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Objective and scope of the study

The „Evaluation study on the application of the principle of equality of opportunity between women and men and of the principle of equality of opportunity and non-discrimination, including accessibility for persons with disabilities, within Cohesion Policy 2014-2020 and on the assessment of implementation of the Governmental Programme - Accessibility Plus 2018-2025” has been divided into two research modules. This report presents results of the evaluation for Module I, which concerns the assessment of management and implementation systems as well as the effects of implementing the horizontal equality principles. Module I has involved researching into all Cohesion Policy programmes (national, regional and ETC/ENP ones) managed by Poland over 2014-2020.

The principle of equality of opportunity between women and men

During the 2014-2020 programming period the central administration did much more with regard to the correct implementation of the principle of equality of opportunity between women and men than they were supposed to do according to the provisions of official EU documents. Additional initiatives were taken, which led to among other things, the development of: *Guidelines with regard to implementing the principle of equality of opportunity.....: Agenda of initiatives in favour of equality of opportunity...: Guidebook. How to implement the principle of equality of opportunity.....* The usefulness of the documents has been assessed very positively by all groups of respondents. Furthermore, there was functioning a *Working Group for Equality of Opportunity...* within which Female Coordinators/ Male Coordinators for Equality of Opportunity between Women and Men, appointed under particular programmes, took part in meetings organised twice a year. Within ESF -funded programmes, the so-called *dual approach* was being put in practice by dedicating one of investment priorities – 8iv. to “Equality between women and men in all fields...”

However, the potential of all the initiatives was not fully used and it translated into specific activities in projects to a lesser extent than it was possible. Consequently, it did not contribute significantly to the improved situation of the participants or recipients of EU-funded activities. It resulted from a several factors.

Most available diagnoses prepared at the programming stage focused on identifying inequalities in the area of labour market, frequently neglecting the potential of other planned activities which might have had an impact on levelling opportunities between women and men in other aspects of life. Therefore, the initiatives taken focused mainly on creating and developing childcare facilities intended for children under 3 years of age. Consequently, manifestations of other equality barriers identified in the *Guidelines....* were addressed to a lesser extent. As for EFS-funded programmes, the minimum standard was adopted while assessing applications for funding. However, in the case of a considerable number of the approved applications, the provisions used were of declarative and general

Module I – summary of the report

nature and did not point out specific and measurable activities aimed at implementing the principle. It hindered monitoring and controlling those activities at later stages. Similar problems concerned ERDF- and SF-funded projects. The impact of the implementation of those ventures was additionally limited by a high share (over ½) of projects regarded as neutral as for the principle implementation. The indicated limitations were also influenced by gaps in knowledge and skills in the persons engaged in programming and implementing interventions as well as in beneficiaries themselves. They were not always able to translate the idea of implementing the principle into specific and measurable activities, possible for undertaking. Therefore, a lot of efforts made by representatives of ESF Management Department in the Ministry of Development Funds and Regional Policy (MDFRP) and targeted at the principle implementation translated into actions taken in practice within particular programmes only to a limited extent. For example, Female Coordinators/Male Coordinators for Equality of Opportunity between Women and Men often were not empowered enough by the Managing Authority (MA) so that their initiatives would have a real impact on the whole programme.

Despite the difficulties mentioned above, positive effects of the principle implementation have been observed. In particular, they refer to the implementation of ESF- funded programmes in respect of levelling barriers in access to employment. Thanks to initiatives undertaken, access to childcare with regard to children under 3 years of age has considerably improved. At the stage of project implementation, the principle implementation itself was regarded by applicants as not really burdensome. Both beneficiaries and female representatives/male representatives of the institutions claim that the principle implementation is important as for Cohesion Policy projects. Only at the level of the institutions involved in the implementation, equality solutions have been used more and more frequently. Particularly, they concern a greater flexibility when it comes to time and place of work, which makes it possible to combine a career and private life, including taking care of children and dependent persons.

A priority horizontal principle over 2014-2020 became the principle of equality of opportunity and non-discrimination, which puts mainly emphasis on the question of accessibility for persons with disabilities. As a result, initiatives in favour of implementing the principle of equality of opportunity between women and men were taken to a limited extent within particular programmes, which translated into a limited extent of implementing that principle.

The results of the evaluation study show that in the subsequent period it is necessary to strengthen efforts in favour of a more effective and actual implementation of the principle of equality of opportunity between women and men. This report includes a number of recommendations which could be introduced with this aim of achieving the above mentioned. Some selected recommendations are presented below:

- to maintain the up-to-now engagement of representatives of the ESF Management Department within the MDFRP with regard to the implementation of the principle of

equality of women and men (going beyond minimum provisions of EU regulations) and to more heavily engage other MA representatives (especially those implementing EERDF/SF programmes).

- to implement -within the so-call *dual approach* – activities referring to all manifestations of equality barriers identified in the *Guidelines*.
- It is also necessary to do the following on a larger scale:
 - to organise competitions dedicated to the equality of women and men;
 - to implement projects dedicated to the principle within non-competitive path;
 - to use criteria rewarding out-of-the box solutions in favour of equality of opportunity between women and men.
- Applications with regard to the principle should be only assessed on the basis of precise provisions confirming the implementation of equality assumptions (the provisions should not include only declarations made by applicants).
- In the subsequent programming period it is necessary to take initiatives of training and counselling nature with regard to the principle which are targeted at both representatives of the institutions and beneficiaries.

The principle of equality of opportunity and non-discrimination, including accessibility for persons with disabilities

Like in the case of the former of the principles discussed, over 2014-2020 the central administration in Poland did much more with regard to the correct implementation of the principle of equality of opportunity and non-discrimination, including accessibility for persons with disabilities, than they were supposed to do according to official EU documents. *Guidelines....., Agenda.....* concerned, in fact, the two horizontal principles analysed in this evaluation study. There was functioning a *Working Group for Equality of Opportunity.....* It is absolutely necessary to highlight a lot of efforts made by the MDFRP by starting up in 2018 the Accessibility Plus Programme.

The analysis of competition documentation and the interviews conducted show a positive change in the approach to the application of the principle of equality of opportunity and non-discrimination at the stage of project assessment and selection, particularly with regard to supporting persons with disabilities, thanks to among other things, defining accessibility standards. Nonetheless, the evaluation study reveals that formal zero-one criteria translated to a moderate extent into additional solutions aimed at the increased accessibility. A bigger impact on the scope and quality of the introduced solutions has been exerted by rewarding criteria, used mainly in ESF programmes. Like in the case of the former rule, quite a frequent problem (although a smaller one in this case) was declarative provisions in the applications, which hindered monitoring and controlling the implementation of the principle of equality of opportunity and non-discrimination at further implementation stages.

Coordination of initiatives related to programming and implementing the principle of equality and non-discrimination, including accessibility for persons with disabilities within Cohesion Policy has been assessed very positively. Particularly, practical trainings and counselling activities -which were run horizontally- have been assessed as highly useful. However, when it comes to the activity of Female Coordinators/Male Coordinators for Equality of Opportunities and Non-Discrimination, it has been assessed a little less positively. The study shows that administrative burdens related to implementing the principle were not significant and were adjusted to the level of the effects planned to be achieved in this respect.

The level of awareness with regard to the needs of persons with disabilities has clearly increased. It was definitely influenced by initiatives taken by the ESF Department within the MDFRP, such as publishing the guidebook, defining accessibility standards, putting in force an act on providing accessibility for persons with particular needs as well as the Accessibility Plus Programme. On the one hand, the awareness of employees of the institutions and beneficiaries in respect of the needs of persons with disabilities increased, but on the other hand, they were provided with specific tips as for how to respond to those needs. Despite taking some initiatives this question was treated as a second-rate in some institutions, which has been reflected by allocating insufficient resources, a lack of applying additional criteria to project selection, insufficient training activities, etc. One of the instruments improving the accessibility of projects for people with special needs was to be a mechanism of rational facilities. However, it turns out that it has been used relatively rarely. The main barrier in this respect is a gap of knowledge in beneficiaries and also ambiguities regarding how to use the instrument as well as a sceptical attitude of some MA and IB (Intermediate Body) representatives.

Undoubtedly, a significant change in the project promoters' awareness has been made due to the Accessibility Plus Programme. Sticking to *dual approach*, a definitely greater emphasis was put on the implementation of projects aimed at limiting inequality and discrimination as for access to different sorts of services, infrastructure and products. Consequently, the question of accessibility has appeared in the areas in which it has not been so far sufficiently recognised and analysed., e.g. health, higher education, etc.

From the point of view of project participants and users, the most important effects of application of the principle mean better access to infrastructure, improved access to the cultural and sporting offer, newly created applications customised to the needs of people with disabilities. Thanks to better access to trainings, the support granted has also translated into an increase in competence, acquisition of qualifications, a change in attitudes, including an increase in self-confidence.

The results of the study show that when it comes to the Cohesion Policy projects implemented in Poland, cases of discrimination due to the grounds defined in the

Regulation **have occurred very rarely** (only **0.1% to 2.2%** of participants have experienced or witnessed – within the project- unequal treatment due to various grounds)¹.

This report includes recommendations, the implementation of which might support putting the principle of equality of opportunity and non-discrimination, including accessibility for persons with disabilities, in practice. Some selected recommendations are as follows:

- to increase the number of dedicated activities in the form of separate measures/sub-measures or competitions (e.g. like competitions dedicated to the Accessibility Plus Programme). They should be also aimed at supporting other groups discriminated due to the other grounds mentioned in the General Regulation (it should be preceded by appropriate studies diagnosing the needs in this respect
- to increase the scope of applying scoring criteria rewarding solutions which foster levelling opportunities for groups under threat of discrimination
- to continue and to intensify activities of training and counselling nature with regard to implementing the principle at the horizontal level and at the level of operational programmes
- to continue the Accessibility Plus Programme within a new financial perspective. It is essential to support ventures which increase the accessibility of services and infrastructure for people with special needs

¹ Source: CAWI survey with project participants, n=728.