

# 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

## Information brochure

### Module I



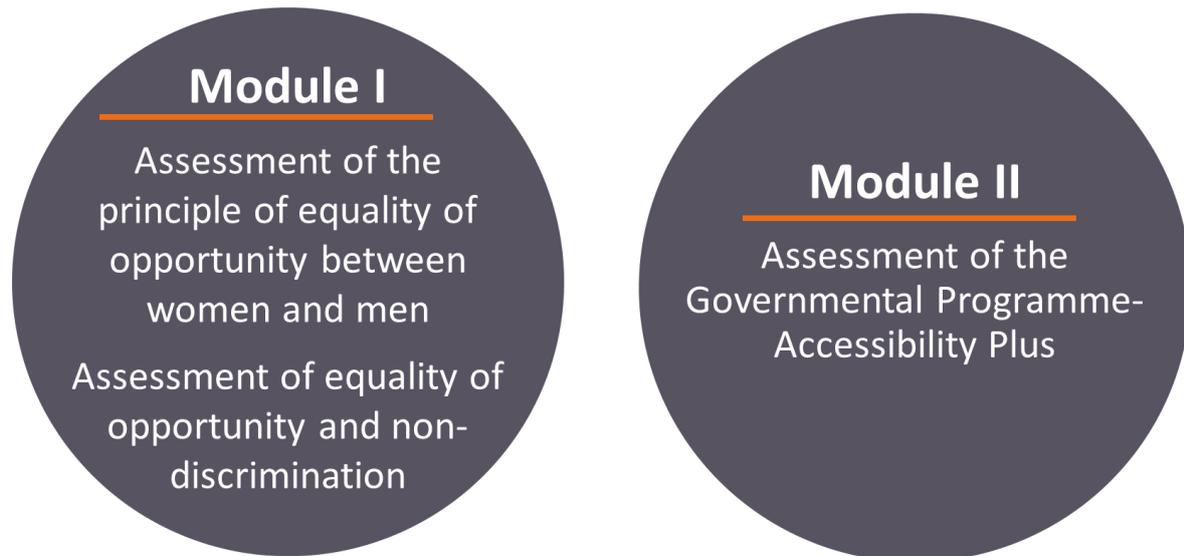
European  
Funds

European Union  
European Structural  
and Investment Funds



## 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 consisted of two research modules.

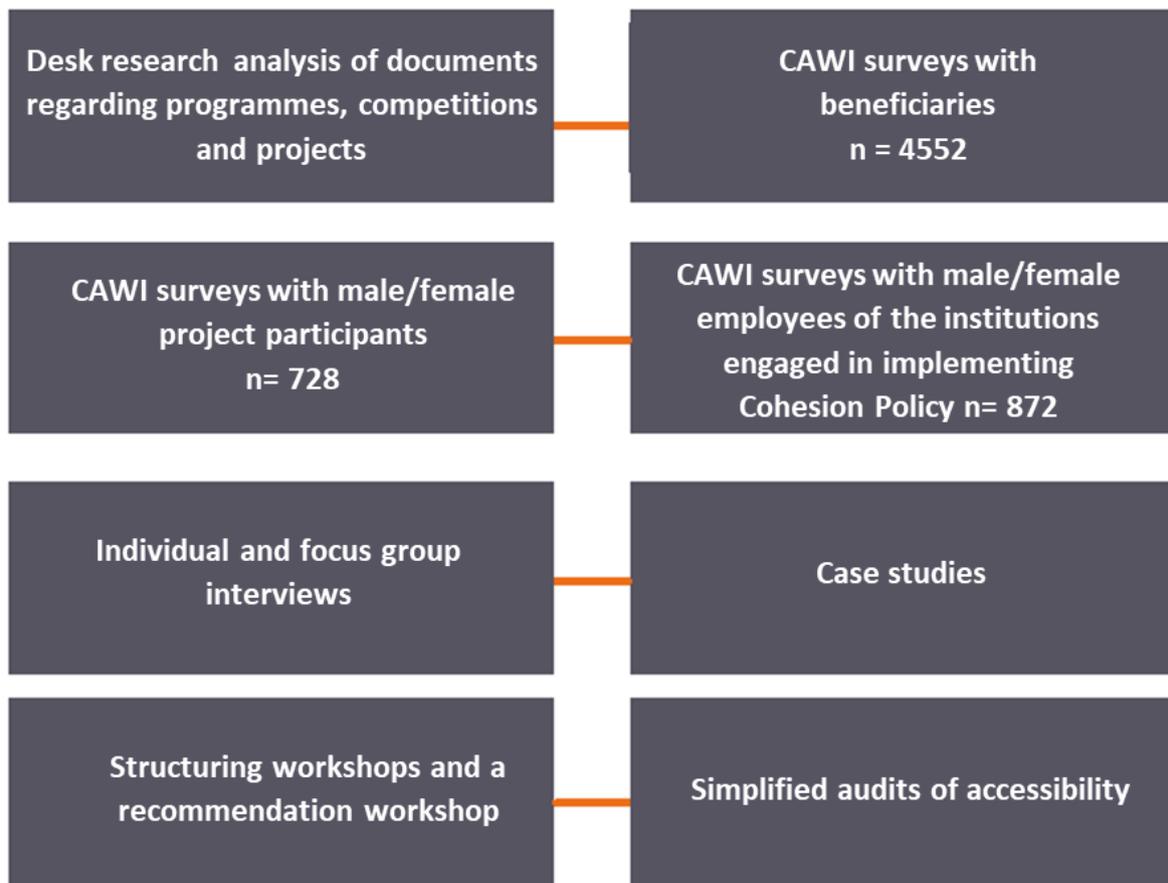


Within Module I the evaluation study has covered all Cohesion Policy programmes (national, regional and European Territorial Cooperation /European Neighbourhood Instrument ones) managed by Poland over 2014-2020.

## Methodology

In the study, the concept of **theory-based evaluation** has been applied and then its specific form, namely **contribution analysis**, has been used. Its main objective was to verify whether the cause-and-effect relationships assumed in theory and the effects of initiatives undertaken have occurred.

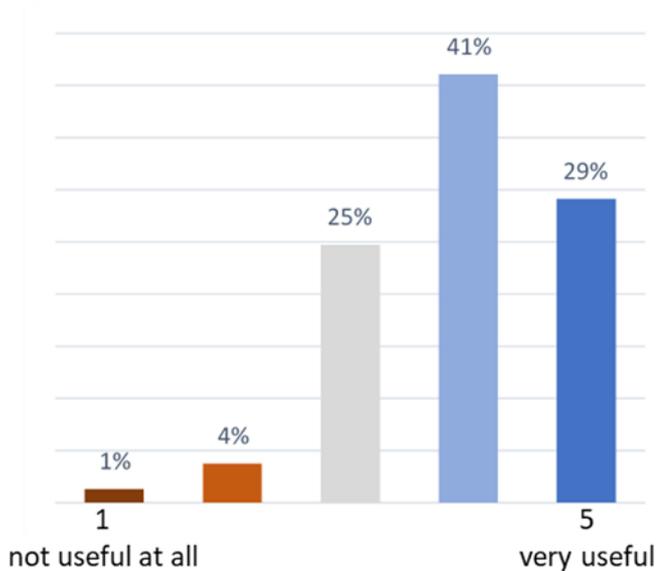
In the study, within the evaluation of Module I, the following research methods/techniques have been applied:



## The principle of equality of opportunity between women and men

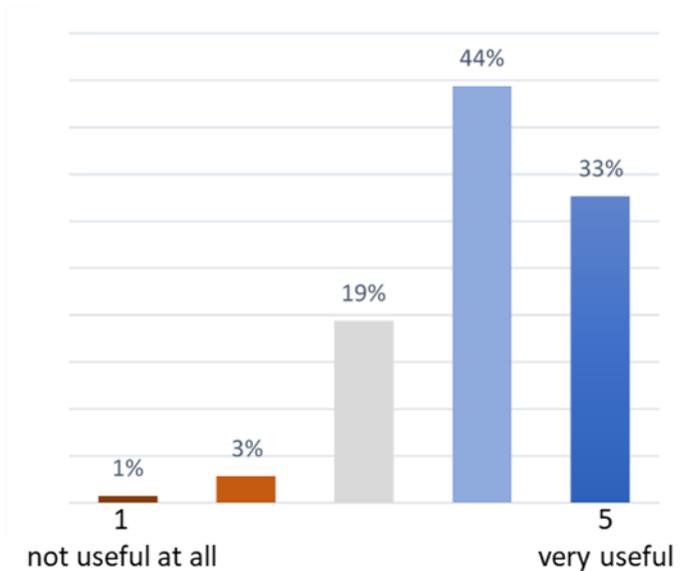
- ➔ During the 2014-2020 programming period the central administration **did much more with regard to the correct implementation of the principle** of equality of opportunity between women and men than they were supposed to do according to the provisions of official EU documents.
- ➔ Within additional activities some documents were developed among others, e.g.:
  - 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 utility of the documents has been assessed very high by all groups of respondents.**

To what extent were the Guidelines useful for working out a mode of taking account of the principle of equality of opportunity between women and men within your project?



Source: CAWI with beneficiaries, n=2889

To what extent was the Guidebook useful for working out a mode of taking account of the principle of equality of opportunity between women and men within your project?



Source: CAWI with beneficiaries, n=1770

- Another example of activity was 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. The participation in the meetings has been regarded as invaluable due to among others, **an opportunity of exchanging information and consulting problematic issues.**
- Within European Social Fund (ESF) -funded programmes, the so-called *dual approach* was being put in practice by dedicating one of investment priorities to equality between women and men. However, its implementation was mainly focused on creating and developing childcare facilities intended for children under 3 years of age.

**The potential of the initiatives being taken was not fully used and it translated into specific activities in projects to a lesser extent than it was possible. It also did not fully translate into the improved situation of the participants or recipients of EU-funded activities. It resulted from a several factors:**

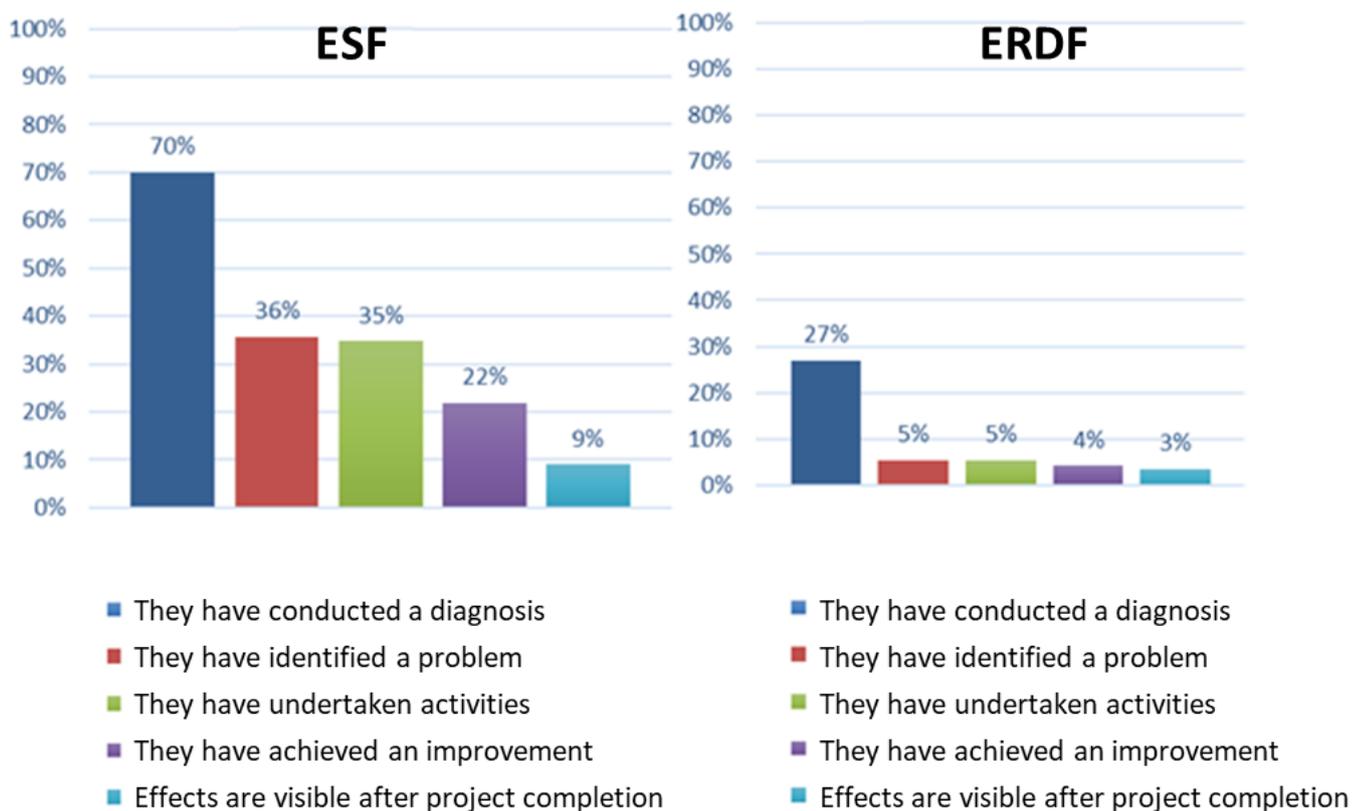
- Most available diagnoses worked out for the needs of preparing programmes focused on identifying inequalities in the area of labour market, neglecting other issues which might have had an impact on levelling opportunities between women and men in other aspects of life.
- As for EFS-funded programmes, the minimum standard was adopted while assessing applications for funding. However, in the case of a considerable number of the applications approved, the provisions used were of declarative and general nature and did not point out specific and measurable activities aimed at implementing the principle. It hindered monitoring and controlling those activities at later implementation stages.
- 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 (it concerns European Regional Development Fund and Cohesion Fund).
- Some gaps in knowledge and skills in the persons engaged in programming and implementing interventions as well as in beneficiaries themselves have been identified. They were not always able to translate the idea of implementing the principle into specific and measurable activities, possible for undertaking under particular programmes, priorities or types of projects.
- 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.

**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.

## Effects of the principle implementation

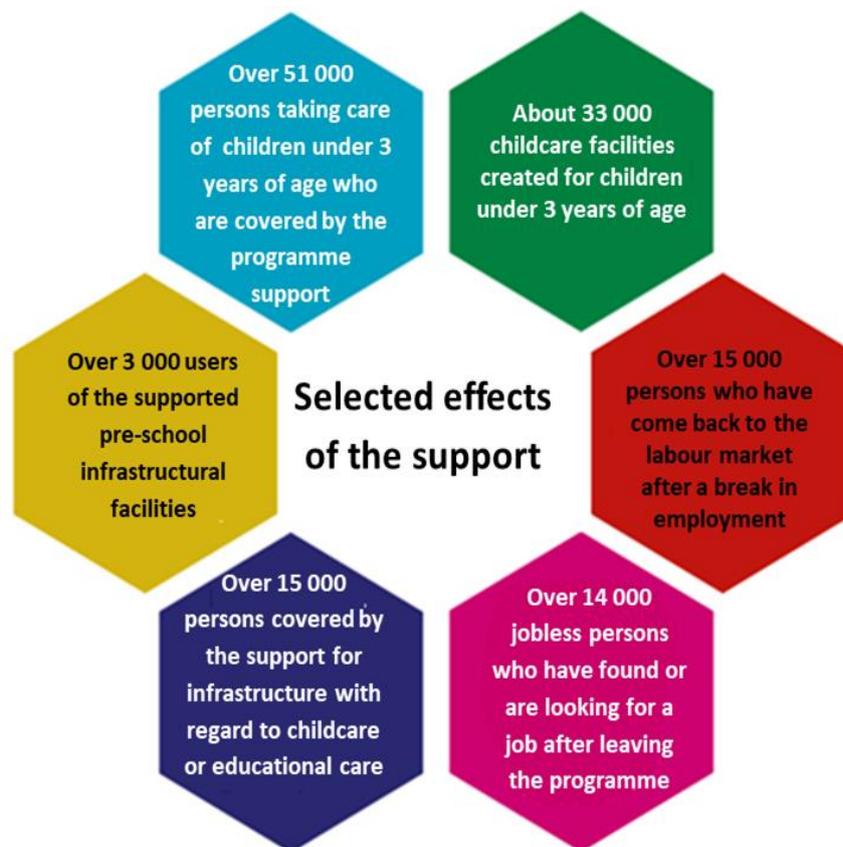
- As a result, the effects of implementation of the principle of equality of opportunity between women and men (in its horizontal dimension) have contributed to a limited extent to the improved situation of target groups.
- In the case of ESF, 70% of beneficiaries have been conducting a diagnosis and 22% of them have been achieving effects of the activities undertaken as a result of the diagnosis conducted.
- In the case of ERDF, **only 27% of beneficiaries have been conducting a diagnosis** and 4% of them have been achieving effects of the activities undertaken as a result of the diagnosis conducted.

Percentage of beneficiaries undertaking activities related to implementing the principle of equality of opportunity between women and men



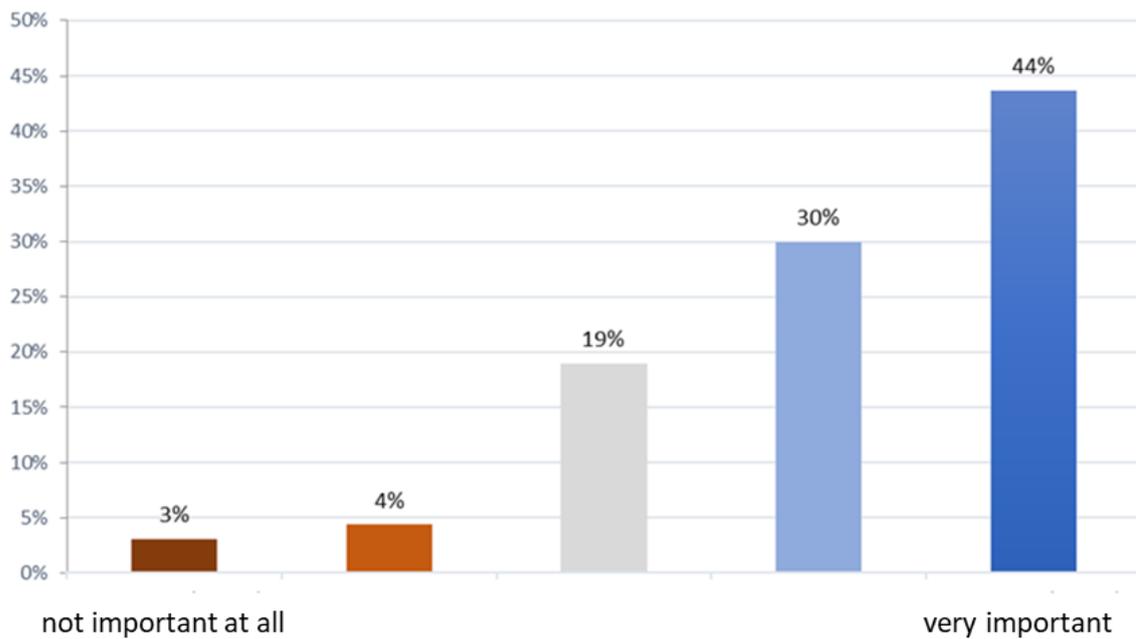
Source: CAWI with beneficiaries, n=1592 (left), n=262 (right)

- ➡ Positive effects have been observed as for initiatives aimed directly at the implementation of the principle of equality of opportunity between women and men. They were implemented in all ESF-funded programmes. In particular, it is worth highlighting significant effects of implementing ESF-funded programmes in respect of levelling barriers in one of the identified areas which is access to employment. Thanks to the initiatives undertaken, access to childcare with regard to children under 3 years of age has considerably improved.



**Changes in awareness** ➔ both beneficiaries and female/male representatives of the institutions are convinced that the implementation of the principle of equality of opportunity between women and men is significant in Cohesion Policy projects.

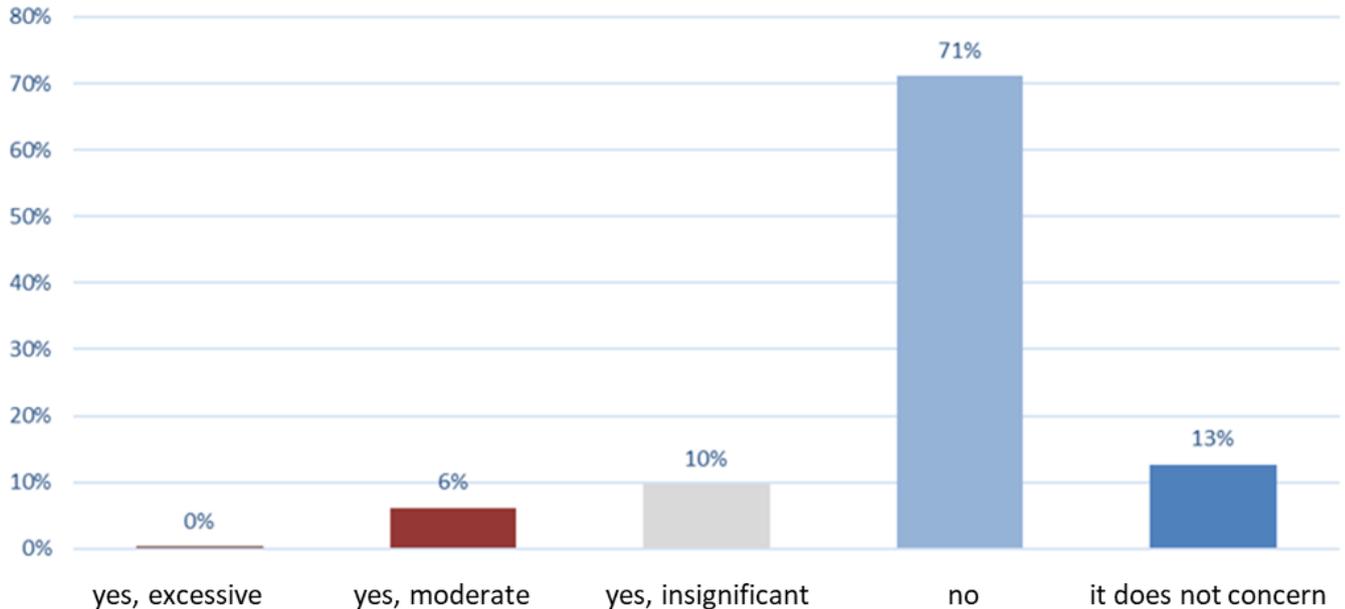
To what extent is it personally important to you to apply the principle of equality of opportunity between women and men to Cohesion Policy?



Source: CAWI with employees of institutions, n=872

- ➔ **Practical manifestations of changes undergoing in awareness** ➔ at the level of the institutions involved in implementation, equality solutions have been used more and more frequently. In particular they concern a greater flexibility when it comes to time and a place of work, which makes it possible to combine a career and private life, including taking care of children and dependent persons.
- ➔ At the level of project implementation, implementing the principle itself has been **regarded** by applicants **as not really burdensome**.

Looking back at your experiences while applying for funding and implementing the project, would you please indicate whether the implementation of the principle of equality of opportunity between women and men was for you /and the institution an administrative burden?



Source: CAWI with beneficiaries, n=2890

## Selected recommendations

- ➔ **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 (coordination aspect) and to more heavily engage other MA representatives (implementation aspect).
- ➔ 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 should be only assessed on the basis of **precise provisions confirming the implementation** of equality assumptions, not declarations made by applicants.
- ➔ 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 principle of equality of opportunity between women and men, during the programming period 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.
- ➔ The adopted solutions provided frameworks for implementing the principle of equality of opportunity and non-discrimination, including accessibility for persons with disabilities.
- ➔ At each stage of implementing programmes ( including also ERDF- and SF- funded programmes) the implementation of the principle of equality of opportunity and non-discrimination, including accessibility for persons with disabilities, was taken into consideration.
- ➔ Operational programmes took account – to a broader extent- of *dual approach* as compared to the former principle, mainly by implementing interventions aimed at increased accessibility for persons with disabilities ( among others, under the Accessibility Plus Programme).

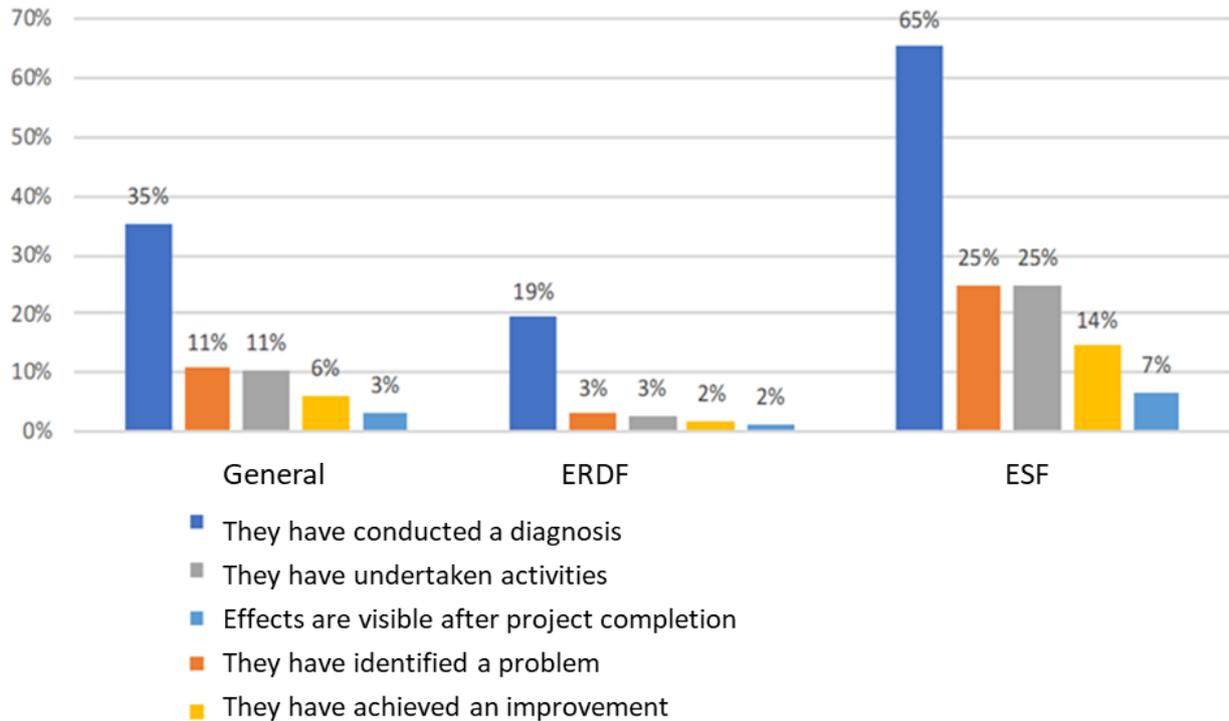
**Like in the case of the former horizontal principle under analysis, this potential has not been fully used. It resulted from several factors:**

- Diagnoses within programmes focus mainly on discrimination grounds due to the age and disability.
- Instruments dedicated to the question of discrimination and accessibility have been taken into account in the programming process, mainly under the Operational Programme Knowledge Education Development (OP KED). A significant change was noticed in this respect after the start-up of the Accessibility Plus Programme.
- formal zero-one criteria have translated to a moderate extent into additional solutions aimed at the increased accessibility for persons with disabilities.
- A bigger impact on the scope and quality of the introduced solutions has been exerted by rewarding criteria, used mainly in ESF programmes.
- A problem was declarative provisions in the applications - it hindered monitoring and controlling the implementation of the principle at further implementation stages.

## Effects of the principle implementation

- ➔ As a result, the effects of implementation of the principle of equality have contributed to a limited extent to the improved situation of target groups.
- ➔ In the case of ESF, 65% of beneficiaries have been conducting a diagnosis and 14% of them have been achieving effects of the activities undertaken as a result of the diagnosis conducted.
- ➔ In the case of ERDF, only 19% of beneficiaries have been conducting a diagnosis and 2% of them have been achieving effects of the activities undertaken as a result of the diagnosis conducted.

Percentage of beneficiaries undertaking activities related to implementing the principle of equality of opportunity and non-discrimination

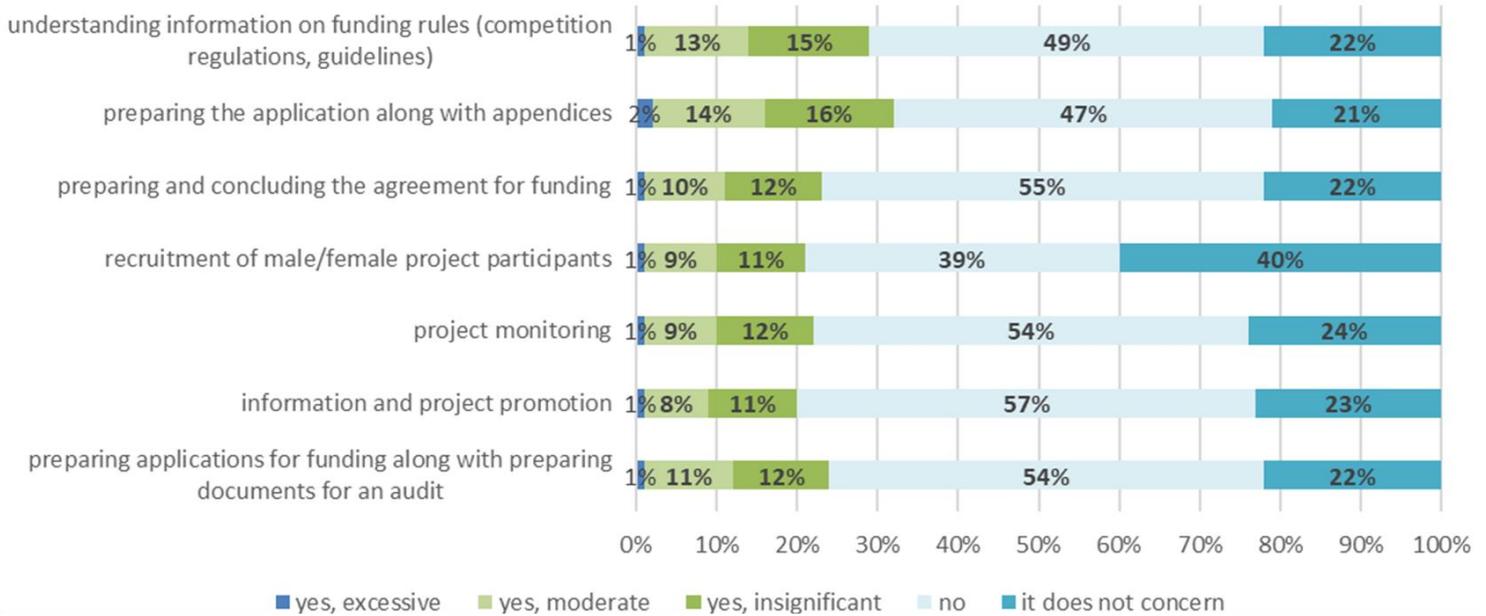


Source: CAWI survey with beneficiaries, n=4552 (the sample did not include beneficiaries of the Accessibility Plus Programme who were provided with the questionnaire for Module II within the study)

- ➡ 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<sup>1</sup>).
- ➡ In the opinion of both beneficiaries and institutions engaged in the Cohesion Policy implementation, the principle implementation **is not a significant administrative burden.**

<sup>1</sup> Source: CAWI survey with project participants, n=728

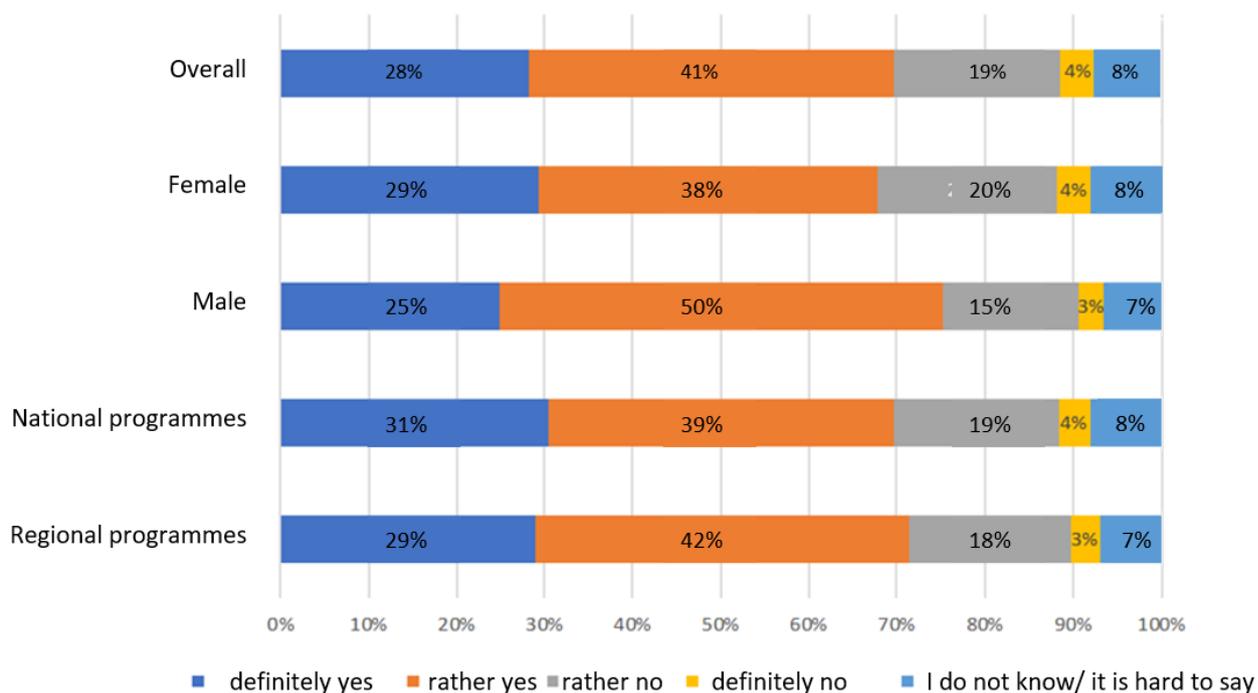
**Looking back at your experiences while applying for funding and implementing the project, would you please indicate whether the implementation of the principle of equality of opportunity and non-discrimination was for you /and the institution an administrative burden at the stages shown below?**



Source: CAWI with beneficiaries, n=4552

- ➔ **The level of awareness with regard to the needs of persons with disabilities has clearly increased.**
- ➔ **The increased awareness has been influenced by initiatives taken by the ESF Department within the MDFRP: publishing the guidebook, defining accessibility standards, training initiatives, putting in force an act on providing accessibility for persons with particular needs as well as the Accessibility Plus Programme.**

Has the awareness concerning the needs of persons with disabilities increased, as a result of the activity of institutions included in the system of implementing Cohesion Policy?



Source: CAWI with employees of institutions, n=872

- ➔ **A change in the paradigm of project promoters' approach has been made by 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.
- ➔ The support granted within the programme has been clearly translated into **measurable benefits for project participants and users:**
  - better access to infrastructure;
  - improved access to cultural and sporting offers;
  - created applications customised to the needs of people with disabilities;

- ➔ better access to trainings and other forms of support, acquisition of competence and qualifications, a change in attitudes, including an increase in self-confidence.

## Selected recommendations

- ➔ It is necessary **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). Such initiatives/competitions 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).
- It is advisable to consider **increasing the scope of applying scoring criteria** rewarding solutions which foster levelling opportunities for groups under threat of discrimination
- It is **recommended to continue and to intensify activities of training and counselling nature** with regard to implementing the principle.
- The **Accessibility Plus Programme should be continued** within a new financial perspective. It is essential to support ventures which increase the accessibility of services and infrastructure for people with special needs.

