimination and inequality, rather than focusing on a specific group;
- Transnationality: to work in co-operation with partnerships from EU Member States, learning lessons, developing new methods and approaches to training and job creation and exchanging expertise and experience;
- Empowerment/participation: those targeted for support will have the opportunity to influence the design and evaluation of proposed activities to help them;
- Innovation: including new methods of delivery, new systems or innovative actions to address gaps identified in key reports, and;
- Dissemination and mainstreaming: to help inform policy developments at a national and European level;

EQUAL operates in thematic fields defined in the context of the four pillars of the European Employment Strategy (EES): Employability, Entrepreneurship, Adaptability, and Equal Opportunities. In addition to these themes, the programme supports a further theme of activities to help the social and vocational integration of asylum seekers;

Throughout those themes the strategy for EQUAL aims to:

- ensure that activities principally benefit those who are the subject to the main forms of discrimination and inequality;
- each thematic field will be fully accessible to all such groups;
- ensure that the promotion of equality between women and men is integral to the thematic fields in all four pillars as well as being targeted through specific actions in the fourth pillar;
- the ideal of improving the equilibrium between supply of and demand for quality jobs with a future;
- encourage the effective exploitation of existing mechanisms (for example those that exist for social dialogue) to improve awareness of the factors leading to discrimination, inequality and exclusion in connection with the labour market.

Target groups of the EQUAL Initiative include women, ethnic minorities, people with disabilities, older workers, refugees, graduates, ex-offenders, drugs and alcohol misusers, etc. It will play a key role in linking together the EU supported actions under Articles 13 and 137
Nine Thematic Priorities (A – I) of EQUAL Initiative:

Employability
A. 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;
B. Opportunities to promote potential for ethnic minorities within the world of work;

Entrepreneurship
C. Opening up the business creation process to all by providing the tools required for setting up businesses and for the identification and exploitation of new possibilities for creating employment in urban and rural areas;
D. Strengthening the social economy (the third sector), in particular the services of interest to the community, with a focus on improving the quality of jobs;

Adaptability
E. Promoting lifelong learning and inclusive work practices which encourage the recruitment and retention of those suffering discrimination and inequality in connection with the labour market;
F. Supporting the adaptability of firms and employees to structural economic change and the use of information technology and other new technologies;

Equal Opportunities for women and men
G. 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;
H. Reducing gender gaps and supporting job desegregation;

Asylum seekers
I. Helping the integration of asylum-seekers. Assistance may be for new ways of helping to access the labour market, or to provide training for unsuccessful asylum seekers prior to their leaving the country.

- The Czech Republic has already selected 7 out of the 9 EQUAL thematic priorities (A-G, see Annex 5)

- This programme is expected to result in a number of projects, targeting the aims of the EQUAL Initiative EU rules, allowing both achievement of the programme goals and establishment of absorption capacity for forthcoming full participation in the programme. The national structures capable to assure programme implementation and compliance with the EU regulations and rules applicable to the EQUAL Initiative are to be established. A special programme is supposed to lead to establishment and testing the national rules for implementation of the EQUAL Initiative in the Czech Republic which would be corresponding to the EU ones and would be in place when the enlargement takes place.

- Projects will involve variety of institutions from different sectors and regions, including among others central and local public administration, schools and other types of training providers, social partners, non-governmental organisations, enterprises including SMEs and representatives of the disadvantaged groups;

- One of the key requirements of Development Partnerships (DP) is to develop innovative work programmes that produce outcomes worthy of dissemination and mainstreaming at both national and EU level. Innovation is therefore of central importance in the selection process of EQUAL. It is a concept that is, however, difficult to define and assess. As a general definition innovations are novel changes in a system, which are performed and achieved for the first time in its development. This first-time aspect of a novel change - the development aspect - is an important but insufficient criterion for innovations; a more important one is that the development should lead to something qualitatively new which increases the efficiency of a given system. Innovations provide better solutions to problems than contrived in the previous state. The decisive determinant of the innovative content of the new solution is its relation to the old one. It is the relation to previous solution approaches that determines the degree of innovation of a novel change. (A Methodology for European valuation of the Employment Initiative” 1999, NEI/FHVR, p17)

The Evaluation of Adapt and Employment found that innovation could come in various different forms. These include:

- Process-oriented innovations: these relate to the development of new or improved methods, content, use of technology and approaches to integration in labour market initiatives. Examples of process-oriented innovations include the development of new training materials, new or improved approaches to the delivery of training and guidance, and new combinations of approaches;

- Goal-oriented innovations: these relate to the development of new vocational qualifications, new approaches to working with particular target groups, and new ways of enhancing the transition into employment for particular target groups. Examples include approaches involving new qualifications and opening up new areas of employment for disadvantaged groups and individuals at risk of displacement in the labour market, the integration of accreditation systems, and new approaches to support the re-engagement with education, training and the labour market;

- Context-oriented innovations: these relate to the political and structural frameworks within which labour market interventions take place. Examples include the development of local, regional and national networks, new frameworks for and approaches to dissemination, information and awareness raising activities and steps to engage new actors and establish new working arrangements.
Under EQUAL innovation is categorised as follows:

- By nature - following the type of process, goal or context oriented innovation described above;
- By what work programmes plan to implement - using the following categories:
  - completely new approaches to working with specific target sectors or groups;
  - new combinations of existing approaches;
  - improvements to existing approaches;
  - existing approaches with new target groups or in new contexts.

- The idea of empowerment is that those who have little or no influence, such as excluded people, are able to acquire the capacity to have informed opinions, to take initiatives, make independent choices and influence change. It also means that those with influence actively change their attitudes and rules and change the way decisions are made through engaging with excluded people. The aim of projects based on the principle of empowerment is to encourage excluded people to take more responsibility and get more control over their lives. At the same time, they aim to change systems and rules to enable excluded people and groups to get fully involved in the labour market and in society. In terms of the EQUAL programme, empowerment means that those suffering from discrimination in the labour market are given the means to participate in project implementation and in decision-making at all levels. Under EQUAL the idea of empowerment is closely linked with innovative work as the programme aims to link strategies for employment with strategies for social inclusion, a challenging task that requires new thinking and approaches. Scoring will be positively weighted to involve the participation of target groups in DP programmes. DPs must demonstrate how they intend to involve target groups in their partnership agreement and indicate what mechanisms will be put in place to ensure that they are able to participate in the development of the work programme and contribute to the evaluation of its outcomes.

- Projects funded under EQUAL are intended to be ‘test-bed’ activities, where innovative activities are tried and tested on a transnational partnership basis. A key aim of EQUAL is to feed lessons learnt from individual projects or group of projects into the policy process at the local, national or European level – a process known as mainstreaming. Mainstreaming can take place at two levels:
  - Horizontally - aimed at the DPs, partners and other local or regional agencies with similar interests, and commonly focusing on practical lessons;
  - Vertically - aimed at influencing national policy, with the role of intermediaries being important in the transference of key lessons.

Mainstreaming is not the same as dissemination, although this is an important part of the mainstreaming process. Mainstreaming refers to the actual use of project findings and the adoption of new practice whereas dissemination relates to publicising lessons by means of reports, events, thematic papers and project visits. EQUAL has been designed to give greater support to mainstreaming from the outset. Policy makers have been involved in identifying policy gaps in order to set priorities for EQUAL. They will also be involved throughout the life of the programme and have responsibility for ensuring that the Development Partnerships tackle areas and issues where there is real need for support. They also have a role in the mainstreaming process, to ensure that valuable lessons from project findings are able to influence the policy process.

- EQUAL puts a clear emphasis on transnational co-operation across Development Partnerships in EU Member States. During Action 1, each DP must produce a Transnational Co-operation Agreement (TCA) with at least two DPs in EU Member States. In addition DPs can co-operate with countries funded under the PHARE, TACIS or MEDA programmes. Joint working with partners not involved in EQUAL may also be provided, provided that the DP can show that this partnership clearly adds value and that the external partner, to be known as an 'associated transnational partner', is able to provide its own funding. All DPs must include a substantial and effective element of transnationality throughout the life of the work programme. This could, for example, include joint development of methods and approaches to training and job creation, the exchange of trainers or trainees, the 'benchmarking' of successful partner countries' training and management systems, and the organisation of joint conferences and workshops. Priority will be given to those actions, which show clear potential for mainstreaming at European level – e.g. the production of a training package or qualification or training of trainers. Priority will not be given to DPs where transnationality is confined to trainee exchanges. Exchange of information and experience: here partners do not explicitly define joint objectives for co-operation, rather inform each other of the projects they are implementing and the labour market, policy and institutional context within which they operate. This approach represents the typical starting point for transnational co-operation but would not be sufficient to receive funding under EQUAL. Such an approach would be expected to lead to the development of joint objectives and a joint work programme. Import, export or adoption of new approaches and their adaptation: this is a variant of the previous model and occurs when a more or less complete solution to the problem being tackled is identified among the transnational project partners. Transnationality enables exchange of best practice. Innovation occurs through the transfer of specific procedures or solutions from one context to another. Care must be taken to ensure that these practices are adapted to the conditions prevailing in the
importing country. Joint development: this involves the development of innovative solutions through the division of tasks between partners. They should have a shared and focused idea of the outcome to be achieved and the amount of work necessary to reach mutual goals and clear objectives.

3.2 Linked activities:
- Even though this is the first time such a project is proposed the activities and measures under the projects CZ00-10.02 and CZ00-10.03 in many ways addressed the same priorities. This project will thus extend and deepen the activities of these projects.
- Other parties have undertaken some activities corresponding to the EQUAL Initiative in the Czech Republic. The labour offices implement in co-operation with other regional institutions specific projects focused on target groups relevant for EQUAL. Concrete example: project „Most“ implemented by the Labour Office in Most in co-operation with ASISTA Agency and training institutions in Most. The aim of this project was to help the young people with low qualification or without it to find a proper job.
- Another activities have been carried out within bilateral international co-operation. For example within the project managed by the partnership CEPAC Moravia in co-operation with a French partner (CEPAC Inter Soissons) the training courses focused on self-employment were developed and implemented in 17 districts of the country, mostly in Northern Moravia.

3.3 Results:

This technical assistance and grant scheme project addresses an AP priority aims to ensure the Czech Republic is fully prepared to participate in the EQUAL Initiative upon accession. EQUAL operates in 4 Actions, with Action 1 being the completion of the constitution of so-called Development Partnerships (DPs) consisting at least two participating organisations and the finalisation of their respective programme of activities. Action 1 will be completed by the end of May 2002 and is financed entirely by the Czech side. This project should result in the completion of the remaining Actions 2, 3 and 4. Phare co-financing of Action 2 should result in the full implementation by selected DPs of their respective work programmes, Action 3 should result in the establishment of national and international thematic networks of projects, the dissemination of best practice and expertise and use of new practices and findings from individual projects in the policy process at local or national level, and Action 4 should result in the establishment of the necessary implementing infrastructure allowing for training in the management of international partnerships, monitoring, evaluation, etc. Project components for Actions 2 and 3 should be implemented by means of grant schemes, with Phare co-financing per scheme not exceeding Euro 375,000 for Action 2 and Euro 200,000 for Action 3 and Action 4 by provision of technical assistance. Actions 4 is to run in parallel to Actions 2 and 3, the Phare funding for which is conditional on Czech co-financing. Implementation of this project should take account of the outputs of relevant activities financed under Access 99 and 2000.

3.4 Activities:

On 14 April 2000 the Commission adopted the Communication (COM(2000)853) establishing the guidelines for the Community Initiative EQUAL, stating the rules according to which the Initiative is implemented in all European Union Member States. The EQUAL Initiative is composed of the four main types of actions (for the timetable please, see Annex 2):

Action 1: The objective of Action 1 is to facilitate the creation or the consolidation of durable, effective Development Partnerships and to ensure that transnational co-operation will have a real added value. The time period available for this Action should not exceed 4 - 5 months.

Action 2: Implementing the work programmes of the Development Partnerships. This work programme would normally cover an initial period of 2 to 3 years.

Action 3: Networking, dissemination of good practice and expertise and mainstreaming activities within EQUAL. It should facilitate maximum input into labour market and employment policy and should involve the social partners.

Actions 1 and 2 are sequential, while Action 3 should start as soon as results are available to disseminate.

Action 4 actually corresponds to ’Technical Assistance to support Actions 1, 2 and 3’.

Action 4: Actions 2 and 3, accompanied by Action 4, which are supposed to be co-financed by the Phare grant, comprise the following activities:
- Structured joint field and desk work of various institutions of different type and status grouped in the Czech Development Partnerships leading to developing products allowing achieving the results concentrated on piloting new and innovative methods and approaches to training and re-qualifications;
- Testing the results to allow their readiness for implementation with the use of either national funds or, if applicable, mainstream European Social Fund;
• Dissemination of both the results and examples of good practice at regional, national and European levels;
• Mutual learning process of Czech and EU Development Partnerships in frame of Transnational Partnership Agreements leading to solving similar problems by their joint work and benefiting from international experience in combating discrimination on European labour markets;
• Valorisation - valorisation is a process the aim of which is to make the best of results / outcomes of the projects. A part of valorisation is, for example, dissemination of information and of the results of the projects, and mainstreaming as a validation of the projects results in policy making and in strategy of development on national and regional levels.
• The Czech DPs are to operate in framework of the same rules and objectives as those applicable to the EU ones, including their participation in required international co-operation in frame of transnational agreements.

Selection process will follow the provisions of the Practical Guide to Phare, Ispa & Sapard contract procedures.

3.4.2 Means:
• Action 2: 9 to 12 grant contracts with Development Partnerships of up to EUR 750,000 per project including co-financing from the Ministry of Labour and Social Affairs. Each of selected Development Partnerships will be provided with a grant for a period of maximum 30 months. This Action is to be devoted to implementation of work plans and transnational agreements, which are to be developed during Action 1. During Action 2 Development Partnerships will concentrate their activities on international co-operation, fieldwork and deskwork. The activities furthermore will include testing of results and dissemination. Action 2 will start in July 2002 and it will finished before the end of 2004 – total foreseen budget MEUR 6,65;
• Action 3: 4 to 5 grant contracts with Development Partnerships of up to EUR 400,000 per project, including co-financing from the Ministry of Labour and Social Affairs, for networking, dissemination of good practice and expertise and mainstreaming activities within EQUAL for a period of 12 months. It should lead to valorisation of foreseen outcomes both at national and European levels. It should furthermore facilitate maximum input into labour market and employment policy and should involve the social partners. Action 3 will involve only the most successful Development Partnerships from Action 2 and will start during the second half of 2003. It will end together with Action 2 by the end of 2004 – total foreseen budget MEUR 0,95;
• Action 4: 1 contract for 5% of the total grant contracts amount for support of building and implementation of international co-operation of Czech and EU Development Partnerships, training in management of international partnerships, monitoring and evaluation of the programme and individual projects, analysing programme impact and publicising its goals and results including publication activities and web presentation. It will correspond with the implementation structures, which will include all the elements required by the European Commission for the EQUAL Initiative implementation, i.e. Monitoring Committee, National Support Structure, and Evaluation Team. They all are supposed to act in a way that allows building experienced organisational infrastructure for the programme functioning after the EU enlargement. Action 4 will run simultaneously to Actions 2 and 3 and will end by the end of April 2005 – total foreseen budget MEUR 0,4.

Phare contribution for each contract will be 50%, the other 50% will be provided by local co-financing.

4. Institutional Framework
Ministry of Labour and Social Affairs (MoLSA)
The Ministry of Labour and Social Affairs is in charge of labour market, occupational safety, employment and social policy and together with the Ministry of Education, Youth and Sports in charge of training and requalification. The Czech Government decision No. 159 of 4th March 1997 entrusted MoLSA with administration of the European Social Fund, which the EQUAL Initiative is a part of. The Employment Services Administration section is in charge of designing and implementing employment policy and managing the Employment Services Network consisting of 77 District Labour Offices.

Monitoring Committee of the EQUAL Initiative in the Czech Republic (MC)
On the basis of the Deputy Prime Minister decision No. 701/25922/2001 of June 18th, 2001 the MC was established. The MC was created for the purpose of the EQUAL Initiative management in the Czech Republic. The MC statute, including tasks and members is attached as the Annex 4.

National Training Fund (NTF), National Support Structure (NSS)
National Training Fund, public benefit organisation, which is the host organisation for the EQUAL Initiative National Support Structure on the basis of the Deputy Prime Minister decision No. 701/25922/2001, is a non-profit organisation established by the Ministry of Labour and Social Affairs in conformity with the regulations of
the Czech Republic law number 248/1995. The National Support Structure is a new section of the NTF specifically set up with purpose of assuring implementation of the EQUAL Initiative in the Czech Republic. The National Training Fund objectives are to provide services in management of projects leading to strengthening of human resource development and employability in the Czech Republic, to support use and administration of the European Union Structural Funds and to enhance transformation and European integration of Czech society and economy.

5. Detailed Budget (M €)

Distribution of funds among individual NUTS II will depend on quality of project proposals and results of selection process. For ensuring potential impact of the Special Programme and complementarities with foreseen allocations after the enlargement, the budget of MEUR 8 will be allocated from the pre-structural sources. It will be distributed in frame of foreseen grant structure, which is to be developed in accordance with the overall EU rules for the EQUAL Initiative. The funds are to be broken down according to the common European principle of sharing among individual actions: Action 1 (to be entirely financed by the Ministry of Labour and Social Affairs), Action 2: 83%, Action 3: 12% and Action 4: 5%.

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<tr>
<th>Project Component</th>
<th>Phare Support</th>
<th>National Co-financing</th>
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<tbody>
<tr>
<td></td>
<td>Investment Support</td>
<td>Institutional Support</td>
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<tr>
<td>Grant Scheme</td>
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<td>3.8</td>
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<tr>
<td>Technical Assistance</td>
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<td>0.2</td>
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<tr>
<td>Total</td>
<td>3.8</td>
<td>0.2</td>
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There will be joint co-financing.
- The grants will be provided to individual Development Partnerships according to their work plans and work load foreseen for individual partner institutions and foreseen plans for transnational co-operation and quality of project proposals;
- Eligible costs for the EQUAL Initiative (all must be directly linked to project activities specified in its work-plan):
  1. Staff costs (in accordance with pay slips and time sheets, possible use of staff categories ceilings possible);
  2. International travel costs (according to the Czech (ceiling) and individual institution rules;
  3. Local travel and subsistence;
  4. Production costs including subcontracting if necessary (subcontract agreements subject to prior NSS approval);
  5. Rental;
  6. Hardware depreciation and software;
  7. Costs of compulsory external audit;
  8. Running costs.

6. Implementation Arrangements

The programme is to be implemented in the whole country.

6.1. **Implementing Agency**
National Training Fund, Ms Miroslava Kopicová, Director, Opletalova 25, 110 00 Praha 1
tel.: +420 2 24500 500 / fax: +420 2 24500 501
PAO will be nominated Mr Miroslav Fuchs, Deputy Minister / Ministry of Labour and Social Affairs
Na Poříčném právě 1, 128 00 Praha 283

6.2. **Twining n/a**

6.2. **Non-standard aspects**

Implementation of the EQUAL Initiative will be undertaken with a principle of keeping all the procedures, including the contractual relations and payment systems as close to the common European regulations valid for all Member States participating in the programme as the Phare rules allow. Among other similarities use of the standard Transnational Co-operation Agreements forms, which are to be established and compulsory for all EU countries and use of the integrated database system for projects monitoring and management to be established by DG Employment is foreseen. Furthermore, as in all EU countries participating in the programme the contractual
and financial rules are to be kept similar to the ones which are binding for the mainstream European Social Fund actions, respectively to the Phare actions currently undertaken in the Czech Republic as a step towards its preparation for the ESF implementation. Twinning is not foreseen for this programme.

6.3. Contracts

(1) **Grant Scheme** for the following actions:
   - **Action 2**: 9 to 12 contracts with selected Development Partnerships of up to 0,750.0 M € per project;
   - **Action 3**: 4 to 5 contracts with selected Development Partnerships of up to 0, 400. M € per project.

(2) **Service contract** – 0,4 M €

7. Implementation Schedule

**Action 1 (subject to the MoLSA financing)**
Start of tendering/call for proposals
Call for proposals for Action 1: 1st November 2001
Deadline for projects' submission: 30th November 2001
Start of project activity: 2nd January 2002
Project Completion: May 2002

**Action 2 (subject to the Phare co-financing)**
Start of tendering for Action 2:
Call for proposals for Action 2: 2nd January 2002
Deadline for projects' submission: May 2002
Start of projects activity: July 2002
Projects Completion: 31st December 2004

**Action 3 (subject to the Phare co-financing)**
Start of tendering for Action 3:
Call for proposals for Action 3: 2Q 2003
Deadline for projects' submission: 3Q 2003
Start of projects activity: 4Q 2003
Projects Completion: 31st December 2004

**Action 4 (subject to the Phare co-financing)**
Start of tendering for Action 4:
Start of project activity: 2Q 2003
Project Completion: 2Q 2005

8. Equal Opportunity

Equal opportunity principles and practices in ensuring equitable gender participation in the project will be guaranteed.

9. Environment
n.a.

10. Rates of return
n/a

11. **Investment criteria**
n/a

12. Conditionality and sequencing
The EQUAL Initiative, as described in the chapters above, is functioning in frame of specific Actions, which continually transfer from one to another. The Action 1 and Ex-ante evaluation, which are entirely financed by the Ministry of Labour and Social Affairs, lead to creation of necessary basis for the following Actions implementation. Action 3 builds upon interim results of Action 2. Therefore only achievement of high quality performance both at the stage of Action 1 and the first half of Action 2 allows possibility of successful
implementation of Action 3. This will require good co-operation of all involved actors, efficient functioning of the EQUAL Initiative Monitoring Committee, National Support Structure and most of all Czech partners involved into projects implementation.

ANNEXES TO PROJECT FICHE

1. Logical framework matrix in standard format;
2. Detailed implementation chart;
3. Contracting and disbursement schedule by quarter for full duration of programme (including disbursement period);
4. European Initiative EQUAL in the Czech Republic Monitoring Committee's Statute;
5. Equal priorities for Action 1 in the Czech Republic.
### LOGFRAME PLANNING MATRIX FOR

**Project: EQUAL Initiative**

<table>
<thead>
<tr>
<th>Overall objective</th>
<th>Objectively verifiable indicators</th>
<th>Sources of Verification</th>
</tr>
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<tbody>
<tr>
<td>To enable the Czech Republic to take the obligations of membership, including adherence to the aims of political, economic and monetary union.</td>
<td>Acknowledgement by the European Commission</td>
<td>EC Regular Report and other relevant documents</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Project purpose</th>
<th>Objectively verifiable indicators</th>
<th>Sources of Verification</th>
<th>Assumptions</th>
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<tbody>
<tr>
<td>The Czech Republic is prepared for the implementation of the European Social Fund, particularly the EQUAL initiative.</td>
<td>Functioning of institutional framework and existence of absorption capacity for the European Social Fund implementation, EQUAL Initiative in particular, as a preparation of the Czech Republic for the EU enlargement including developed structures, procedures and tools for implementation of the EQUAL measures including necessary documentation, instructions and information materials – European Call for proposals 2004, if the enlargement takes place prior to it; Effectiveness of developing partnerships, within the employment, administrative, training and consultancy structures; Number and quality of projects submitted and number of Transnational Partnership Agreements established by the Czech Development Partnerships under the first call for proposals after the EU enlargement - European Call for proposals 2004, if the enlargement takes place prior to it; Readiness of employment services and other key players in the field of employment to start implementation of EQUAL Initiative after enlargement - European Call for proposals 2004, if the enlargement takes place prior to it; General awareness of the EQUAL Initiative and combating inequality in access to labour market in the Czech Republic.</td>
<td>MoLSA statistics and reports</td>
<td>Other parts of the acquis implemented and enforced to fulfil the 3rd Copenhagen criteria</td>
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**Project number:**

2002/000-282.08.02

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<th>Contracting period expires</th>
<th>Disbursement period expires</th>
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<td>31/10/2004</td>
<td>31/10/2005</td>
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**Total budget:**

8 M €

**Phase budget:**

4 M €
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<tr>
<th>Results</th>
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<tr>
<td>Development and implementation of new ways of combating all forms of discrimination and inequalities faced by those most disadvantaged in the labour market and those seeking work, through transnational co-operation by creating <strong>new training materials</strong> (training courses and methodologies, workbooks, training software, diagnostics tools (e.g. tests), etc.); <strong>Methodologies</strong> for new forms of employment of disadvantaged groups supported by innovative methods for <strong>guidance and information activities</strong> corresponding to specific needs of target groups leading to their better access to job market; <strong>Innovative methods for identification, contacting and registration</strong> of members of groups disadvantaged on the labour market in order to improve their employability; <strong>Networking</strong> of state authorities and social partners with NGOs and training institutions in joint effort to combat discrimination of the target groups and establishment of dialogue and co-operation between various players dealing with disadvantaged groups.</td>
<td>9 to 12 <strong>Czech Development Partnerships</strong> involving at least 50 <strong>Czech institutions</strong> in process of tackling at least three of nine themes of the programme – June 2002; 9 to 12 <strong>Transnational Partnerships</strong> involving Czech institutions in joint effort for mutual co-operation on solving problems of disadvantaged groups on both national and European labour markets – June 2002; 3 to 6 <strong>thematic networks involving at least 50 Czech institutions</strong> corresponding to the programme themes, associating multi-type players from all regions of the Czech Republic assuring basis for submission of new bids for Development Partnerships for the next call for proposals – December 2003; <strong>Innovative training materials</strong> (approximately 100 different outcomes for 50 courses) and methodologies (from 8 to 15) created by the Czech Development Partnerships in co-operation with foreign partners – January 2005; 1000 to 1500 <strong>representatives of target groups trained</strong> during testing process of training materials and methodologies. The number of beneficiaries is to increase significantly during the outcomes implementation after finalisation of the projects which is beyond the scope of this contract and is supposed to be a subject for other means of financing (e.g. mainstream ESF) – January 2005.</td>
<td>Mid term and final reports of the Czech Development Partnerships; Monitoring reports of the National Support Structure; Evaluation Team ongoing evaluation results; Evaluation Team final analysis of the results including recommendations for the second call for proposals. Phare monitoring and interim evaluation reports.</td>
<td>Co-ordination with any other relevant Phare projects, e.g. the grant scheme Access 2000 and any future years (run by NROS), HRD ESC grant schemes 2000 and beyond, and civil society development grant schemes run by NROS; The Czech Republic joins the European Union in the course of the EQUAL Initiative (by the end of 2006); Availability of high quality Czech projects and innovative ideas to be implemented in frame of the programme; Presence and willingness of experienced and capable Czech institutions to be involved into the programme; Development of the structures and implementation of the mainstream European Social Fund in the Czech Republic; The European Commission equal treatment of the Czech participation in the pre-accession phase in terms of international co-operation of Development Partnerships and involvement of the Czech Republic representatives in the programme management at the European level.</td>
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<tr>
<td>Activities</td>
<td>Means</td>
<td>Assumptions</td>
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<tr>
<td>• Structured joint field and desk work of various institutions of different type and status grouped in the Czech Development Partnerships leading to <strong>developing products</strong> allowing achieving the results concentrated on piloting new and innovative methods and approaches to training and re-qualifications;</td>
<td>• <strong>Action 2</strong>, 9 to 12 grant contracts with Development Partnerships of up to EUR 750,000 per project including co-financing from the Ministry of Labour and Social Affairs. Each of selected Development Partnerships will be provided with a grant for a period of max 30 months. This Action is to be devoted to implementation of work plans and transnational agreements, which are to be developed during Action 1. During Action 2 Development Partnerships will concentrate their activities on international co-operation, fieldwork and deskwork. The activities furthermore will include testing of results and dissemination. Action 2 will start on July 2002 and it will end by the end of 2004 – total foreseen budget <strong>MEUR 6,65</strong>;</td>
<td>• Ministry of Labour and Social Affairs co-finances the Actions 2, 3 and 4 by 50% of their total costs (i.e. 4 MEUR in total);</td>
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<td>• <strong>Testing the results</strong> to allow their readiness for implementation with the use of either national funds or, if applicable, mainstream European Social Fund.</td>
<td>• <strong>Action 3</strong>, 4 to 5 grant contracts with Development Partnerships of up to EUR 400,000 per project, including co-financing from the Ministry of Labour and Social Affairs, for networking, dissemination of good practice and expertise and mainstreaming activities within EQUAL for a period of 12 months. It should lead to valorisation of foreseen outcomes both at national and European levels. It should furthermore facilitate maximum input into labour market and employment policy and should involve the social partners. Action 3 will involve only the most successful Development Partnerships from Action 2 and will start during the second half of 2003. It will end together with Action 2 by the end of 2004 – total foreseen budget <strong>MEUR 0.95</strong>;</td>
<td>• Availability of high quality outcomes of Development Partnerships developed during the first phase of Action 2 justifying implementation of Action 3 measures in the Czech Republic.</td>
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<td>• <strong>Dissemination</strong> of both the results and examples of good practice at regional, national and European levels;</td>
<td>• <strong>Action 4</strong>, 1 service contract for 5% of the total grant contracts amount for support of building and implementation of international co-operation of Czech and EU Development Partnerships, training in management of international partnerships, monitoring and evaluation of the programme and individual projects, analysing programme impact and publicising its goals and results including publication activities and web presentation. It will correspond with the implementation structures, which will include all the elements required by the European Commission for the EQUAL Initiative implementation, i.e. Monitoring Committee, National Support Structure, and Evaluation Team. They all are supposed to act in a way that allows building experienced organisational infrastructure for the programme functioning after the EU enlargement. Action 4 will run simultaneously to Actions 2 and 3 and will end by the end of May 2005 – total foreseen budget <strong>MEUR 0.4</strong>.</td>
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<tr>
<td>• <strong>Valorisation</strong> of the results by decision-makers. Valorisation is a process the aim of which is to make the best of results / outcomes of the projects. A part of valorisation is, for example, dissemination of information and of the results of the projects and mainstreaming as a validation of the project results in policy-making and in strategy of development on national and regional levels.</td>
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<td>• <strong>Mutual learning process of Czech and EU Development Partnerships in frame of Transnational Partnership Agreements</strong> leading to solving similar problems by their joint work and benefiting from international experience in combating discrimination on European labour markets;</td>
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<td>• The Czech Development Partnerships are to operate in framework of the same rules and objectives as those applicable to the EU ones, including their participation in required <strong>international co-operation</strong> in frame of transnational agreements.</td>
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Preconditions

EQUAL as a part of the European Social Fund is an initiative which tests and promotes new means of combating all forms of discrimination and inequalities in the labour market, both for those in work and for those seeking work, through transnational co-operation. EQUAL also includes action to help the social and vocational integration of asylum seekers. EQUAL operates across identified thematic fields, which embrace the four pillars of the European Employment Strategy and support for asylum seekers. EQUAL funds activities implemented by strategic partnerships called Development Partnerships (DPs). Each DP consists of at least two organisations. EQUAL operates in 4 stages called Actions. Action 1 is the first phase during which Development Partnerships finalise their constitution and prepare their programme of activities. In the Czech Republic Action 1 starts on 2nd January 2002 and finishes on May 2002. Actions 2, 3 and 4 are standard Actions as in all EU Member States.

The preparatory phase that preceded Action 1 included elaboration of a comprehensive ex-ante evaluation, preparation of all relevant information materials, organising of a launch conference for the organisations and experts approved by the Monitoring Committee and instructing and assisting potential project proposal submitters. The 2nd Monitoring Committee session on 31st October 2001 decided on priorities the Czech Republic will pursue during the first phase of EQUAL and selected relevant broad themes on which project proposal could be submitted.

Action 1, 20grant contracts with Development Partnerships of 200.000 CZK (approx. EUR 6000) per project fully financed by the Ministry of Labour and Social Affairs. Each of selected Development Partnerships will be provided with a grant for a period of 3 months. This Action is devoted to finalisation of DP’s constitution and preparation of their programme of activities, already presented in outline to secure initial recognition as a Development Partnership. The implementation of preparatory phase and Action 1 is assured by the National Training Fund. Assuring financing of the preparatory phase of the programme implementation, including ex-ante evaluation, programme management and Action 1, throughout the year 2001 and the first half of 2002 by the Ministry of Labour and Social Affairs and implementation of Action 1 is a precondition for successful implementation of the Project.

Projects in the EQUAL Initiative in the Czech Republic will support achievement of priority objectives of the National Employment Plan (Government resolution no. 418 of 5th May 1999) and of annual National Action Employment Plans (e.g. for 2001 approved by the Government resolution no. 165 of 19th February 2001). Co-ordination will be eased by the fact that priorities of employment support are in these documents specified in concrete measures / actions divided into 4 groups according to 4 pillars of the European Employment Strategy similarly to EQUAL Initiative priorities.
Detailed Implementation Chart for the Project

<table>
<thead>
<tr>
<th>Year</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
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<td><strong>Action 1</strong></td>
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<td>Call for proposals</td>
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<tr>
<td>Tendering</td>
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<tr>
<td>Assessment and selection</td>
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<tr>
<td>Contracting</td>
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<tr>
<td>Projects Implementation</td>
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<tr>
<td><strong>Action 2</strong></td>
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<td>Call for proposals</td>
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<td>Call for proposals</td>
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<td>Tendering</td>
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<tr>
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<td>Projects Implementation</td>
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<td>Final reports</td>
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## Contracting and Disbursement Schedule by Quarter for Full Duration of Programme

### Annex 3

#### Cumulative Quarterly Contracting Schedule (MEUR)

<table>
<thead>
<tr>
<th>Project</th>
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<th>2003</th>
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<th>2005</th>
<th>Total</th>
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<td>2Q</td>
<td>3Q</td>
<td>1Q</td>
<td>2Q</td>
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#### Cumulative Quarterly Disbursement Schedule (MEUR)

<table>
<thead>
<tr>
<th>Project</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4Q</td>
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<td>2Q</td>
<td>3Q</td>
<td>1Q</td>
<td>2Q</td>
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<td>3.827</td>
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</tbody>
</table>
European Initiative EQUAL in the Czech Republic Monitoring Committee’s Statute

Article 1
Introduction

1. The Ministry of Labour and Social Affairs on basis of
a) the decision of the Minister of Labour and Social Affairs of 18th June 2001 (701/25922/2001) concerning the Czech Republic participation in the Community Initiative EQUAL and
b) Based on Article 35 of the Council (EC) Regulation on 21st June 1999 (Council Regulation 1260 / 1999) on general regulations which states:

"...each operational programme ... shall be supervised by a Monitoring Committee. The Monitoring Committee shall ensure the effectiveness and quality of the assistance implementation”, establishes the Monitoring Committee for the EQUAL Initiative in the Czech Republic (Committee) as the co-ordinating body for the implementation of the Community Initiative EQUAL in the Czech Republic.

Article 2
Scope of Committee’s activity

1. Supervising strategy for implementing the EQUAL Initiative and proposing steps to improve its functioning in the Czech Republic;
2. Approval of ‘TOR and of the ex-ante evaluation conclusions and recommendations for the evaluation strategy including appropriate indicators for monitoring and evaluating the programme;
3. Assurance of the funds availability for the projects (both the Phare and national co-financing) and for the National Support Structure;
4. Assurance of compliance of the programme priorities and actions with the goals of the ministry;
5. Approval of Call for Proposals for DPs, selection criteria and procedures for assessment and Development Partnerships and of Transnational Partnerships;
6. Approval of the National Support Structure annual Work Plans and reports;
7. Selection of project proposals evaluators and DP tutors;
8. Designation of MoLSA representatives to DP steering committees;
9. Involvement in the projects valorisation and dissemination activities including support for activities leading to promotion of the programme in the Czech Republic.

Article 3
Committee’s members

1. The Committee has a chairperson and 5 members.
2. The Chairperson (with voting rights) is the Deputy Minister from the Department for European integration and international relations and the Head of EQUAL Initiative Mission;
3. Committee’s Members are following:
   a) Director of Department for employment strategy and human resources development;
   b) Director of Department for counselling and intermediation;
   c) Director of Economical department;
   d) Director of Department for Equal Opportunities for men and women;
   e) Director of the NVF.

In well-founded cases the members may be substituted in the Committee’s proceedings.
4. Apart from the Committee members, following persons are invited to the Committee’s proceedings:
   a) Representative of the European Commission, DG Employment;
   b) Representative of the EC Delegation in the Czech Republic;
   c) Representative of the Centre for Foreign Assistance - Ministry of Finance;
   d) Representative of the EQUAL National Support Structure.

Article 4
Chairperson’s and his secretariat’s activities

1. The Chairperson will preside over the Committee;
2. The Committee Chairperson’s department in co-operation with the National Support Structure executes permanent activities of the secretariat that is responsible for overseeing the preparation of documents for the Committee’s proceedings and for Committee’s approval procedures;
3. The Chairperson calls for the Monitoring Committee meetings at least 3 times a year;
4. The Chairperson will draw agendas for meetings. Members may request inclusion of particular items in writing to the Chairperson – such requests shall normally be submitted at least 5 working days before the meeting;
5. The invitation to the meetings and agenda should be sent at least 7 working days before the meeting;
6. Minutes of the meeting will be produced by the National Support Structure and after approval by the Chairperson sent to members within 10 working days after the meeting.

Article 5

Conclusions
1. It is expected that decisions will be made by consensus. In the case of disagreement, it will be for the Chairperson, using appropriate channels, to seek resolve differences according to the attached Rules of Procedure;
2. The Chairperson may decide to discuss some urgent issues and proposals *per rolam* (by mail, fax or e-mail) if it is not possible or useful to call a Committee meeting to discuss them and if the nature of these issues admits such a procedure;
3. The Statute enters into force on the day of its approval by the Minister of Labour and Social Affairs.
Equal priorities for Action 1 in the Czech Republic

The priorities, which are listed below, have been identified by national ex-ante evaluation study and published in the Call for Proposals for Action 1 in order to mainstream Czech project proposals.

**Theme A**
1.1 Creation of a system for prevention and support for young people prematurely leaving initial education;
1.2 Reactivation, innovative measures and support approaches in integration of the long term unemployed, low qualified and marginalised groups on the labour market;
1.3 Support for integration of people with disabilities into the open labour market;
1.4 Complex guidance, training and assistance in employment to members of the Roma minority;

**Theme B**
2.1 Support for multicultural environment and education in the Czech society;

**Theme C**
3.1 Training and guidance for the new starters and self-employed;

**Theme D**
4.1 Systemic development and diversification of services of the third sector;

**Theme E**
5.1 Systemic and innovative development of lifelong learning for integration of disadvantaged groups into the labour market;
5.2 Regional centres of training of adults;
5.3 Job rotation and job sharing;

**Theme F**
6.1 Development of SMEs through their networking and strengthening links with large companies;
6.2 Integration programmes for redundant employees in large companies under restructuring;

**Theme G**
7.1 Support for introduction of flexible forms and modern methods of employment with a special emphasis on women;
7.2 Development of social care services and other local and community services allowing harmonisation of work with family life (with engagement of the unemployed into the work);
7.3 Reintegration onto the labour market, particularly women returning to the labour market, including support in access to ICT;