STANDARD SUMMARY PROJECT FICHE

1. Basic Information

1.1 Désirée Number: 2002/000-282.08.03

1.2 Title: Preparation of the National Action Plan on Social Inclusion

1.3 Sector: Employment, Social Affairs, Health

1.4 Location: Czech Republic

2. Objectives

2.1 Overall objective
To enable the Czech Republic to take the obligations of membership, including adherence to the aims of political, economic and monetary union and contribute to the improvement in the area of free movement of persons.

2.2 Project purpose
Preparation of the National Action Plan on Social Inclusion (NAPSI) and draft Joint Inclusion Memorandum (JIM) in order to support social inclusion - especially unemployed, disabled and other vulnerable groups. This process must comply with the Public Administration Reform conception and must meet the requirement of solidarity and achieve active welfare state that strongly encourages participation in the labour market.

2.3 Accession Partnership and NPAA priority
AP (1999): Medium term, political criteria:

strengthen policies and budgetary means, at national and local levels, to continue improving the situation of the Roma.

NPAA (2001): 1.2 Human Rights and the protection of minorities

1.2.2. Economic, Social and Cultural Rights - Medium - Term Priorities

The application of the policy of equal opportunities for men and women, in accordance with the Government - approved and annually update document "Government priorities and procedures in achieving equality between men and women".

1.2.3. Minority Rights and the Protection of Minorities - Medium - Term Priorities

In connection with the approval of the Act on the Rights of National Minorities, it is anticipated that the Government will adopt a regulation on the provision of subsidies from the state budget for activities by national minorities. The regulation is also aimed at the incorporation of a specific indicator, "support programme for activities by national minorities", into the state budget.

3.6.1.1.4. Discrimination

The Czech Republic will consider in 2001 the possibility of joining the Community action programme to combat discrimination (as announced by 2000/750/EC: Council Decision of 27 November 2000); The Czech Republic will also consider in 2001 the possibility and ways of getting involved in the Community initiative EQUAL bearing on international (cross-border) cooperation to promote new ways of combating all forms of discrimination and inequality on the labour market (pursuant to the Directives included in the Communication from the Commission of 2000).

3.6.1.1.9. Information Systems and Employment Statistics

Pilot testing of the new active employment policy statistics that allow for better assessment of the tools and measures deployed is supposed to be launched.

3.6.1.2.9. Information Systems and Social Affairs Statistics

Complete a functional informational system, which includes ESSPROS Basic System. Create a database of ministry-specific and non-ministerial statistical indicators in the area of social security according to the concept that is binding in the EU for the purpose of exchange of statistical data. Produce macro and support analyses, forecasts, quarterly indicators and inputs for EU databases.

3.6.1.3.1.1B needs - MOLSA

The process of preparing the Ministry for accession to the European Union is managed and coordinated by the European Integration and International Relations Section which has 27 workers, and especially by its community programmes division, which employs 4 workers. The division will hire one additional worker to handle mostly the issues of social security and discrimination in EU policies.
2.4 Contribution to National Development Plan  
n.a.

2.5 Cross Border Impact  
n.a.

3. Description

3.1 Background and justification
Anti-discrimination policy is closely linked to the fight against social exclusion. The main victims of poverty and unemployment are those population groups which are often targets of rejection or discrimination. They include women, older people and the disabled. Number of people falling through the net has been increasing. Such people are dependent on State benefits or charity.

European Social Model via its developed systems of social protection must support transformation towards more positive and dynamic interaction among economic, employment and social policies. This approach has to strengthen the role of social policy as a productive factor and its effectiveness in protection of individuals, eliminating inequalities and strengthening social cohesion. This approach also envisages higher participation of disadvantaged groups in the labour market.

Among others, the important goals of social policy are strengthening the relation between the professional and family life, addressing the ageing of population, support of elderly employees, full integration and employment of handicapped, reform of systems in order to make them motivating to work instead of living on social benefits.

Important factors in this process are effective partnership with NGOs, social partners, regional and local institutions, municipalities, relation to the employment and economic policies.

At its summit in Nice (December 2000) the European Council approved the European Social Agenda which defines in accordance with the Lisbon European Council conclusions and on the basis of the Commission communication specific priorities for action for the next five years around six strategic orientations in all social policy areas. This Agenda constitutes a major step towards the reinforcement and modernisation of the European social model, which is characterised by the indissoluble link between economic performance and social progress.

Social cohesion, the rejection of any form of exclusion or discrimination and gender equality are all essential values of the European social model and were reaffirmed at the Lisbon European Council. Employment is the best protection against social exclusion. Growth should benefit all, but for this to be so, proactive measures, especially in problem districts, should be continued and stepped up to deal with the complex nature and multiple facets of exclusion and inequality. Alongside employment policy, social protection has a fundamental role to play, but it is also necessary to recognise the importance of other factors such as housing, education, health, information and communication, mobility, security and justice, leisure and culture.

European Council at its summit in Stockholm (March 2001) stressed the positive role of well functioning social systems and need of modernisation of European social system based on European Social Agenda adopted in Nice. The Council also asked the Member States to include fight against poverty and social exclusion high among their priorities.

3.2 Linked activities
- Parallel proposal for Phare 2002 aimed towards Czech participation in the Community Initiative EQUAL. The EQUAL Initiative, being a part of the ESF, is to test and promote new ways of combating all forms of discrimination and inequalities faced by those groups most disadvantaged in the labour market, both those in work and those seeking work, through transnational co-operation. Target groups include women, ethnic minorities, people with disabilities, older workers, refugees, graduates, ex-offenders, drugs and alcohol misusers, etc.
- Projects in the field of Equality between men and women - Czech projects within the 4th Community Action Programme on Equality between men and women.
- Phare 2001 Project CZ01.08.01 Equal Treatment for Men and Women. The project objectives are to assist the Czech Republic to comply with its obligations under Community Law and Policy regarding Equal Opportunities for men and women and to transform and improve the existing institutional structure and systems dealing with equal opportunities in order to fully apply, enforce and monitor the relevant EC acquis by the time of Accession.

3.3 Results
A comprehensive package of proposals and recommendations within the framework of a National Strategy for the development of social services, including:
a) Analysis of current EU policies on Social inclusion and fight against poverty and preparation of the Czech National Action Plan on Social Inclusion (NAPSI) and draft Joint Inclusion Memorandum (JIM);
b) Development of training policy and training programmes for social services providers with the stress to life-long learning;
c) Improvement of social services quality by introduction of social services standards and quality assessment (self assessment methodology, social inspection etc.);
d) Reform of health assessment services especially in relation to employment, pension and social welfare benefits;
e) Comparison of reasons leading to the recognition of disability between the Czech system and EU systems;
f) Reform of contributory and non-contributory benefits system for persons with disabilities;
g) Creation of independent statistical module in compliance with the methodology of European system of unified statistics of social protection.

3.4 Activities

I. Twinning (0.59 M€):
   a) analyse the current EU policies on Social inclusion
   b) contribute to the preparation of the Czech National Action Plan on Social Inclusion (NAPSI) and draft Joint Inclusion Memorandum (JIM);
   c) suggest steps for the reform of health assessment services especially in relation to employment, pension and social welfare benefits;
   d) compare reasons leading to the recognition of disability between the Czech system and EU systems;
   e) propose options for the reform of the contributory and non-contributory benefits system for persons with disabilities;

Twinning Covenant will include:
   · 1 PAA for 15 months for analysis of current EU policies on social inclusion and fight against poverty; he/she must have minimum 5 years practical experience in the field which will be covered by this project.
   · Total of 12 man-months of ST expertise: for delivering the project outputs; all ST experts should be specialised in specific field (e.g. health assessment services, statistics, unemployment benefits, etc.);

II. Technical Assistance (0.16 M€)
   a) develop a training policy and training programmes for social services providers;
   b) improve the quality of social services and introduction of social services standards and quality assessment;
   c) create an independent statistical module in compliance with the methodology of European system of unified statistics of social protection.

3.5 Lessons learned
The conclusions and recommendations of recent monitoring reports have been considered within the preparation of this project.

4. Institutional Framework

Ministry of Labour and Social Affairs (MoLSA)

MoLSA is a central department of the State administration and is responsible for labour relations, occupational safety, employment and training, collective bargaining, civil service, wages and other forms of remuneration, pensions and sickness insurance, social protection, family and child affairs, care for vulnerable groups and other issues of wage and social policy. The number of MoLSA staff is ca 550 persons.

5. Detailed Budget (mil.€)

<table>
<thead>
<tr>
<th>Project Components</th>
<th>Phare Support</th>
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<th>IF1</th>
<th>TOTAL</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Investment</td>
<td>Institution</td>
<td>Total Phare (=I+IB)</td>
<td>National Cofinancing</td>
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<tr>
<td></td>
<td>Support</td>
<td>Building</td>
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<tr>
<td>Twinning Covenant</td>
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<td>0.59</td>
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<td>0.59</td>
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<tr>
<td>Technical assistance</td>
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<td>0.16</td>
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<td>0.16</td>
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<td>0.75</td>
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</table>
6. Implementation Arrangements

6.1 Implementing Agency
The CFCU will be the Implementing Agency. Project implementation will be under direct responsibility and co-ordination of the Ministry of Labour and Social Affairs

6.2 Twinning
1 PAA for 15 months for analysis of current EU policies on social inclusion and fight against poverty; he/she must have minimum 5 years practical experience in the said field; the PAA will be located at MOLSA, Dpt. 22 - dpt. of social services.
Total of 12 man-months of ST expertise: for delivering the project outputs; all ST experts should be specialised in specific field (e.g. health assessment services, statistics, unemployment benefits, etc.).
Standard twinning arrangement is envisaged with MOLSA as the beneficiary institution.
The Contact person at MoLSA is Mr Miroslav Fuchs, Deputy Minister of the European Integration and International Relations Section, Ministry of Labour and Social Affairs, tel. +420 2 2192 2668, fax +420 2 2492 1883, e-mail miroslav.fuchs@mpsv.cz.

6.3 Non-standard aspects
The Practical Guide to Phare,Ispa and Sapard contract procedures shall be followed.

6.4 Contracts
Contract 1: Twinning Covenant (0.59 MEUR)
Contract 2: Service Contract (0.16 MEUR)

Implementation Schedule

6.5 Start of tendering/call for proposals: Twinning 2Q/2002
TA 3Q/2002
6.6 Start of project activity
TA 1Q/2003
Twinning 4Q/2002
7.3. Project Completion
4Q/2004

7. Equal Opportunity
Equal opportunity principles and practice in ensuring equitable gender participation in the Project will be guaranteed.

8. Environment
n.a.

9. Rates of Return
n.a.

10. Investment Criteria
n.a.

11. Conditionality and Sequencing
This project will build upon the achievements of previous projects (see 3.2 above) and on effective partnership among all involved partners

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
# LOGFRAME PLANNING MATRIX

<table>
<thead>
<tr>
<th>Project title:</th>
<th>Programme number: <strong>2002/000-282.08.03</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparation of the National Action Plan on Social Inclusion</td>
<td>Contracting period expires: 31/10/2004 Disbursement period expires: 31/10/2005</td>
</tr>
<tr>
<td><strong>Beneficiary institution:</strong> MoLSA</td>
<td>Total budget: 0,75 mil.€ Phare budget: 0,75 mil.€</td>
</tr>
</tbody>
</table>

### Overall objective
- To enable the Czech Republic to take the obligations of membership, including adherence to the aims of political, economic and monetary union and contribute to the improvement in the area of free movement of persons.

### Objectively verifiable indicators
- The Czech Republic will be prepared for the implementation of the European Council conclusions from Lisbon, Nice and Stockholm in the field of social protection.

### Sources of Verification
- EC Regular Report and other relevant documents
- OECD reports

### Assumptions
- EU and National Statistics provided by EUROSTAT and Czech Statistical Office;
- Statistics reports and analyses of MoLSA;
- EC Regular Report and other relevant documents;
- OECD reports.

### Project Purpose
- Preparation of the National Action Plan on Social Inclusion (NAPSI) and draft Joint Inclusion Memorandum (JIM) in order to support social inclusion - especially unemployed, disabled and other vulnerable groups.

### Objectively verifiable indicators
- NAPSI and JIM available
- The systems operated in the Czech Republic are comparable with those currently operating in the EU by the date of accession of the Czech Republic to the EU;
- General awareness of supporting social inclusion by state increased by the date of accession of the Czech Republic to the EU;
- Quality of social services provided increased proved by the results of quality assessments (within the period of project implementation);
- The Czech Republic is prepared for the implementation of the European Council conclusions from Lisbon, Nice and Stockholm in the field of social protection by the date of accession of the Czech Republic to the EU.

### Objectively verifiable indicators
- EU and National Statistics provided by EUROSTAT and Czech Statistical Office;
- Statistics reports and analyses of MoLSA;
- EC Regular Report and other relevant documents;
- OECD reports.

### Assumptions
- EU and National Statistics provided by EUROSTAT and Czech Statistical Office;
- Statistics reports and analyses of MoLSA;
- EC Regular Report and other relevant documents;
- OECD reports. Public administration operations improved and prepared for EU accession;
- Further harmonisation of the steps towards the Nice and Stockholm conclusions and the European Union Common position (Brussels 16.5.2001), Chapter 13 Social Policy and Employment;
- Active and consistent co-operation of all involved institutions;
- This process must comply with the public administration reform conception and must meet the requirement of solidarity and achieve active welfare state that strongly encourages participation in the labour market;
- Other parts of the acquis
<table>
<thead>
<tr>
<th>Results</th>
<th>Objectively verifiable indicators</th>
<th>Sources of Verification</th>
<th>Assumptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A comprehensive package of proposals and recommendations within the framework of a National Strategy for the development of social services, including:</td>
<td>• Analysis elaborated and submitted;</td>
<td>• Project progress and final monitoring reports;</td>
<td>• All tasks under the umbrella of this project are effectively co-ordinated and all people involved are well informed;</td>
</tr>
<tr>
<td>a) Analysis of current EU policies on Social inclusion and fight against poverty and preparation of the Czech National Action Plan on Social Inclusion (NAPSI) and draft Joint Inclusion Memorandum (JIM) drafted;</td>
<td>• National Action Plan (NAPSI) and draft Joint Inclusion Memorandum (JIM) drafted and discussed with Czech partners;</td>
<td>• EC monitoring reports;</td>
<td>• Czech National Action Plan on Social Inclusion implemented</td>
</tr>
<tr>
<td>b) Training policy and training programmes for social services providers with the stress to life - long learning developed;</td>
<td>• Training programmes developed and training policy ready for implementation by 3.Q/2003;</td>
<td>• National Action Plan (NAPSI);</td>
<td>• Other recommendations and outputs of this project are implemented or continued.</td>
</tr>
<tr>
<td>c) Social services quality improved by introduction of social services standards and quality assessment (self assessment methodology, social inspection etc.);</td>
<td>• Social services standards defined and quality assessment ready for implementation by 3.Q/2003;</td>
<td>• Health assessment services redefined and institutionally ensured by the date of accession of the Czech Republic to the EU;</td>
<td></td>
</tr>
<tr>
<td>d) Health assessment services reformed especially in relation to employment, pension and social welfare benefits;</td>
<td>• Health assessment services redefined and institutionally ensured by the date of accession of the Czech Republic to the EU;</td>
<td>• Comparison of disability reasons drafted;</td>
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<tr>
<td>e) Reasons leading to the recognition of disability between the Czech system and EU systems compared;</td>
<td>• Options for reform of contributory and non-contributory benefits system for persons with disabilities submitted;</td>
<td>• Definition of the statistical module “Recipients of social protection benefits” prepared;</td>
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</tbody>
</table>
in compliance with the methodology of European system of unified statistics of social protection created;

b) National Strategy for Development of Social Services drafted.

c) analyse the current EU policies on Social inclusion.

d) contribute to the preparation of the Czech National Action Plan on Social Inclusion;

e) develop a training policy and training programmes for social services providers (TA);

f) improve the quality of social services and introduction of social services standards and quality assessment (TA);

g) suggest steps for the reform of health assessment services especially in relation to employment, pension and social welfare benefits;

h) compare reasons leading to the recognition of disability between the Czech system and EU systems;

i) propose options for the reform of the contributory and non-contributory benefits system for persons with disabilities;

h) create an independent statistical module in compliance with the methodology of European system of unified statistics of social protection (TA).

<table>
<thead>
<tr>
<th>Activities</th>
<th>Means</th>
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<tbody>
<tr>
<td>a)</td>
<td>(i) Twinning:</td>
</tr>
<tr>
<td>b)</td>
<td>1 PAA for 15 months for analysis of current EU policies on social inclusion and fight against poverty; he/she must have minimum 5 years practical experience in the said field;</td>
</tr>
<tr>
<td>c)</td>
<td>Total of 12 man-months of ST expertise: for delivering the project outputs; all ST experts should be specialised in specific field (e.g. health assessment services, statistics, unemployment benefits, etc.);</td>
</tr>
<tr>
<td>d)</td>
<td>Internships and Study Visits Up to 5 internships of key staff in MS’s in the main areas of the project;</td>
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<tr>
<td>e)</td>
<td>(ii) Technical Assistance TA - 8 man-months in total for delivering the project outputs provided by specialist firm(s) in the field of social protection and social inclusion. The services will be especially targeted to the creation of statistical module, provision of advice, consultations, seminars.</td>
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<tr>
<th>Assumptions</th>
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<tbody>
<tr>
<td>Partner offices for internships identified;</td>
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<tr>
<td>Internships agreed with MS institutions;</td>
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<tr>
<td>Key staff are correctly placed in terms of internships to partner institutions and relevance to their responsibility;</td>
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<tr>
<td>This project has links to running projects: CZ 9902.02 – Promoting Employability/Employment Measures;</td>
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<tr>
<td>Czech – British project - Support to MoLSA</td>
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</tbody>
</table>
Preconditions
- Finalise transposition of the equal treatment acquis; adopt legislation in line with the antidiscrimination acquis and prepare for its implementation. Member States draft their National Action Plans based on conclusions from Nice. Candidate countries are not required to draft them, nevertheless the Czech Republic plans to do so by 2003.
## Detailed Implementation Chart

<table>
<thead>
<tr>
<th>Action</th>
<th>Year 2002</th>
<th>Year 2003</th>
<th>Year 2004</th>
<th>Year 2005</th>
<th>Year 2006</th>
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<tbody>
<tr>
<td>Twinning Package</td>
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<tr>
<td>- Launch Twinning request to Member States</td>
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<tr>
<td>- Selection of MS(s) for twinning</td>
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<td>- Elaboration of twinning covenant</td>
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<tr>
<td>- Submit Twinning covenant to</td>
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<td>Commission &amp; Steering Committee for</td>
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<tr>
<td>approval</td>
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<tr>
<td>- Twinning Package commences</td>
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<td>Technical assistance</td>
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CONTRACTING AND DISBURSEMENT SCHEDULE BY QUARTER FOR FULL DURATION OF PROGRAMME

Cumulative Quarterly Contracting Schedule (mil.€)

<table>
<thead>
<tr>
<th>Project</th>
<th>1Q/02</th>
<th>1Q/02</th>
<th>3Q/02</th>
<th>4Q/02</th>
<th>1Q/03</th>
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<td>0,65</td>
<td>0,75</td>
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Cumulative Quarterly Disbursement Schedule (mil.€)

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<th>Project</th>
<th>1Q/02</th>
<th>1Q/02</th>
<th>3Q/02</th>
<th>4Q/02</th>
<th>1Q/03</th>
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