

Evaluation of the EU funds impact on implementation of Horizontal priority "Equal Opportunities" defined in planning documents

„ Project and quality management” and „ACCIPE!” Ltd.

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Executive summary

The main task of the evaluation report is to assess the impact and contribution of EU funds on horizontal priority “Equal Opportunities” (hereinafter – HP EO) set in planning documents.

To achieve the above-mentioned task, the analysis of HP “Equal Opportunities” impact on gender equality, equal rights for persons with disabilities and active ageing has been carried out. Analysis is based on the study of 1014 EU funds projects, including ESF, ERDF and CF projects and case studies of 21 EU funded projects at the project places as well as in-depth interviews with project implementers. In addition the evaluation characterizes potential risks that could hinder the implementation of HP “Equal Opportunities” and proposes recommendations for the improvement of the implementation of HP “Equal Opportunities” policy.

The results of the evaluation report reveal that the EU Structural funds’ management institutions have facilitated the implementation of horizontal priority, as well as increased awareness and understanding among both institutions and project applicants. However, the achievement of HP EO objectives is more successful in operational programmes in horizontal dissection where HP EO matters are more thoroughly discussed in order to avoid negative impact on gender equality, persons with disabilities and active ageing, than in specific, HP EO orientated activities.

The results of the evaluation bring about conclusions that activities based on the Supplement to the Operational Programme (hereinafter – SOP) directly or indirectly promote or have neutral impact on the implementation of HP EO in compliance with long-term objectives of the Community. However, shortcomings in supervisory system (lack of HP EO specific objectives, indicators or results) prevent sufficient evaluation of progress or results of HP EO implementation.

The assessment of EU funds contribution has been problematic because projects included in the evaluation have not defined the amount of financing invested in the implementation of HP EO policy.

HP EO indicator set by the National Strategic Reference Framework does not reveal completely EU funds’ impact on HP EO because employment level in the country depends on many other factors, for example, economic situation of the country, high unemployment level and small number of workplaces registered in the State Employment Agency.

It is difficult to assess progress or results of HP EO because specific HP EO objectives, indicators or results were not set at the beginning of 2007 – 2013 planning period.

Analysis of HP EO impact on gender equality brings about a conclusion that SOP activities do not have vertical impact on gender equality, namely, activities aimed at promoting gender equality by resolving specific problems have not been carried out and financial resources for such purposes have not been assigned. However, the implementation of European Pact for Gender Equality is ensured by enlarging other SOP activities thus ensuring horizontal approach in order to establish friendlier

workplace environment, work-family harmony, decrease professional segregation and improve accessibility of health care services for children and other dependent persons. However, most projects included in the evaluation have neutral impact on gender equality, namely, projects offer formal statement of gender non-discrimination which does not promote gender equality but also does not worsen the situation. Projects containing formal statement of gender non-discrimination can have positive impact on gender equality, if the promoters of the projects carry out concrete actions to fulfil the assertion thus considerably promoting gender equality.

Analysis of the ESF contribution and impact on HP EO equal rights for persons with disabilities brings about a conclusion that SOP activities have vertical impact on the respect for rights of persons with disabilities in 22% ESF social inclusion projects and 6% educational projects where specific activities with the purpose of resolving target group's problems are provided. Horizontal impact on the respect for rights of persons with disabilities is envisaged in 9% educational projects, 9% employment projects and 41% social inclusion projects. These projects are not directly aimed at persons with disabilities but along with other activities projects envisage involvement of persons with disabilities and specific activities with the purpose of protecting rights of this group. It should be mentioned that the number of projects which deal with problems in education and employment is insufficient; however, specific activities in projects aimed at equal opportunities for persons with disabilities in general correspond to the needs of the target group.

Of all the sampled projects 5.9% (65) projects have a horizontal impact on the active aging principle, but 0.4% or 5 projects - a vertical impact. The largest number of projects which have a horizontal effect on the HP EO active aging principle is implemented in the education and employment sector. Principle has been mainly implemented in the field of education 22 (8%), while in the employment field - 19 (15%) projects. Additionally the principle has been implemented in 9 (5%) administrative capacity building projects, while seven projects or 26% - in entrepreneurship and innovation sector. 4 projects were carried out in the field of social inclusion, while a single project in the urban area. Vertical impact on HP EO active aging principle was indicated in social inclusion field (3 projects), one in science field and one in the employment area. Analyzing projects, it is evident that the aspect of active aging is the one which has not been respected for the most. Among the reasons project implementers indicate existing contradictory understanding of the term "active aging" and the target groups of it. In the future it would be important to define more specifically term "active aging", define the borders, promote the understanding and respect of the principle in practice.

In the next planning period competent authorities should make sure that HP EO objectives are fulfilled in all activities financed by the ES Structural Funds and supervised with the help of monitoring indicators. It refers to all activities where impact on specific horizontal objective is direct or indirect and it is necessary to obtain necessary information on the impact of HP EO implementation on the Community's long-term objectives.

It is advisable to perform analysis of interaction between vertical and horizontal activities and define concrete prior or advisable actions with the help of both specific activities and other activities of the programme in the policy of HP EO whose implementation in general ensures purposeful achievement of HP EO objectives.

Thus in the next planning period it is necessary to define specific objectives and specific monitoring indicators that promotes HP policy in all activities of the programme.

We advise managing authority in cooperation with competent sectoral ministries in the next planning period to define and explain requirements and/or advisable actions to the EU Structural Funds management institutions in order to promote achievement of HP objectives in the work of these institutions.

The evaluation report consists of an introduction, description of the situation and methodology, the evaluation results and findings, conclusions and recommendations.

The evaluation employs the following methods:

- Content analysis, including quantitative analysis of statistical information
- Qualitative analysis of project applications
- Case studies, including document analysis, interviews with project promoters and surveys at project places.

The evaluation has been made by “Projects and Quality Management” and the NGO “ACCIPE!”, which involved the evaluation manager, the senior researcher with three assistants, key expert, expert on disability and active ageing matters as well as expert on gender issues.

The evaluation was carried out over a period of four months – from May 26 to September 26, 2011.