

# The mid-term evaluation of the impact of the EU funds on the achievement of the horizontal principle “Equal opportunities” promoting gender equality, the rights of persons with disabilities and inclusion, anti-discrimination in the 2014-2020 programming period

## SUMMARY

### The aim and the scope of the study

The aim of the study is to evaluate the impact of the EU funds in the 2014-2020 programming period on the achievement of the horizontal principle “Equal opportunities” (hereinafter – HP EO) objectives. The period covered by the study is from 2014 to the first half of 2018. An in-depth evaluation of **169 European Social Fund projects** has been carried out. In addition the indicators characterizing the impact on horizontal policy objectives were analysed in the frame of 188 projects of the European Regional Development Fund and seven Cohesion Fund projects. The data on participants in ESF projects refer to December 2017. As concerns the analysis of the HP EO indicators, the most recent available values are analysed. Besides, a qualitative analysis of examples of good practice has been conducted as well as an analysis of the implementation and coordination process of the HP EO.

The main study tasks are the following:

- to analyse the profile of target group participants in ESF co-financed projects;
- to evaluate data on the HP EO indicators within the framework of specific goals of support and measures;
- to assess the extent to which specific activities promoting the HP EO are implemented in projects;
- to assess the experience of two EU Member States (Estonia and Slovenia) in implementing the HP EO;
- to identify and describe examples of good practice (projects);
- to analyse the HP EO coordination and implementation mechanism and identify problems in this area;
- to develop the recommendations to mitigate the identified problematic issues in all four aspects of HP EO.

Three basic methods have been used to complete the tasks defined therein: document analysis (including analysis of legal and policy planning documents, analysis of secondary data, analysis of projects documents); statistical data analysis (statistical data, including up to the level of projects implementers, all quantified data and aggregates thereof); expert interviews (a total of 30 interviews with 46 experts).

The involved staff in the management of EU funds and project implementation generally appreciates the methodological, consultative and educational support provided by the Ministry of Welfare in this field.

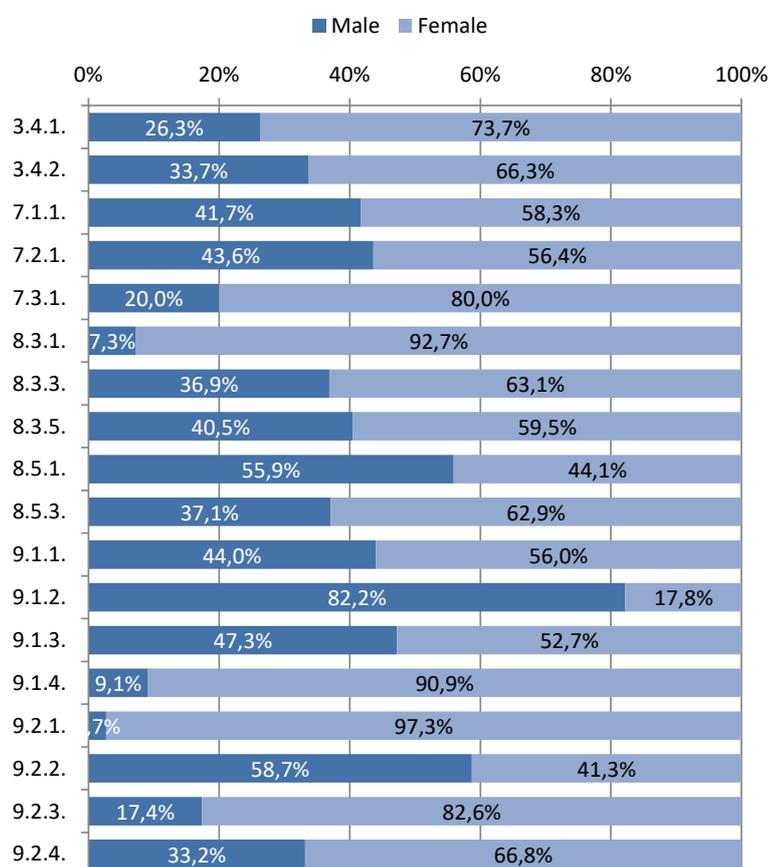
### The approaches of the implementation of the HP EO

As a result of the integrated analysis, four approaches of the implementation of the HP EO resulting from project practices have been identified.

- 1 The approach whereby there is no awareness of the need to place a particular emphasis on the HP EO in the scope of projects, aspects of this principle have been integrated into the field in question as core values and expertise of the professionals involved. This approach maintains a strong general non-discrimination discourse.
- 2 The approach which implies that the activities targeted at the HP EO are not the core of the project, therefore they are given secondary importance. The HP EO indicators, if any, will be assessed at the end of the project.
- 3 The approach according to which the focus on the absence of any restrictions based on one's age, gender, ethnicity or disability in the project is seen as respecting the HP EO. At the same time, projects do not carry out any specific actions to promote, strengthen and foster the equal opportunities.
- 4 The proactive approach which implies that the HP's EO aspects are significant both at project management and project activities level. It is important to point out that the proactive approach can be applied to a project as a whole (more typically to projects with specific target groups), as well as to the specific activities or target groups. In general, such proactive approach contributes to the overall tolerance of society, equal treatment of all regardless of one's age, gender, ethnicity or type of disability.

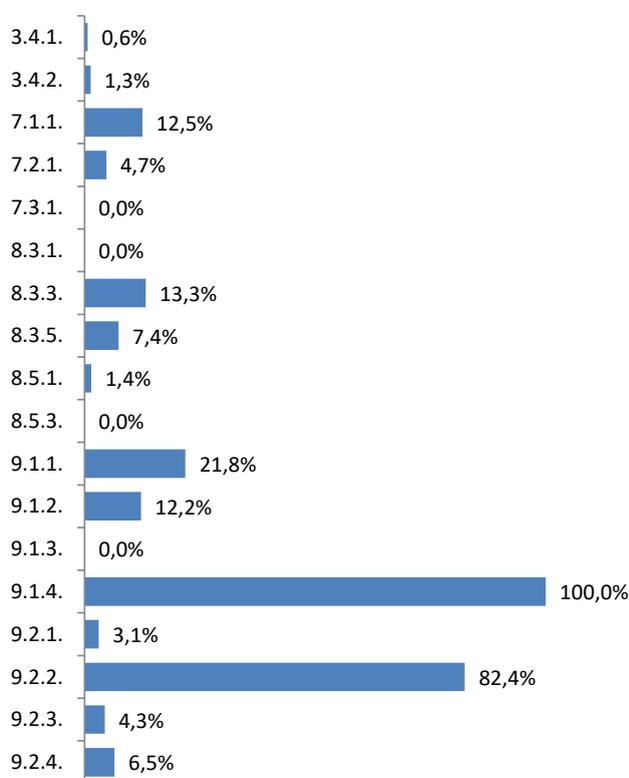
## The profile of the ESF projects' participants

In total, **105 296 PARTICIPANTS** have participated in 169 ESF projects in Latvia by 31 December 2017. 24.8% of them are declared in Latgale region, 15.1% in Riga region, 12.1% in Pieriga region, 11.7% in Vidzeme region, 14.2% in Kurzeme region, 13.8% in Zemgale region. 8.3% of participants do not have indicated a place of residence.



Data analysis by **GENDER** shows that 40.7% of ESF projects' participants are male and 59.3% female. The proportions of men and women among participants in different specific goals of support vary, as determined by the objectives and target groups of the respective activities of the specific goals of support (for example, the activities are targeting to the target group where dominance of one gender are observed). In general, it is important that gender balance is achieved in the implementation of the specific goals of support with activities targeted at large groups of the population and can be considered to have been achieved in the implementation of the specific goals of support 7.1.1, 7.2.1., 8.5.1., 9.1.1., i.e. employment projects and participation of VET students in work-based learning.

The target group members' profile by the **AGE GROUP** is also influenced by the projects implemented within the scope of the specific goals of support. The ESF projects implemented in the field of employment and education (the specific goals of support 7.1.1, 7.2.1 and 9.1.1) provide a large number of participants in the age range of 15 to 59 years, representing 82.7% of the total number of participants. Children and young people aged 0 to 29 are 44%. The least number of participants is reached in the age group 65+ – 1.8% of the total number of participants, which is achieved mainly through the projects of the specific goal of support 9.2.4 (health promotion).



12.3% of the participants in ESF projects were **PERSONS WITH DISABILITIES**. 1.4% of the participants were visually impaired, 0.4% were hearing impaired, 2.7% – with movement disorders, 4.3% – mental disabilities and 6.4% – other disabilities. The most commonly disabled persons are participants of activities implemented within the specific goals of support 9.1.4., 9.2.2., 9.1.1., 8.3.3., 7.1.1., 9.1.2. aimed at promoting integration into the labour market or supporting activities. The breakdown of ESF project participants with disabilities by gender is proportionate.

## The main conclusions

The following main conclusions have been drawn from the impact evaluation of the actions undertaken so far with regard to the HP EO aspects.

**People with disabilities** are a target group that has been given particular attention and for which both the implementation of long-term actions and immediate support actions have been launched, contributing to the inclusion in education, the labour market and society in general.

In the area of **gender equality**, there is a growing awareness of the importance of equal opportunities in all areas of life, regardless of gender. In addition, it should be emphasized that the gender dimension is taken into account not only to ensure the availability of different resources, but also to pay more attention to the integration of this aspect into the content of various activities.

During this programming period, particular attention has been paid to a number of **older population groups**, especially those aged 54+, with a view to promoting its active aging by providing diverse support in the social, professional, educational and health fields.

With regard to actions that reduce discrimination on the **grounds of ethnicity**, it can be concluded that the beneficiaries implement actions that prohibit discrimination on the basis of these features within the framework of project activities.

In the process of elaboration of the HP EO criteria and their application methodologies, significant problems were not identified by any of the parties involved. Inter-institutional cooperation is assessed as effective.

## The main problems in the implementation process of the HP EO

- ☹️ Although the understanding of equal opportunities and non-discrimination amongst those involved in the management of EU funds and projects' implementation has increased, there is still a narrow understanding of the HP EO only as compliance with some general technical principles.
- ☹️ Project implementers lack an in-depth understanding of the diversity and horizontal expression of HP EO in the context of the specific activities across different sectors.
- ☹️ The overall activities of the HP EO (such as access to information and the environment, non-discrimination on the grounds of age, gender, ethnicity, compliance with the HP EO in project management) have not resulted in the specific monitoring tools or indicators that do not allow to perform a comprehensive assessment of their implementation.
- ☹️ There is an insufficient collection of the examples of the HP EO implementation activities in different sectors that would contribute to the development and dissemination of the innovative activities in this field.

## The main principles of the good practice

- 😊 The continuous analysis of target groups' needs and responsiveness to the new needs.
- 😊 The specific activities promoting the HP EO implementation are consistent with the project's objective and activities, they are based on specific tools and specific needs-based activities.
- 😊 The project implementers have experience, understanding and knowledge of the nature and versatility of the HP EO, its aspects, objectives and the role of implementation in improving the situation and quality of life of specific beneficiaries.
- 😊 The project implementers use diverse means of communication, channels and forms to reach their target groups and to motivate them to engage in project activities.
- 😊 The project implementers apply individual approach to the HP's EO target groups.
- 😊 The general principle of non-discrimination is integrated in project management, organization and implementation of all activities.

## Recommendations for the implementation, coordination and evaluation of the HP EO activities

- To continue to provide educational and informative support on the essence and manifestations of the HP EO with a particular focus on mainstreaming equal opportunities in all types of activities.
- To provide an explanation of the relevant indicators when defining the HP's EO indicators in the specific fields specifying the types of activities and the characteristics of the target group.

- To differentiate the activities of the HP EO according to their specificity, define the universal or general activities of the HP EO that can be implemented independently of the field and develop the appropriate assessment tool.
- To match activities to reach indicators as much as possible with those that contribute to the achievement of the HP's EO indicators, especially for the projects where the indicator's unit is individuals (project participants).
- To define the minimum requirements for the criteria of the HP EO by implementing the universal actions that promote equal opportunities and non-discrimination as a minimum to ensure the implementation of minimum activities promoting equal opportunities as a horizontal policy.
- To summarize the innovative examples of good practice in specific areas contributing to the implementation of the HP EO in all aspects and to disseminate the information on good practices through diverse information channels, addressing target groups in particular.

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