



OPERAČNÍ PROGRAM
LIDSKÉ ZDROJE
A ZAMĚSTNANOST

ANNUAL OPERATIONAL ASSESSMENT HREOP 2012

Final Report

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1 MANAGERIAL SUMMARY

This Final Evaluation Report represents a synthesis of results achieved within the evaluation project “Annual Operational Assessment of the Human Resources and Employment Operational Programme in 2012” where the key objective was to evaluate the progress of the HREOP in 2012. The project activities were launched in November 2012 and terminated in June 2013. The evaluation was prepared by IREAS Centrum s.r.o.

The Report also provides a comprehensive summary of general and particular evaluation recommendations.

The evaluation assignment included 3 tasks:

1. Prepare evaluation materials for 2012 HREOP Annual Report.
2. Prepare evaluation studies of 30 HREOP projects.
3. Evaluate the outcomes and results of projects in Priority Axis 5 including an evaluation of the effect of the implementation of innovation and partnership principles on these outcomes and results.

All 3 tasks have been successfully addressed by the research team. When dealing with the assignment, the research team used several different types of methods:

- Basic analysis (analysis of programme materials, analysis of basic data)
- Questionnaire surveys
- Controlled interviews
- Case studies
- Cluster analysis
- QCA

The Final Evaluation Report encompasses, as a separate document, a technical report that contains methodological details, instruments and individual outcomes.

Task 1 results: Evaluation of the progress of the HREOP in the context of the preparation of materials for 2012 HREOP AR

Analyses performed and the update of 2011 HREOP Annual Report show that the implementation of individual areas of support of the HREOP remains highly necessary and important in 2012 in respect of the financing of national strategies for employment and social inclusion and in respect of addressing the current situation in the labour market. According to the evaluator, calls launched in 2012 cover all priority axes and areas of activity to enable the projects that were and will be submitted within them to contribute to the

fulfilment of the Programme's global objective and specific objectives of individual priority axes and areas of support. The broad scope of the calls is desirable in terms of the fulfilment of the defined objectives and creates sufficient space for preparing projects according to the particular needs of the target groups.

The HREOP significantly contributes to the fulfilment of the quantified objectives of the National Reform Programme of the CR (NPR) for employment as well as social inclusion and fight against poverty, which were determined in consideration of the objectives of Europe 2020, following the specific recommendations of the Council for the CR.

By the end of 2012, 1 248 673 persons were supported through HREOP projects, which includes participants of comprehensive assistance programmes and one-off training programmes, and a total of 52 908 jobs were created. Moreover, between 2011 and 2012, the number of new jobs increased by about 10 thousand. Regarding the worsening economic situation and the decline in normal job opportunities, the created jobs consist overwhelmingly of community work jobs within the National Anti-Crisis Project (NPP).

In the context of the socioeconomic development in the CR, it was proposed to revise the HREOP in the form of reallocations between the Programme's priority axes; reallocations from the EC OP were proposed as well. The reallocated funds went to Priority Axis 2. The strategy defined in the HREOP is still relevant and functional with respect to the recent socioeconomic development but increasing emphasis will be placed on dealing with unemployment.

Supporting analyses were prepared as a part of Evaluation Task 1 to explain in more detail progress in the fulfilment of selected indicators, namely the application of QCA to indicator 070200 – Number of Newly Created Jobs for Disadvantaged Groups – Total. Further, monitoring indicators were evaluated on a sample of finished projects in all priority axes. QCA results show that most often the combination of variables "legal form of recipient" and "number of employees" leads greatly significantly to the high fulfilment of the monitoring indicators. As for the legal form, limited liability companies turn out to have a major impact; they are one of the most common applicants for projects committed to the fulfilment of MI 070200. As for the company size measured by the number of employees, it is obvious that medium-sized firms contribute to the fulfilment of the MI much more than micro businesses.

An analysis of the system of indicators implied that the setting of the target values of the MI was the least appropriate in projects within areas of support 1.1 and 4.1. The values of the MI were mostly set in an expectation of a higher interest of the target group. The indicators that were the most difficult for the recipients to fulfil include Number of Newly Created / Innovated Products (especially PO 1 and PO 3). A specific indicator that was perceived as problematic by the recipients was Number of Newly Created Jobs for Disadvantaged Groups – Total.

Task 2 results: Preparation of evaluation studies of 30 HREOP projects

Evaluation Task 2 – the most challenging one as to the breadth and depth of the research and the methodology applied – focused on the preparation of case studies. There were a total of 30 case studies of already finished projects pre-identified by the client as relatively “trouble-free” and suitable for the evaluation of potentially “promising” results. Further, the evaluator prepared 10 in-depth analyses of problematic issues shown by case study findings.

For purposes of triangulation in the evaluation of actual results, the evaluator used, in addition to desk-research and interviews with project managers, a questionnaire survey for target groups and where possible verified their situation in the labour market in cooperation with the ČSSZ.

Out of the 30 projects under evaluation, 19 projects were assessed as “notably successful” (i.e. they proved to have an added value other than the (obligatory) fulfilment of quantifiable indicators). As for the fulfilment of quantifiable objectives, all projects under evaluation can be deemed successful. Nevertheless, the evaluation studies revealed certain problem areas that complicate either the implementation of projects or the possibility to evaluate more deeply their real effects. The below 10 problem areas were identified and further analysed:

1. Inappropriate focus of course subjects with respect to: a) achievement of project goals; b) target groups
2. Cooperation with users of project results as a key factor for ensuring positive effects
3. Flexibility in the support from public authorities during their reorganization
4. Public support issues in projects targeted at creating new special purpose jobs in the private sphere and related ban to create special purpose jobs in public administration
5. Harmony between national AEP activities and EU support schemes (loss of support efficiency due to compliance with the project principle)
6. Identification of projects results in relation to supported persons and records of target groups
7. Legislative barriers associated with the establishment of corporate child care facilities
8. Cooperation of support recipient in project evaluation
9. Complicated cooperation between public authorities and institutions in evaluating projects and the Programme
10. Minimum information value of indicators

The evaluator formulated relevant recommendations to the above areas, directed at the subsequent programming period 2014+.

Controlled interviews with project implementers further showed that the projects worked (only) implicitly with a certain degree of application of a theory of change. However, the

projects' theory of change was not always duly substantiated. The most frequent weak points in the implicit theory include, in particular, an evaluation of the need for a project and of the subsequent interest of the target group, and sustainability of project results; yet according to the QCA (Qualitative Comparative Analysis) performed by the evaluator, these are the most vital factors for achieving successful project results. Therefore, these factors will need great attention. The implementation part of the projects' implicit theory of change, i.e. the choice of inputs, activities and outputs was appropriate in most case studies and was functional.

A cluster analysis was carried out to establish certain shared features and to find groups of similar projects. With it, three (four, in fact) main project groups were identified according to results achieved and a criterion was found on which basis it is possible to distinguish between individual projects in terms of results achieved.

Extraordinary results are achieved by projects in the area of active employment policy. The best scores can be found in projects directed at placing individuals in the labour market or at creating jobs for specific target groups. It is worth noting that these projects focus on achieving results (i.e. creation of jobs and effective placement of individuals in the labour market). Such an ambitious goal of the applicants is based on deep knowledge of the environment and an ability to exploit the available social capital in favour of a project.

Lower probability of a particularly positive assessment is visible in projects targeted at improving employability (typically requalification), i.e. projects concentrated on achieving outputs (in particular, training of a defined number of persons). This is because the different nature of the goals of these projects leaves significantly less space for achieving excellence.

The lowest probability of an excellent assessment can be found in projects of "less experienced" applicants and in projects built de facto from the foundations up (see corporate child care facilities). Although particularly positive results may be expected in these projects in the long-term, only six out of ten projects received a particularly positive assessment due to their often intricate and complicated start-ups.

In a general conclusion, important factors for the estimation of a project's future success are nature of the indicators (output × result) and an applicant's previous experience in the area.

Task 3 results: Evaluation of outputs and results within Priority Axis 5

To evaluate the outputs and results of PA5 projects, the research team first basically examined the focus of the projects according to the data in MONIT7+, which was followed by a questionnaire survey on "dissemination, sustainability, initiation, partnership" in running and finished projects (P45 and P5). On this basis, the research team produced an ad-hoc opinion for the client in late January 2013 that became supporting evidence for the

formulation of the planned call for the mainstreaming of results and outputs of implemented PA5 projects.

Subsequently, PA5 projects were clustered by target groups/specific issues. The methodology was based on the evaluation procedures defined in the Evaluation of the Fulfilment of the Innovation Principle in the HREOP; this methodology for evaluating the level of innovation was revised and adjusted to the specific needs of the evaluation of international PA5 projects. Out of these projects, generally the best results were achieved, based on a multi-criterion assessment, by projects focused on social business, ethnic minorities, Roma, socially excluded localities and people with mental disorders. The lowest scores were received by clusters of projects focused on local partnerships, victims of domestic violence, life crisis situations and employment agencies / employment concepts.

The effect of the implementation of the innovation principle on outputs and results achieved in PA5 projects was monitored in projects where created innovations were tested through various pilot training courses for selected target groups and the effect of innovation on outputs and results was verified by determining the situation of supported persons in the labour market in cooperation with the ČSSZ. Here, a single project was identified which focused on social business and which kept adequate records of the supported representatives of the target groups. The success of the supported persons in this PA5 innovation project was extraordinarily high and reached 62.79% seven months after the project termination. However, another such project that was tested within area of support 3.3 in 2012, reached only 27.27%. Based on the analysis carried out it can be concluded that the effect of the implementation of the innovation principle on the outputs and results achieved in this project was significantly higher than in other such mainstream projects in comparable areas of support of the HREOP. Only two of the other finished projects evaluated had a low impact of innovation on results achieved. The effect of the implementation of the partnership principle on outputs and results achieved in PA5 projects is usually more easily identifiable in cases where projects are directed at specific forms of innovations and their testing/verification on the relevant representatives of the target groups in the Czech practice. During the preparatory work on projects proposals, the final recipients did not mention, in any way, the formation of partnerships in approximately 2/3 of project applications. During the implementation of projects, international partners were involved, in most cases (about 50 – 60%) across all clusters of projects, in the form of innovation transfers without any adaptation to the Czech conditions. The role of their Czech partners (if involved) was therefore reduced to the verification of the possibility to apply the innovations in the Czech conditions. The ex-post involvement of the partners was somehow described in about 40% of all PA5 projects. The remaining 60% of projects did not specify the continuation of the partnerships after the termination of the projects at all.

On the basis of the desk-research of implemented PA5 projects, it is possible to define an axiom, i.e. “specific” results of international cooperation projects create conditions for “specific” forms of follow-up cooperation. In international cooperation projects where the activity has a more general focus (e.g. seminars, workshops, internships, conferences), the final recipients usually incline to general and vague formulations in relation to the further potential for cooperation development.

The micro-studies of the 15 best assessed projects according to the revised methodology for evaluating innovation also showed that the focus and current experience of the final recipients were highly important for the prospective success of the outputs and results of international cooperation projects. If the activity of entities had involved work with representatives of target groups in the long-term, the projects had a higher potential to apply the outputs in practice. The best results were thus achieved by projects focused on:

- social business – e.g. an innovative project directed at transit social businesses for target groups of persons with drug addiction experience and persons who had served a sentence in prison. There is substantial interest in these issues in the CR; however, there is a lack of deeper experience.
- ethnic minorities/Roma/socially excluded localities – the main advantage was the resolution of specific local needs and related problems of ethnic minorities in the form of precisely formulated innovations or new instruments. The expert interview implied that the current situation had not been quite adequately handled in terms of raising awareness of particular PA5 outputs (e.g. Ethnic Friendly Employer) which are usually impossible to be seen in practice. In such a case, education should not concentrate solely on private firms but also on school facilities and non-governmental organizations.
- people with mental disorders/illnesses – these were cases where *peer consultants were involved in the care for the mentally disordered/ill* who should be systematically educated and employed as lay therapists and in relation to whom there should be systematic work with the employers and future co-operators of the peer consultants.

Certain extraordinary projects with high scores were also in clusters “50+ job applicants”; “improvement of the capacities of local self-governing units, improvement of the capacities of non-governmental organizations”; “harmonization of family and professional life”.

For projects that were not described as the “best”, an overview of their major outputs/results was prepared together with a brief justification of why these projects are not suitable for mainstreaming in 2014+. They mostly include clusters of projects focused on local partnerships, victims of domestic violence / life crisis situations and employment agencies / employment concepts. These project groups received only average and below-average scores in the assessment. The very minimum contribution of these projects can be identified in terms of their novelty and improvement and involvement of representatives of target groups which were affected by the projects’ outputs only indirectly and to a rather

limited extent. Projects directed at employment agencies and related concepts received very low scores in terms of their targeting, involvement of representatives of target groups and, to a very limited extent, dissemination concepts.

2 INTRODUCTION

This document represents an output of the Annual Operational Evaluation HREOP 2012. The Final Report of the project that ran from November 2012 to June 2013 sums up the results of three evaluation tasks and answers to each of the evaluation questions.

Evaluation Task 1 is directed at assessing the overall progress and the current statuses of monitoring indicators including an interpretation of the values and an identification of the major developmental trends. An important part of the task is an estimation of the further development and an identification of possible weak points where the Programme's progress should be accelerated or adjusted. Task 1 outputs formed an evaluation input for the 2012 HREOP Annual Report and, as such, were delivered to and accepted by the client already in March 2013.

Evaluation Task 2 focuses on in-depth analyses of selected, already implemented projects. The case studies are followed up with an elaboration of ten problem areas identified in the preparation of the case studies.

Evaluation Task 3 is directed at the outputs and results of projects under Priority Axis 5 including an assessment of the effect of the implementation of innovation and partnership principles on these outputs and results.

This Report includes four separate annexes:

1. Annex 1. Evaluator's Input for the Annual Report on the Implementation of the 2012 Human Resources and Employment Operational Programme. (part of Evaluation Task 1).
2. Annex 2. Case studies of 30 projects implemented within the HREOP. These projects were selected by the client.
3. Annex 3. Elaboration of Problem Areas Identified in the Preparation of Case Studies.
4. Annex 4. Micro-Studies of the Best Assessed Projects in PA5

3 METHODOLOGY

The research team tackled the assignment by combining several methods that ensured the achievement of better results and the triangulation of methods. The evaluator used both qualitative and quantitative methods of survey and assessment.

Data collection used both primary and secondary information sources. **Primary information sources** were:

- Data from a questionnaire survey. The questionnaire survey was used in Task 1 where questionnaires were answered by project managers of individual areas of support, and in Task 2 where the questionnaire survey was employed for obtaining information from target groups which had participated in the projects.
- Information from controlled interviews with project implementers.
- Technical consultations with the representatives of the HREOP MA and other experts.

The research team used also **secondary sources** including in particular:

- Data from the monitoring system
- Data from previous surveys or evaluation reports
- Data from surveys carried out by project implementers
- Data from annual reports and programme documents
- Statistical data
- Data from the social insurance system of the ČSSZ.

Fundamental **evaluation methods** used in dealing with the evaluation assignment were:

- Basic analysis (analysis of programme materials, analysis of basic data)
- Questionnaire survey
- Controlled interviews
- Case studies
- Cluster analysis
- QCA

For more information on the methodology for dealing with the assignment refer to a separate technical report: 2012 Annual Operational Assessment.

4 ADDRESSING INDIVIDUAL EVALUATION TASKS

4.1 *Evaluation of Task 1: Prepare evaluation materials for the 2012 HREOP Annual Report*

The following three evaluation questions were defined as part of Evaluation Task 1.

EQ 1.1: WHAT PROGRESS WAS MADE IN 2012 IN RELATION TO THE PLANNED VALUES OF THE MONITORING INDICATORS INCLUDING THE LISBON INDICATORS?

EQ 1.2: WHAT PROGRESS WAS MADE IN 2012 IN RELATION TO THE FULFILMENT OF THE GENERAL OBJECTIVES OF THE COHESION POLICY, TASKS OF THE ESF, GENERAL STRATEGIC GUIDELINES OF THE COMMUNITY AND THE NSRF, HORIZONTAL ISSUES OF THE EU AND GROWTH AND EMPLOYMENT GOALS OF THE EU, OR, WHERE APPLICABLE, OTHER CURRENT STRATEGIC GOALS AT THE LEVEL OF THE CR AND THE EU?

EQ 1.3: WAS THERE ANY DEVIATION FROM THE INITIALLY DETERMINED OBJECTIVES OF THE PROGRAMME IN 2012 REQUIRING A CORRECTION OF THE OPERATIONAL PROGRAMME, PROGRAMME PRIORITIES OR CALLS LAUNCHED, AS A RESULT OF SIGNIFICANT SOCIOECONOMIC CHANGES, PARTICULARLY WITH REGARD TO LONG-TERM UNEMPLOYMENT, GENDER EQUALITY, REDUCTION OF INTER-REGIONAL DIFFERENCES AND ABSORPTION CAPACITY IN PROBLEM REGIONS ETC., OR THE NEED TO REFLECT, MORE EXTENSIVELY OR DIFFERENTLY, SIGNIFICANT CHANGES IN COMMUNITY PRIORITIES OR NATIONAL OR REGIONAL PRIORITIES, OR DIFFICULTIES IN THE IMPLEMENTATION? FURTHER, IF THERE WAS ANY DEVIATION, WHAT DO YOU RECOMMEND TO DEAL WITH THE SITUATION?

The answers to these questions were provided in a summarized form regarding the required nature of the main output of the evaluation task, which was an input for the HREOP Annual Report.

The purpose of Evaluation Task 1 was to assess the physical progress in the whole Programme and in all priority axes save Technical Assistance (or areas of support). The physical progress was assessed in relation to the initially determined objectives of the Programme and with respect to the socioeconomic and political development in the CR and the fulfilment of strategic goals at the level of the CR and the EU. The outputs of the evaluation task were in the nature of updated parts of the 2012 HREOP Annual Report (AR) and follow-up detail analyses (e.g. assessment of the system of indicators, application of QCA etc.) Detailed inputs to the AR are specified in separate Annex 1; below is just a summary.

The analyses for the AR showed that the implementation of the areas of support of the HREOP was still highly essential in 2012 and important for the funding of national employment and social inclusion strategies and for dealing with the current situation in the labour market. According to the evaluator, calls launched in 2012 cover all priority axes and areas of support to enable projects that were and will be presented within them to contribute to the fulfilment of the global objective of the Programme and the specific objectives of individual priority axes and areas of support. The broad scope of the calls is desirable for the fulfilment of the determined objectives and provides sufficient space for the preparation of projects according to the specific needs of the target groups.

The negative effects of the economic crisis further deepened during 2012 when the unemployment rate reached as high as approximately 9.5% at the turn of 2012 and 2013. According to Czech National Bank forecasts, unemployment can be expected to increase in 2013, which is related, among others, to the expected decrease in the GDP.

In this context, it is obvious that the HREOP significantly contributes to the fulfilment of the quantified objectives of the National Reform Programme of the CR (NPR) for employment and social inclusion and fight against poverty, defined in consideration of the objectives of Europe 2020, following the specific recommendations of the Council for the CR:

- The HREOP contributes to the goal of achieving 75% of the overall employment rate in the CR in 2020 through all priority axes. By the end of 2012, 1 248 673 persons were supported from HREOP projects, which includes participants in both comprehensive assistance programmes and one-off training programmes, and 52 908 jobs were created. Moreover, the number of new jobs increased by about 10 thousand between 2011 and 2012. Regarding the worsening economic situation and the decline in normal job opportunities, the created jobs consist overwhelmingly of community work jobs within the National Anti-Crisis Project (NPP). This was reflected in the overall employment indicator for the CR and it may be assumed that the HREOP had significantly contributed to the increase: the employment rate increased year on year by 0.8 pp in 2012. It now reaches 72%.
- The positive effects of the HREOP (clear from possible external influences) on employment in supported small and medium-sized businesses and the positive effects on the results of operation in supported medium-sized and large firms are suggested by the interim outputs of the contrafactual evaluation of the impacts in area of support 1.1 Increase in Employee Adaptability and Enterprise Competitiveness; final results will be specified in 2014 on the basis of further inquiries.
- Out of the total number of supported persons in the HREOP, there were 637 019 women. Therefore, a substantial contribution of the HREOP can be expected also in the indicator of women's employment. The target value of 65% had not been

achieved yet (the current value was 62.8%); nevertheless, it significantly increased year on year by 1 pp and the influence of the HREOP is obvious. Projects in area of support 3.4 Equal Opportunities for Women and Men in the Labour Market and Harmonization of Family and Professional Life fully reflect the related recommendations of the Council – they cover activities for ensuring child care services, consultancy on corporate personnel policy and pro-family work conditions including flexible forms of work etc.

- The goal to increase the employment rate of older persons (55-64 years) to 55% is contributed primarily by axis 2 Labour Market Active Policies, axis 1 Adaptability and axis 3 Social Integration and Equal Opportunities. A total of 46 683 persons of 55-64 years of age were supported through the HREOP. A comparison of the situations in 2011 and 2012 showed a very significant increase in the supported persons from this group. The employment rate of older persons in the CR grew from 47.6% (2011) to 50.4% (2012), which was a difference of 3.9 pps compared to 2010.
- The goal to decrease the unemployment rate of young persons (15-24 years) by one third compared to 2010 is most contributed by axes 2 and 3. The Programme supported a total of 42 473 young persons in 2012. The registered unemployment rate of young persons (15-24 years) was 20.3% in 2012, having decreased by 2.7 pps compared to 2011.
- The goal to decrease the unemployment rate of low qualified persons (ISCED 0-2) by one quarter compared to 2010 is most contributed by axes 2, 3 and 1. A total of 74 016 low qualified persons were supported by the end of 2012¹.
- The fulfilment of EU's and CR's strategic goals in the area of social inclusion and fight against poverty is most contributed, among others, by axis 3. A total of 95 623 inactive persons were supported in the Programme by the end of 2012: 10 246 minority persons, 9 298 migrants, 15 669 disabled persons, 31 999 persons from other disadvantaged groups, 74 016 low qualified persons.
- Having reached 11.4% (2011) with respect to the lifelong learning indicator identifying the share of persons of 25-64 years of age participating in lifelong learning, the Czech Republic is close to the EU 15 average (10.0%). It is a jump increase: the participation had doubled compared to the long-term below-average values of 2007, and it is reachable almost exclusively through the implementation of HREOP projects.

In the context of the socioeconomic development in the CR, it was proposed to make revisions of the HREOP to which the evaluation team provided a feedback and an external assessment of the relevance of the proposed changes. The revisions were proposed in the

¹MI 074141 "Number of Supported Persons – Basic, ISCED 1 and 2"

form of reallocations between the Programme's priority axes; reallocations from the EC OP were proposed as well. The reallocated funds went to Priority Axis 2. In the context of the above information of the development to date, the progress and potential changes in the labour market, it must be noted that the funds reallocated to PA2 can help in dealing with unemployment.

The strategy defined in the HREOP is still relevant and functional with respect to the recent socioeconomic development but an increasing emphasis will be placed on dealing with unemployment. The socioeconomic development is still affected by the ongoing economic crisis towards which calls under the Programme were oriented already in the previous year and will be continued in 2013 with respect to the reallocations.

Supplementary analyses

Supplementary analyses were carried out within Evaluation Task 1 to explain in more detail the fulfilment of selected indicators. Specifically, it was the application of the QCA to indicator 070200 – Number of Newly Created Jobs for Disadvantaged Groups – Total. Further, monitoring indicators were assessed on a sample of finished projects in all priority axes. The main results of both analyses are specified below and details of the context can be found in the technical section of the Final Report.

The QCA proved that the observed variables contributed to the observed phenomenon (fulfilment of indicator 070200) on average with more than 60%. It is evident that not all variables had been established. Nevertheless, the analysis results were extended to include results of a questionnaire survey that was to identify experience and barriers in the fulfilment of indicator 070200. The QCA results were commented on also in connection with this qualitative survey. The QCA results themselves show that most often the combination of variables "legal form of recipient" and "number of employees" leads greatly significantly to the high fulfilment of the monitoring indicators. When looking at particular data, limited liability companies turn out to have a major impact in relation to the legal form; they are one of the most common applicants for projects committed to the fulfilment of MI 070200. As for the company size measured by the number of employees, it is obvious that medium-sized firms contribute to the fulfilment of the MI much more than micro businesses. However, there is no direct proportionality: the analysis shows that firms with the highest numbers of employees do not have the highest values of the MI (by recipients with 20-50 employees contribute the most).

The influence of the sector (NACE) and the financial turnover of the recipients also turns out to be important in certain combinations. However, these are not sufficient conditions. In both variables, the effects of the two factors correspond to the original assumptions, i.e. better fulfilment of the indicator is registered in companies engaged in activities of children and youth organizations, other education and activities of other organizations associating

persons to advance joint interests not specified elsewhere. As for the financial turnover, the relation is not so causal but it was generally found that companies with higher turnovers created higher numbers of jobs for disadvantaged persons. Companies with turnovers of CZK 10-50 million contributed the most. However, the contribution tends to decrease with turnovers higher than those mentioned.

The factor of the community size of the recipients seems to be less relevant. Although it may be assumed that larger urban units generate a higher demand, they have only little effect on MI 070200. A possible explanation is that they were locations where projects were implemented; actual jobs for disadvantaged groups of citizens might have been created in other urban units.

The results of the questionnaire survey then suggest that there is a relation between problems related to the implementation of this MI and inappropriate quantification of the target situation. It is therefore obvious that a part of the applicants came into difficulties due to an insufficient analysis of the need and the wrong setting of the estimated value of newly created jobs for disadvantaged citizens. Moreover, a qualitative survey showed that the recipients registered a change in the demand of the target groups as one of the barriers in the fulfilment of the MI.

An evaluation of monitoring indicators was an additional task within Evaluation Task 1. The purpose was to provide information, through a qualitative approach, of the fulfilment of indicators in a group of successfully finished projects. The overall results show slight differences between individual areas of support. The major differences include:

- The ex-post evaluation shows that the target values of the monitoring indicators were the least appropriately defined for projects in areas of support 1.1 and 4.1. The values of the monitoring indicators were mostly set in expectation of the greater interest of the target groups. Controlled interviews suggest that these projects often lacked a thorough analysis of the need/demand.
- Indicators that were the most difficult for the recipients to fulfil include the Number of Newly Created / Innovated Products (especially PO1 and PO3). A specific indicator that was perceived as problematic by the recipients was the Number of Newly Created Jobs for Disadvantaged Groups – Total. This was confirmed at the level of whole Priority Axis 3 and the target value had to be corrected due to the insufficient fulfilment.
- In their ex-post evaluation, the recipients of finished projects generally tend to assess the time and organizational effort put into monitoring in negative terms. The worst results in this evaluation are reported for Priority Axis 4.

4.2 Evaluation of Task 2: Prepare case studies of 30 HREOP projects

Evaluation Task 2 focused on the preparation of case studies. A total of 30 case studies were prepared within task 2; they were complemented by 10 more case studies of bad practice. By agreement with the client, these 10 case studies had a form of in-depth analyses of selected issues that had resulted from the preparation of the 30 basic case studies. The case studies themselves that were prepared as part of addressing Evaluation Task 2 form a separate Annex 2 to this Final Report. In cooperation with the client, the research team identified projects whose representatives were subsequently contacted with a request for assistance in the preparation of the case studies.

In the preparation of the case studies, the research team identified 10 problem areas the analyses of which were further developed and are included in separate Annex 3 to this Report

1. Inappropriate focus of course subjects with respect to: a) achievement of project goals; b) target groups
2. Cooperation with users of project results as a key factor for ensuring positive effects
3. Flexibility in the support from public authorities during their reorganization
4. Public support issues in projects targeted at creating new special purpose jobs in the private sphere and related ban to create special purpose jobs in public administration
5. Harmony between national AEP activities and EU support schemes (loss of support efficiency due to compliance with the project principle)
6. Identification of projects results in relation to supported persons and records of target groups
7. Legislative barriers associated with the establishment of corporate child care facilities
8. Cooperation of support recipient in project evaluation
9. Complicated cooperation between public authorities and institutions in evaluating projects and the Programme
10. Minimum information value of indicators

The purpose of developing these problem areas was to point out complications encountered either by the support recipients or the evaluator. The problem areas were described using a relevant case study example, generalized and a basic analysis of the causes of these situations was made. Subsequently, the evaluator attempted to offer guidance for dealing with these problem areas.

EQ 2.1 HOW DO YOU ASSESS SPECIFIC SCORES A) INDIVIDUALLY FOR EACH PROJECT
B) AGGREGATELY FOR ALL PROJECTS AND GROUPS OF THEMATICALLY RELATED
PROJECTS ASSESSED?

A) Assessment of results of individual projects

A total of 30 case studies were prepared as part of addressing Evaluation Task 2. The assessments of the results of specific projects are always provided in more detail in individual case studies that form Annex 2 to this evaluation report. These case studies specify individual factors of success or weak points in the implementation of the projects. In most case studies, the evaluator built on monitoring reports, in-depth interviews with recipients, a questionnaire survey among the target groups and its own assessment of the projects' results.

Since all the projects under evaluation met the outputs and monitoring indicators required, the research team had to proceed to a more detailed analysis to assess the success of individual projects. Each of the projects was therefore discussed in the evaluation team and expertly assessed by five experts as to whether the results had been met as such (i.e. a project had achieved the goal) or whether the results of a project were above standard. In doing so, the expert team did not build on monitoring indicators that had been met by all projects but on a comprehensive assessment that took into account the quality and usability of the results, sustainability, innovation and, where applicable, other factors.

Finally, 18 projects out of 30 selected examples of good practice were identified as notably successful (case studies with ordinal numbers 1, 2, 3, 5, 6, 9, 10, 14, 16, 17, 19, 20, 21, 22, 23, 24, 26 a 29).

The remaining 11 projects "had merely achieved" their goals as expected. Therefore, none of these remaining projects can be identified as unsuccessful. However, certain weak points were found in these projects and mentioned in the case studies. Some of these weak points were then developed in relation to problem areas, insofar as they were generally applicable.

Table 1 – Overview of case studies prepared within AOA 2012

Study number	Area of support	Project number	Project name	Implementer	Link to the bad practice analysis (number and name of the problem area)
1*	1.2	CZ.1.04/1.2.00/37.00005	Restart for Česká Lípa	Employment agency in Česká Lípa	
2*	2.1	CZ.1.04/2.1.01/44.00016	Targeted measures in the labour market in the Zlín Region	Euroface Consulting, s.r.o.	
3	3.4	CZ.1.04/3.4.04/54.00202	Child care no longer a problem	Vítkovická nemocnice a.s.	Problem Area 7: Legislative barriers associated with the establishment of corporate child care facilities
4*	3.4	CZ.1.04/3.4.04/26.00328	Equal opportunities for women and men in a community library in Vsetín – partnership and a healthy community – lifelong learning – prosperity	Masarykova veřejná knihovna Vsetín	
5	1.2	CZ.1.04/1.2.00/37.00009	Restart means a new chance	Employment agency in Česká Lípa	
6	2.1	CZ.1.04/2.1.00/13.00044	Education – practice – employment	Employment agency of the CR in Brno	Problem Area 1: Inappropriate focus of course subjects with respect to a) achievement of project goals; b) target group Problem Area 4: Public support issues in projects targeted at creating new special purpose jobs in the private sphere and related ban to create purpose specific jobs in public administration
7	2.2	CZ.1.04/2.2.00/11.00009	Staffing and expertise to ensure implementation of active employment policy in employment agencies	Project Management Department of the Ministry of Labour and Social Affairs of the Czech Republic	Problem Area 3: Flexibility in the support from public authorities during their reorganization
8	3.1	CZ.1.04/3.1.02/43.00039	Better social integration of foreigners by teaching them Czech	VOLONTÉ CZECH, o.p.s.	Problem Area 6: Identification of projects results in supported persons and records of target groups
9	3.2	CZ.1.04/3.2.01/19.00121	Field social work in a socially excluded Roma locality in Orlová - Poruba	Town of Orlová	

10	3.3	CZ.1.04/3.3.05/56.00025	Development of work therapies of Denní centrum Barevný svět	DENNÍ CENTRUM BAREVNÝ SVĚT	
11	3.4	CZ.1.04/3.4.04/26.00003	Harmony in the family, harmony in the workplace	Inovační technologické centrum - VÚK, a. s.	Problem Area 7: Legislative barriers associated with the establishment of corporate child care facilities
12	4.1	CZ.1.04/4.1.01/57.00045	More effective management of the municipal office of Příbor through good education and implementation of modern methods	Town of Příbor	
13	5.1	CZ.1.04/5.1.01/51.00046	Estimating educational needs in the Regions of the CR	RESEARCH INSTITUTE FOR LABOUR AND SOCIAL AFFAIRS	Problem Area 2: Cooperation with users of project results as a key factor for ensuring positive effects
14	2.1	CZ.1.04/2.1.00/13.00065	Employment SUPPORT in socially excluded localities in Most	Employment agency of the CR in Ústí n. Labem	
15	2.1	CZ.1.04/2.1.00/13.00025	Carrier after fifty years of age	Employment agency of the CR	
16	2.1	CZ.1.04/2.1.01/63.00051	Comprehensive guidance and education scheme with creation of jobs	VSE a.s.	
17	2.1	CZ.1.04/2.1.01/44.00040	A step to employment	Síť mateřských center	
18	2.1	CZ.1.04/2.1.01/63.00222	Offer of requalification courses: double-entry accounting, single-entry accounting, payroll accounting and personnel management	Centrum ekonomického vzdělávání Ostrava, o.p.s.	Problem Area 8: Cooperation of support recipient in project evaluation
19	2.1	CZ.1.04/2.1.00/13.00036	Chance for parents	Employment agency of the CR in Zlín	
20	3.3	CZ.1.04/3.3.05/56.00086	Funnel - a comprehensive system of instruments leading to labour market integration of socially excluded persons	Kvalifikační a personální agentura, o. p. s.	

21	3.1	CZ.1.04/3.1.02/43.00071	A good job	Krok, o.s.	
22	3.4	CZ.1.04/3.4.04/54.00250	University child care facility Qočna and child day care centre Koala	UTB ve Zlíně	
23	3.4	CZ.1.04/3.4.04/26.00011	Corporate child care facility LINET	LINET spol. s.r.o.	Problem Area 7: Legislative barriers associated with the establishment of corporate child care facilities
24	3.4	CZ.1.04/3.4.04/54.00192	University child care facility and club for preschoolers	Palacký University in Olomouc	
25	2.1	CZ.1.04/2.1.01/63.00073	The first start – education and employment of persons of up to 25 years of age	Centre of Lifelong Education	
26	3.1	CZ.1.04/3.1.02/43.00085	Occupational and social activation of people with mental disorders and long-term mental illnesses	ENERGIE o.p.s.	
27	2.1	CZ.1.04/2.1.00/03.00003	Guidance and requalification	Project Management Department of the Ministry of Labour and Social Affairs of the Czech Republic	Problem Area 5: Harmony between national AEP activities and EU support schemes (loss of support efficiency due to compliance with the project principle) Problem Area 9: Complicated cooperation between public authorities and institutions in evaluating projects and the Programme
28	2.1	CZ.1.04/2.1.00/03.00003	Guidance and requalification	Employment agency in Kutná Hora	Problem Area 5: Harmony between national AEP activities and EU support schemes (loss of support efficiency due to compliance with the project principle) Problem Area 9: Complicated cooperation between public authorities and institutions in evaluating projects and the Programme
29	2.1	CZ.1.04/2.1.00/03.00003	Guidance and requalification	Employment agency in České Budějovice	Problem Area 5: Harmony between national AEP activities and EU support schemes (loss of

					support efficiency due to compliance with the project principle) Problem Area 9: Complicated cooperation between public authorities and institutions in evaluating projects and the Programme
30	2.1	CZ.1.04/2.1.01/63.00014	Education and active support for job applicants and seekers in pharmaceutical and health care industries	Androsa, s. r. o.	

Legend:

* projects prepared as a follow-up to the studies prepared in AOA 2011

Studies highlighted in blue were identified as notably successful when assessed by the evaluation team

Studies No. 5-12 were used for the 2012 HREOP AE.

B) Aggregate assessment of the projects

As regards the achievement of projects' outputs as were presented in project applications and which the implementers undertook by contract to achieve, it can be concluded that all projects evaluated achieved their stated goals – at least to the extent that the values of the proposed and observed monitoring indicators were met.

Each of the projects can therefore be assessed as successful in that the values of the monitoring indicators were met and all of the planned outputs were achieved.

Since only small differences among individual projects were traced as to the fulfilment of the basic indicators, the evaluator pursued efforts to differentiate the projects on the basis of a broader spectrum of indicators. A cluster analysis was carried out to establish certain common features and to find groups of similar projects. With it, three (four, in fact) main project groups were identified according to results achieved (see below) and a criterion was found on the basis of which it is possible to distinguish among individual projects in terms of results achieved. Relevant features of individual projects were first defined within a cluster analysis. These features were chosen both with respect to the general objectives of the Annual Operational Assessment (in particular, ensuring sustainability, characteristics of the results and impacts of individual case studies, project success) and to help take into account natural differences among projects (among others, type of activity of the implementer, nature of the target group, project changes during the project implementation etc.). An effort to reflect some of the important attributes of the implementers' approach to the projects evaluated (previous experience with target groups, knowledge of the needs of target groups etc.) played a significant role in constructing the features and choosing record categories.

In particular, the following features were used for the purposes of the cluster analysis:

- project success (normally successful × extraordinarily successful)
- previous work with the target group
- knowledge of the needs of the target group
- properly defined activities
- adequately selected inputs
- self-implementation
- knowledge of the demand for results
- ensured sustainability
- target groups
- type of activities
- characteristics of outputs
- characteristics of results
- characteristics of impacts

- closed/open project (support for own employees of project implementer × support for other persons)
- project presenter
- project changes
- previous experience with implementing HREOP projects

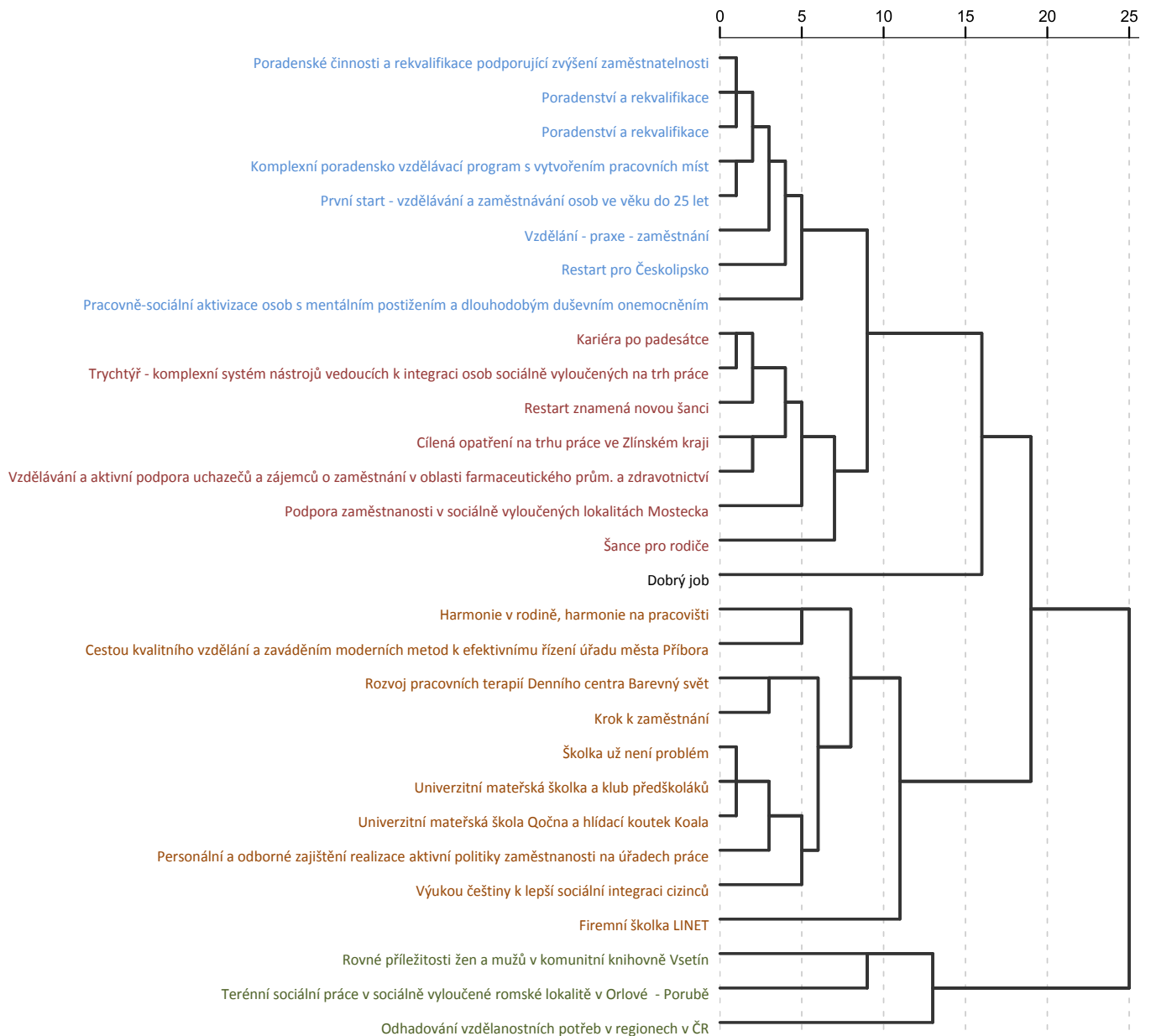
The result of the analysis that was based on the observed indicators is four groups of projects grouped according to the degree of similarity. The results show that the first group is formed by a majority of projects (not all of them) targeted at guidance and requalification activities. Although they are projects from different Czech Regions, their implementers generally have in common knowledge of the target groups and previous work with the target groups. Another important feature is that the project applications were self-prepared by the project implementers. Funds granted under the aid scheme were used by these entities to prepare and deliver requalification courses and to provide guidance services to the target groups. An important characteristic is that the activities carried out have a nation-wide potential – i.e. they can be performed in different contexts, for different target groups etc.

The second group is also dominated by projects that are focused on support for education and targeted measures in the labour market. Unlike the first group, this cluster comprises projects focused on specific target groups (older persons, socially excluded persons, persons working in pharmaceutical and health care industries). The preparation of projects for these narrow target groups is associated with many specifications in projects proposals (level of indicators, account of activities) as well as in project implementations (impacts achieved, possibility to comply with conditions for sustainability etc.).

The core of the third group of projects is formed by corporate child care facilities; all child care facility projects that were subject to assessment are grouped in this cluster. Nevertheless, the third group comprises also other projects (see the diagram) in addition to child care facilities; these projects are primarily targeted at harmonizing family and professional life. A frequently repeated characteristic (not necessarily a typical feature) of these projects is that the implementation team was built and started to operate only after the grant of the aid (the project application was mostly prepared by an entity other than the future implementer).

The fourth group should be understood as residual – it comprises projects so different from the others that they could not be included in any of the above mentioned groups. Moreover, the analysis of the structure of this cluster showed substantial heterogeneity confirming the specific nature of these projects.

Picture 1 – cluster analysis dendrogram



Source: own elaboration

Note: Typical groups of projects assessed are shown in different colours. These groups were created on the basis of a cluster analysis exploring the similarity of the above characteristics of individual projects. The vertical distances indicate the degree of similarity in the evaluation of specific projects. The shorter the distance, the higher the similarity.

The results of the cluster analysis suggest that extraordinary results are achieved by active employment policy projects. The best scores are received by projects grouped in the second cluster where there are projects directed at placing individuals in the labour market or at creating jobs for specific target groups. It is worth noting that these projects focus on achieving results (i.e. creation of jobs and effective placement of individuals in the labour market). Such an

ambitious goal of the applicants is based on deep knowledge of the environment and an ability to exploit the available social capital in favour of a project.

Lower probability of an extraordinarily positive assessment is visible in the first group where there are projects targeted at improving employability (typically requalification), i.e. projects concentrated on achieving outputs (in particular, training of a defined number of persons). This is because the different nature of the goals of these projects leaves significantly less space for achieving excellence.

The lowest probability of an excellent assessment is found in the third group where there are projects of “less experienced” applicants and projects built de facto from the foundations up (see corporate child care facilities). Although extraordinarily positive results may be expected in these projects in the long-term, only six out of ten projects achieved an extraordinarily positive assessment due to their often intricate and complicated start-ups.

In a general conclusion, important factors for the estimation of a project’s future success are nature of the indicators (output × result) and an applicant’s previous experience in the area.

EQ 2.2 HOW DO YOU ASSESS THE LEVEL OF IMPLICIT/EXPLICIT PRESENCE/ABSENCE AND FUNCTIONALITY OF A PROJECT’S THEORY OF CHANGE IN EACH OF THE PROJECTS? WHICH SPECIFIC AREAS, ELEMENTS AND CAUSAL LINKS OF THE THEORY OF CHANGE DO YOU CONSIDER THE MOST PROBLEMATIC OR, ON THE CONTRARY, THE MOST FUNCTIONAL A) INDIVIDUALLY IN EACH PROJECT B) AGGREGATELY IN ALL PROJECTS AND GROUPS OF THEMATICALLY RELATED PROJECTS ASSESSED?

It is necessary to point out immediately before dealing with this evaluation question that project applicants and implementers did not work with an explicit theory of change or that an explicit theory of change was not registered in any of the assessed projects on which the case studies were made.

However, controlled interviews with project implementers showed that the applicants implicitly worked with a certain degree of a theory of change. The causal links were not always duly substantiated though. The most frequent weak points in the implicit theory of change include, in particular, an evaluation of the need for a project and of the subsequent interest of the target group, and sustainability of project results. The implementation part of a project, i.e. the choice of inputs, activities and outputs, was appropriate in most case studies.

The effectiveness of expertly identified factors and their influence on whether a project was successful or notably successful was assessed using a fsQCA.

QCA

The main purpose was to evaluate the effects of individual factors that influence the overall success of projects. The research team monitored the presence and quality of individual elements of the theory of change, and causal links. Their influence on the results achieved by a project was evaluated by means of a fsQCA. This method enabled the team to assess which elements of the theory of change (their presence and quality) were key for the success of a project and the achievement of its goals.

Data collection

The project team exploited the following data sources to address this task:

- qualitative information from controlled interviews that was subsequently operationalized and calibrated into a fuzzy set;
- data from the monitoring system;

Identification of appropriate variables and their quantification

The project team applied the following procedure within this task:

- It identified and discussed possible elements (factors), using a sample of all 30 controlled interviews in selected projects, significant for the success of a project.
- For each factor, it defined values for operationalization and calibration into a fuzzy set.
- Individual evaluators should have subsequently assessed the degree of presence/absence of factors monitored for each of the projects (on the basis of prepared case studies and controlled interviews).
- fsQCA 2.5 was used for the assessment itself.

A hypothesis was established at the start of the assessment, envisaging that: Whether a project is successful or notably successful is influenced by knowledge of the needs and previous work with the target group, adequately selected activities and inputs for their implementation, knowledge of the demand for project results and ensured sustainability of subsequent activities. The least important influence can be expected from whether the crucial activities are carried out by the implementers themselves or via contractors.

The main dependent variable was the overall success of a project (expertly assessed by the evaluators who had prepared the case studies). As stated above, two stages of success were distinguished: “a successful project” and “a notably successful project”. Further, several factors and conditions were defined that played an important role for the success of a project. Theoretical bases are linked to individual independent variables. These are as follows:

- A. Previous work the target group
- B. Knowledge of the needs of the target group
- C. Properly defined activities
- D. Adequately selected inputs
- E. Self-implementation
- F. Knowledge of the demand for outputs
- G. Ensured sustainability

Operationalization of variables

Individual variables were operationalized and converted to a five-degree scale: 0 – 0.25 – 0.5 – 0.75 – 1.

Previous work with the target group

This variable expresses to what extent the implementer of a project worked with the target group before. The hypothesis was that the more successful a project was, the more intensive cooperation with the target group in the past. 0 meant that it was the first experience with the target group, 1 was long-term intensive cooperation.

Knowledge of the needs of the target group

This variable expresses to what extent the implementer examined the needs of the target group irrespective of how long they had worked with it. 0 meant that the implementer had built on assumptions, 1 a comprehensive and in-depth analysis of the needs of the target group.

Properly defined activities

This variable is an assessment of how strong was the causal link between the implemented activities and the anticipated goal of a project. 0 meant that there was no direct logic link between the activities and the anticipated result, 1 precisely and properly focused activity.

Adequately selected inputs

This variable reflected the configuration of individual inputs for the implementation of a project. 0 meant that the inputs had been inadequately configured (e.g. an underestimated budget or a wrong choice of experts), 1 exactly and properly configured inputs in terms of quality and quantity.

Self-implementation

This variable expresses which share of the activities of a project were implemented by the applicant / partner and which share by a third party contractor. 0 meant that the whole project had practically been carried out by a contractor, 1 almost 100% in-house implementation.

Knowledge of the demand for outputs

This variable expresses the implementer's prior knowledge of the demand for the results of a project. 0 meant that the implementer had practically failed to examine the interest of the target group (potential users), 1 was a situation where the implementer had precisely determined the interest in the utilization of the outputs of a project.

Ensured sustainability

This variable assessed to what extent the implementer had dealt with post-project sustainability of activities already during the preparation and subsequently in the implementation of a project. 0 meant that the implementer had not planned for sustainability at all or addressed it only very generally, 1 was a situation when project activities were aimed at specific sustainability measures designed beforehand.

fsQCA results

The following section presents the main fsQCA results. On initial examination, the truth table and the results of a subset/superset analysis give an overview of combinations of circumstances that have relatively high consistency for a result to occur. As already indicated in the context of the QCA for task 1, the height of the consistency threshold required for determining sufficient combinations of conditions always depends on the evaluator when working on the assessment. In general, the higher the degree of consistency, the higher the degree of explanation of the conditions or their combinations in evaluating the observed phenomenon.

As for this fsQCA, it is obvious that the overall consistency accounts for approximately 75.86%. It can legitimately be concluded that the observed phenomenon is affected also by other conditions and factors. It is very likely that these might include certain indicators related to the recipients themselves (legal form, size etc.) Nevertheless, the information value can be considered as sufficient for the purposes of this fsQCA and no other conditions were therefore added. The results of the QCA show that combinations of variables "self-implementation", "knowledge of the demand for outputs" and "ensured sustainability" are key conditions for the overall success of a project. It is clear that in order for a project to be successful, it is important that the project be largely self-implemented (as opposed to projects a significant part of which is delivered by an external contractor). Further, a real interest of the target group in the outputs of a project and whether the applicant actually ensured (not just declared) that a project would be sustainable appear to be important factors. A combination of these three conditions turns out to be significant for the overall success.

Table 2: Truth table

predchozi pra...	znalost potreb	spravne nasta...	spravne zvol...	realizace vlast	znalost popta...	zajistena udzri	number ▾	uspesnost pr...	raw consist.	PRI consist.	SYM consist
1	1	1	1	1	1	1	4 (36%)		0.875000	0.875000	0.875000
1	1	1	1	0	1	0	2 (54%)		0.758621	0.750000	0.750000
1	1	1	1	1	1	0	1 (63%)		0.631579	0.631579	0.631579
1	1	1	1	1	0	1	1 (72%)		0.769231	0.769231	0.769231
1	0	1	1	1	0	0	1 (81%)		0.285714	0.285714	0.285714
0	1	1	1	1	1	1	1 (90%)		0.700000	0.700000	0.700000
0	0	0	1	1	0	0	1 (100%)		0.166667	0.166667	0.166667
1	1	1	1	1	0	0	0 (100%)				
1	1	1	1	0	1	1	0 (100%)				
1	1	1	1	0	0	1	0 (100%)				
1	1	1	1	0	0	0	0 (100%)				
1	1	1	0	1	1	1	0 (100%)				
1	1	1	0	1	1	0	0 (100%)				
1	1	1	0	1	0	0	0 (100%)				
1	1	1	0	0	1	1	0 (100%)				
1	1	1	0	0	1	0	0 (100%)				
1	1	1	0	0	0	0	0 (100%)				
1	1	0	1	1	1	1	0 (100%)				
1	1	0	1	1	1	0	0 (100%)				
1	1	0	1	1	0	1	0 (100%)				
1	1	0	1	1	0	0	0 (100%)				
1	1	0	1	0	1	1	0 (100%)				
1	1	0	1	0	1	0	0 (100%)				
1	1	0	1	0	0	1	0 (100%)				
1	1	0	1	0	0	0	0 (100%)				
1	1	0	0	1	1	1	0 (100%)				

Zdroj: vlastní zpracování

EQ 2.3 WHAT POTENTIAL ADJUSTMENTS DO YOU SUGGEST TO THE METHODOLOGY FOR EVALUATING FACTUAL RESULTS OF SELECTED PROJECTS THAT WAS DEVELOPED WITHIN AOA 2011?

Methodology developed as part of AOA 2011 was used in accordance with the contract documents in the first phase of addressing Evaluation Task 2. The methodology was adjusted, by agreement with the client, already in the first round of the preparation of case studies, which involved the development of 9 case studies for the HREOP Annual Report; compared to AOA 2011, the methodology used in AOA 2012 focuses more on the evaluation of results than on the description of the implementation process of projects. Further, more emphasis is placed on evaluations provided by target groups through questionnaire surveys.

The structure of the case studies was modified as follows:

- Project identification data – in the form of an overview table (identical with AOA 2011)
- Introduction – brief information of the preparation of a CS
- Project assessment results – overall assessment, summary of main benefits and possible deficiencies
- Initial situation and goal of a project – conditions and reasons for the preparation and implementation of a project
- Key activities for result achievement – descriptive part (identical with AOA 2011)
- Lesson from the implementation – strong and weak points of a project (converted into an overview table in the second wave)
- Conclusion – summary of main benefits mostly from the evaluator's point of view
- Visualization of the theory of change (identical with AOA 2011)

In the second wave, the evaluator used cooperation with the Czech Social Security Administration (ČSSZ) for the assessment of some of the projects, with an aim to verify the status of the target groups on a particular date. In simple terms, this method was to determine how many people from the target groups were employed on that date and how many were not. The evaluator is convinced, on the basis of the evaluation made and the case studies carried out, that this was the most effective and accurate way of assessing the support effectiveness. Therefore, if any other case studies are prepared which have as their main focus the placement of persons in the labour market (primarily area of support 2.1), we recommend that the verification be conducted. This entails a prior agreement and the establishment of cooperation and communication conditions with the ČSSZ as well as a list of participants who were the subjects of a project. In AOA 2012, the evaluator encountered

reluctance or inability to provide the list in several cases, mostly due to the fear of violating certain laws. For more details refer to problem areas in Annex 3.

EQ 2.4 HOW DO YOU ASSESS THE RESULTS OF APPLYING A METHODOLOGY ADJUSTED ACCORDING TO THE OUTPUTS OBTAINED IN ADDRESSING EQ 2.2 IN COMPARISON WITH THE ORIGINAL METHODOLOGY DEVELOPED IN AOA 2011?

The adjustment of the methodology had effect in two areas – factual and formal.

The factual benefit is seen primarily in the above recommended verification of the support effectiveness through the ČSSZ database. Therefore, the work is not limited to a sample associated with the difficulty of choosing the sample, dealing with non-response bias or low response rate of a questionnaire survey.

Another factual benefit is an exact identification and specification of the strong and weak points of the project assessed to learn a lesson from the implementation.

The formal benefit consists in a more clear and practical structure of the preparation of case studies: the section “Project Assessment Results” is designed as a managerial summary of the whole study and can be used without any substantial modifications.

The formal benefit is seen also in an overview table of a project’s strong or weak points, telling the reader, in a comprehensible and structured form, what the fundamental reasons for the project’s success or failure were.

EQ 2.5 WHICH OF THE PROJECTS ASSESSED HAVE A POTENTIAL FOR FURTHER INVESTIGATION OF THEIR RESULTS IN A SUBSEQUENT EVALUATION?

The evaluator recommends considering further investigation / a second evaluation of the following projects:

CZ.1.04/2.1.01/44.00040 A step to employment, implemented by Síť mateřských center

In view of the relatively narrow focus of the requalification (Childminder) and the number of re-trained persons (237), it would be interesting to assess the success of this target group in finding a job in this field or in the labour market in general.

CZ.1.04/3.1.02/43.00071 A good job, implemented by Krok, o.s.

The project was unique with its comprehensive and intensive work with clients and the application of methods of working with clients that are quite unconventional for the HREOP. It would be interesting to know if this way of working with the at-risk group of abstaining addicts is successful in the long-term.

CZ.1.04/2.1.01/63.00014 Education and active support for job applicants and seekers in pharmaceutical and health care industries, implemented by Androsa s.r.o.

The project was targeted at a motivated target group of school graduates but its weak point was that it did not focus on practice but purely on educating this target group. It would be interesting to examine the results over a longer period of time and whether the target groups are employed in these fields.

CZ.1.04/3.2.01/19.00121 Field social work in a socially excluded Roma locality in Orlová – Poruba, implemented by the town of Orlová

The project was characterized by being highly needed and by focusing on a specific target group. An examination of the long-term success could be a real example of good practice.

4.3 Evaluation of Task 3: Assess the outputs and results of projects under Priority Axis 5, including an assessment of the effect of the implementation of innovation and partnership principles on these outputs and results.

The purpose of Evaluation Task 3 was to assess the outputs and results of projects under Priority Axis 5, including an assessment of the effect of the implementation of innovation and partnership principles on these outputs and results. This evaluation task included also an evaluation of the possible use of particular outputs/products/innovations, especially their possible application in mainstream (non-innovation) 2014+ ESF projects. In the surveys and analyses carried out, special emphasis was placed on the identification of interesting projects with a potential for further dissemination or detailing of the outputs and which could receive additional funds in the current programming period or be further elaborated in the subsequent programming period 2014 – 2020.

EQ 3.1: HOW DO YOU ASSESS OUTPUTS AND RESULTS ACHIEVED BY PROJECTS UNDER PRIORITY AXIS 5 AND, IN PARTICULAR, THE VALUE OF INNOVATIONS CREATED/ADAPTED TO THE CR/TESTED/IMPLEMENTED?

Methodological context and evaluation procedure

Methodologically, evaluation question 3.1 was based on evaluation procedures defined for the *Evaluation of the Fulfilment of the Innovation Principle in the HREOP*, i.e. a methodology for evaluating the level of innovation. However, this methodology was not entirely suitable, namely for the specific nature of HREOP international cooperation projects, and was therefore revised. Subsequently, in-depth desk research was carried out for PA5 projects² using MONIT7+ or outputs presented on projects' websites, and to each of the projects characteristic values were assigned. According to the revised methodology for evaluating the level of innovation, PA5 projects were evaluated in 12 characteristics: Targeting, Comprehensiveness, Novelty, Improvement, Process, TG Involvement, Partnership, Practice, Dissemination, Sustainability, Initiation, Evaluation. Specific emphasis was placed on "dissemination, sustainability and initiation" for which a questionnaire survey was also conducted. However, it should be noted that although the evaluation in the database (Excel) covers all PA5 projects, it was performed as a desk evaluation due to the methodology used, and is merely indicative. For this reason, partial conclusions from evaluation task 3.1 were verified in other evaluation questions by the triangulation of the evaluation methods (e.g. cooperation with the ČSSZ, questionnaire surveys, micro-studies, expert interviews).

² PA5 projects with statuses implemented (status P45), finished (status P5), project funding expired (P6), project expenditure certified (P7) and project definitely closed (P8).

Findings and conclusions

In the table below there is a summary of average scores of PA5 projects for characteristics monitored.

Table: Average scores in individual criteria by clusters of target groups

Klastr cílové skupiny	Cílenost	Novost a zlepšení	Zapojení CS	Různorodost a partnerství	Praxe a šíření	Formy šíření	Upscaling a udržitelnost	Iniciace	Evaluace	Celkový průměr	Počet projektů
Sociální podnikání	0,60	1,00	0,40	0,80	0,80	0,70	2,30	1,30	0,40	8,30	10
Etnické menšiny/Romové/Sociálně vyloučené lokality	1,30	1,00	0,70	0,60	0,60	0,30	1,60	1,10	0,70	7,90	10
Osoby s mentálním postižením/duševním onemocněním/Dlouhodobě nezaměstnaní	1,36	1,07	0,71	0,29	0,57	0,36	1,36	1,00	0,71	7,43	14
50+	1,24	0,58	0,58	0,68	0,37	0,21	1,84	0,89	0,58	6,97	19
Osoby závislé na návykových látkách/hazardu	1,13	0,75	0,75	1,00	0,25	0,00	2,75	0,25	0,00	6,88	4
Náhradní rodinná péče/Pěstouni/Adopce	1,25	0,50	0,33	0,17	0,67	0,17	1,83	1,00	0,67	6,58	6
Sladění rodinného a pracovního života/Ženy na trhu práce	1,21	0,64	0,48	0,76	0,45	0,39	1,18	0,88	0,58	6,58	33
Osoby se zdravotním postižením/Dlouhodobá péče	1,09	0,59	0,59	0,69	0,62	0,38	1,45	0,59	0,48	6,47	29
Rozvoj soukromého podnikání u znevýhodněných osob na trhu	0,75	0,50	0,40	0,33	0,50	0,17	2,33	0,67	0,67	6,25	6
Uchazeči o zaměstnání/Dlouhodobě nezaměstnaní/Absolventi	1,00	0,50	0,35	1,08	0,46	0,27	1,50	0,65	0,42	6,23	26
Venkov (vzdělávání, vstup na trh práce, podnikání atd.)	0,57	0,71	0,57	0,14	0,57	0,43	1,57	0,86	0,71	6,14	7
Posilování kapacit samosprávných celků	0,79	0,14	0,57	0,86	0,29	0,43	1,57	0,71	0,57	5,93	7
Mladí lidé s nízkým vzděláním/bez vzdělání	1,25	0,75	1,00	0,00	0,50	0,25	0,75	0,75	0,25	5,50	4
Posilování kapacit NNO	1,15	0,50	0,30	0,30	0,30	0,30	1,30	0,80	0,40	5,35	10
Imigranti a azylanti	1,09	0,45	0,45	0,45	0,27	0,27	1,55	0,36	0,18	5,09	11
Úřady práce/Koncepce zaměstnanosti/Inovace/Methodiky pro	0,64	0,45	0,00	0,55	0,36	0,09	1,09	0,82	0,55	4,55	11
Místní partnerství	0,61	0,33	0,11	1,00	0,11	0,11	1,33	0,89	0,00	4,50	9
Oběti domácího násilí/Krizové životní situace (Výkon trestu/B	0,82	0,29	0,07	0,29	0,36	0,21	1,21	0,57	0,43	4,25	14

Legenda:
 klastry s nejvyšším bodovým hodnocením
 klastry s nejnižším bodovým hodnocením

Pozn.: Bodové hodnocené charakteristiky jsou na škále 0 - 2, charakteristika upscaling a udržitelnost je na škále 0 - 4

Source: IREAS

From the observed **clusters of projects** by target groups, **the best overall results** were achieved by projects directed at:

- **social business** – these projects received extraordinarily high scores for novelty and improvement, practice and dissemination, forms of dissemination, upscaling and sustainability and initiation of further development of innovation introduced. This cluster of projects scored poorly in the evaluation of the targeting of projects carried out, since the projects lacked any clear argument for the dissatisfactory solution to the current situation in the project application, and the descriptions of the potential benefits of the proposed innovation for the target groups were shallow as well;
- **ethnic minorities/Roma/socially excluded localities** – these projects have the second best ranking and received extraordinarily high scores for project targeting, novelty and improvement, possibilities of initiating further dissemination of innovation. They achieved relatively high scores also for “evaluation”, i.e. these projects appropriately provide feedback and evaluation of achievements;
- **people with mental disorders/illnesses** – these projects have the third best overall ranking and received extraordinary scores for project targeting, novelty and improvement of problems addressed.

On the contrary, **the lowest scores** were achieved by clusters of projects directed at:

- **local partnerships** – these projects received very good scores for diversity and partnership because in most cases they involve a broad spectrum of various partners. However, they scored very poorly in project targeting, novelty and improvement, TG involvement, practice and dissemination and forms of (ex-post) evaluation;
- **victims of domestic violence / life crisis situations** – these projects received only average and below-average scores. The very minimum contribution of these projects can be identified in terms of their novelty and improvement and involvement of representatives of target groups to which the projects outputs relate only indirectly and to a rather limited extent;
- **employment agencies / employment concepts** – these projects received very poor scores for targeting, involvement of representatives of target groups and, in a very limited extent, dissemination concepts.

Ten potentially suitable projects were recommended in terms of mainstreaming the results in the 2010 HREOP Annual Operational Assessment. In this evaluation paper, the recommendation was verified according to the scores of individual projects. The 2010 AOA recommendation is valid for 8 projects identified; however, the 2 projects below received very low scores and the recommendation is therefore no longer relevant:

- CZ.1.04/5.1.01/12.00125 – Bory – the project itself does not bring any essential improvement in terms of new instruments for the support of local partnerships. It is not clear (according to the final monitoring report or Bory's website) even after the end of the project implementation what specific forms and results have actually been achieved by the project;
- CZ.1.04/5.1.01/51.00047 – Česká unie pro podporované zaměstnávání, o.s. – the main project's objective was the sharing of experience, examples of good practice and best practice examples of EP in the CR in the form of a thematic network. After completion, it is not clear what results have actually been achieved by the project, there is no ex-post evaluation or possibility to assess the impact of the project on the labour market in relation to the target group concerned.

EQ 3.3: WHAT IS THE EFFECT OF THE IMPLEMENTATION OF INNOVATION AND PARTNERSHIP PRINCIPLES ON RESULTS AND OUTPUTS OF PROJECTS UNDER AXIS 5?

Methodological context and evaluation procedure

The process of dealing with evaluation question 3.3 was methodologically divided by the evaluator into 2 sub-questions because a parallel evaluation of the effects of innovation and

partnership is difficult to carry out. Therefore, 2 sub-questions were formulated and evaluated in already finished projects (status P5):

- **EQ 3.3 a) Effect of the implementation of the innovation principle on outputs and results achieved**

The effect of the implementation of the innovation principle on outputs and results achieved in PA5 projects is examined in this evaluation sub-question in two groups, i.e. (1) **Innovation projects** where created innovations were tested through various **pilot training courses** for selected target groups and the effect of innovation on outputs and results was verified by determining the situation of supported persons in the labour market in cooperation with the ČSSZ; (2) **Process innovation projects** focused on cooperation with NGOs or transfer of specific experience without direct impact on some of the target groups. In this project group, individual projects were assessed using MONIT7+.

- **EQ 3.3 b) Effect of the implementation of the partnership principle on outputs and results achieved**

In this evaluation sub-question, the effect of partnerships was evaluated in terms of the phases of a project, i.e. the role of partnerships at the time of (A) preparing project proposals, (B) implementing projects, (C) after the termination of projects. The evaluation was based on the result of **answering evaluation question 3.1** (specific individual characteristics of partnership). **The role of partnerships at the time of preparing project proposals was reviewed through a questionnaire survey for clusters of projects.**

Findings and conclusions of EQ 3.3 a)

As for **innovation projects**, the research team checked with the external administrator the availability of participants lists for 10 projects identified that focused at least partially on the labour market and pilot training courses. It was found that course attendants' date of birth was stated in addition to the name and surname in the participants lists by a single project. It was CZ.1.04/5.1.01/51.00037 directed at social business. Other projects did not keep records of representatives of target groups (supported persons) in a form enabling them to trace and analyse these people. The situation of supported persons in the labour market as at 31 December 2012 was verified in cooperation with the central office of the ČSSZ. The success of supported persons in the innovation project under PA5 was extraordinarily high and achieved 62.72% seven months after the end of the project implementation. A similar

project that was tested within area of support 3.3³ in 2012 achieved only 27.27%. Therefore, it can be concluded that **the effect of the implementation of the innovation principle** on outputs and results achieved by projects **concerned with social business is significantly higher than in other mainstream projects** in comparable areas of support of the HREOP. The focus of the other 9 projects directed at the testing of created innovations through various pilot training courses was examined in MONIT7+. Out of the 9 finished projects under evaluation, there were only two with a little effect of innovation on results achieved. The little effect of innovation on results achieved was connected with the focus of the projects, i.e. development of a methodology, handbook or website or ad-hoc one-off activity with no wide applicability of the projects outputs.

In the case of **process innovation projects under PA5**, the highest effect of innovation was identifiable in projects focused on social business, people with mental disorders and ethnic minorities. For applicants for process innovation projects it will be necessary to submit a system for the evaluation of the activity by the supported persons who apply the new processes (e.g. employment agency staff members). The applicants should also undertake to carry out an ex-post evaluation 6 to 12 months after the end of the implementation of the projects (questions focused on how the staff members utilized the knowledge obtained in the training courses or workshops in their normal working agendas). In current PA5 projects focused on methodological processes or development of systemic legislative recommendations, it should be possible to subsidise specific applications of such processes in practice.

Findings and conclusions of EQ 3.3 b)

When evaluating **the role of partnerships** (based on MONIT7+ data and relevant projects' websites) **at the time of preparing project proposals**, it was found that the final recipients did not mention, in any way, the formation of partnerships in approximately 2/3 of projects. In a questionnaire survey⁴, 79% of the respondents stated that they had had long-term experience with the partners. This represents a supporting base for the further mainstreaming of outputs and results achieved. **The role of partnerships at the time of implementing projects** was different for international partners who were involved, in most cases (about 50-60%) across all project clusters, in the form of innovation transfers without

³ The target group of *area of support 3.3 Integration of socially excluded groups in the labour market* is long-term excluded persons from the labour market, in particular, people of up to 25 years of age with no or low qualifications, older people (over 50), members of minorities, disabled people, migrants and people granted asylum. The target groups of "post-social integration" persons primarily include people taking care of dependants, people who had served a sentence in prison, people of up to 26 years of age growing up without families and drug addicts.

⁴The questionnaire survey results are merely indicative because only 19 respondents out of the total of 170 contacted final recipients participated, i.e. approximately 11% response rate.

any adaptation to the Czech conditions. The role of their Czech partners was therefore reduced to the verification of the possibility to apply the innovations in the Czech conditions. It should be added that domestic partners were not at all involved in 2/3 of PA5 projects. **The role of partnerships after the end of the projects** was evaluated not only in project applications but also on the basis of available websites of finished projects (P5, P6, P7). Overall, the ex-post involvement of partners was somehow described in about 40% of all PA5 projects. The remaining 60% of projects did not specify the continuation of partnerships after the end of the projects at all.

The effect of the implementation of the partnership principle on outputs and results achieved in PA5 projects is usually best identifiable in cases where **projects are directed at specific forms of innovations and their testing/verification on the relevant representatives of the target groups in the Czech practice**. On the basis of the desk-research of implemented PA5 projects, it is possible to define an axiom, i.e. “specific” results of international cooperation projects create conditions for “specific” forms of follow-up cooperation. In international cooperation projects where the activity has a more general focus (e.g. seminars, workshops, internships, conferences), the final recipients usually incline to general and vague formulations in relation to the further potential for cooperation development.

EQ 3.2: WHAT ARE THE OPPORTUNITIES FOR THE EXPLOITATION OF SPECIFIC OUTPUTS/PRODUCTS/INNOVATIONS OF PROJECTS UNDER AXIS 5, ESPECIALLY THEIR POSSIBLE APPLICATION IN MAINSTREAM (NON-INNOVATION) 2014+ ESF PROJECTS?

Methodological context and evaluation procedure

A more in-depth qualitative analysis was carried out through case micro-studies. The evaluator focused on projects that received the highest scores (i.e. more than 12 points) in evaluation question 3.1 and were identified as important in evaluation question 3.3. The findings of the micro-studies were further verified, by thematic areas (or focus of the types of innovation on the types of target groups), in controlled interviews with selected experts on the particular types of areas. For projects that were not identified as “best” (on the basis of answering questions 3.1 and 3.2), an overview of their main outputs/results was prepared together with a brief justification of why these projects are not suitable for mainstreaming in 2014+. The opportunities for the application of these outputs in ESF mainstream projects in the subsequent programming period were assessed in the form of an expert evaluation.

Findings and conclusions

Fifteen projects were selected for micro-studies, with 4 of them recommended also in a special category in which innovation and partnership were evaluated.

Table: List of highest ranked projects selected for micro-studies

No.	Registration number	Final recipient (cluster of projects)	Chapter	Total score
1	CZ.1.04/5.1.01/77.00385	Centrum pro rozvoj péče o duševní zdraví (<i>mentally disabled people</i>)	7	14
2	CZ.1.04/5.1.01/77.00165	Educa International, o.p.s. (<i>job applicants</i>)	4	13.5
3	CZ.1.04/5.1.01/77.00091	Centrum pro rodinu a sociální péči (50+)	9	13.5
4	CZ.1.04/5.1.01/12.00096	IQ Roma servis, o.s. (<i>ethnic minorities</i>)	10	13
5	CZ.1.04/5.1.01/77.00006	Člověk v tísni, o.p.s. (<i>ethnic minorities</i>)	10	13
6	CZ.1.04/5.1.01/51.00037	Renarkon, o. p. s. (<i>social business</i>)	3	12.5
7	CZ.1.04/5.1.01/12.00018	KAZUIST, spol. s r.o. (<i>physically disabled people</i>)	1	12
8	CZ.1.04/5.1.01/51.00067	MĚSTSKÁ ČÁST PRAHA - LIBUŠ (<i>immigrants and people granted asylum</i>)	8	12
9	CZ.1.04/5.1.01/77.00445	Evropský institut pro smír, mediaci a rozhodčí řízení, o.p.s. (ESI, o.p.s.) (<i>job applicants</i>)	4	11.5
10	CZ.1.04/5.1.01/77.00438	STATUTÁRNÍ MĚSTO DĚČÍN (<i>improvement of the capacities of local self-governing units</i>)	12	11.5
11	CZ.1.04/5.1.01/77.00268	Nadační fond J&T (<i>foster care</i>)	15	11.5
12	CZ.1.04/5.1.01/12.00069	Centrum vizualizace a interaktivity vzdělávání, s.r.o. (<i>physically disabled people</i>)	1	11
13	CZ.1.04/5.1.01/77.00382	Novohradská občanská společnost o.s. (<i>social business</i>)	3	11
14	CZ.1.04/5.1.01/77.00464	Farní charita Starý Knín (<i>improvement of the capacities of NGOs</i>)	6	11
15	CZ.1.04/5.1.01/77.00343	Liga otevřených mužů, o.s. (<i>harmonization of family and professional life</i>)	14	11

Complete micro-studies can be found in the Annex to the Final Report, whereas each of them has approximately 1 to 2 pages and contains a more detailed qualitative assessment as to the advisability of the mainstreaming of the relevant outputs in 2014+. The best projects selected for micro-studies included:

- 1) 3 clusters of projects that received the best scores in evaluation question 3.1, i.e. social business, ethnic minorities/Roma/socially excluded localities, people with mental disorders/illnesses;
- 2) Other unique projects with high scores in clusters: job applicants, 50+; improvement of the capacities of local self-governing units, improvement of the capacities of NGOs; harmonization of family and professional life.

The focus and experience to date of the final recipients is of major importance for the anticipated success of the outputs and results of international cooperation projects. Where the entities have been active in working with representatives of target groups in the long-term, the potential for the increased use and relevance of international cooperation projects is stronger.

For this reason, the “best” PA5 projects identified have great potential for mainstreaming in the subsequent programming period 2014 – 2020, especially in relation to the promotion and support of the dissemination of tested innovations and new processes in other parts of the CR in territorial terms (i.e. other regions) and, further, with respect to the users or institutional stakeholders (e.g. diffusion of innovations to other target groups or entities capable to influence the labour market – employers, NGOs, associations).

Conclusion of Micro-Study 1: Involvement of peer consultants in the care for the mentally ill – mentally disabled people

The project aims at involving workers who have experienced a mental disorder – “peer consultants” (hereinafter referred to as the “PC”) – in the system of care for the mentally ill to promote employment of the mentally ill and to improve the healthcare system itself. Further, the project will introduce the PCs and attract the interest of mental healthcare providers in involving the PCs in their work teams.

The project carried out is well-developed and very suitable for mainstreaming in the CR, in particular with regard to the commitment to systematically educate and employ the mentally ill as lay therapists, followed by systematic work with the employers (including NGOs) and future co-operators of the peer consultants (the team).

Conclusion of Micro-Study 2: Second chance school – job applicants

The project aims at transferring foreign experience in the vocational training of young people who did not gain the necessary qualification at school after they had completed elementary education and their employment in the labour market is therefore very difficult. In the Czech Republic, there is no institution dealing with “second chance school” issues. The model used in EU countries has not been introduced in the CR so far. If the project is successful when implemented in 2015, its results will be suitable for mainstreaming in main ESF programmes and diffusion of this innovation beyond the Central Bohemian Region.

Conclusion of Micro-Study 3: Trefoil - 50+

This project focuses on the lack of places in pre-school facilities and facilitates contact between families with children of up to 15 years of age and foster grandmothers by pilot testing the service. Applying experience from abroad to the Czech environment is key. After the successful implementation of the project and the achievement of planned outputs and results, their mainstreaming in other Czech Regions should be promoted.

Conclusion of Micro-Study 4: Together and Across – ethnic minorities

The main goal of the project was to strengthen the exchange of experience and good practice examples between EU countries in relation to work with socially excluded Roma communities. The project's international partnership focused on facilitating an inflow of information of European trends in social integration of excluded minorities, verifying the national experience by viewing it through the foreign perspective, and inspiring others to adopt an alternative approach to raising the educational achievement and employment of the Roma and enabling the Roma as people at risk of social exclusion to take a fresh look at their life situation and motivating them to action using foreign experience.

The approach of the final recipient can be used for mainstreaming at the national level in 2014+, in particular with respect to supporting the promoted concept of the *Ethnic Friendly Employer* brand by increasing the employers' and associations' awareness of the product applicability.

Conclusion of Micro-Study 5: Inspiration: Sachsen – ethnic minorities

The goal of local partnerships will be to ensure the creation of an effective system of work with children, youth and young adults in terms of their integration in the legal labour market using the experience from Sachsen.

The project is unique in its focus on addressing specific local needs and related issues. This in particular concerns work with ethnic minority youth in Sachsen and Ústí nad Labem and Karlovy Vary Regions for whom solutions will be formulated regarding work with the TG in the specific environment of the Bohemian part of Krušnohoří. There is a similar situation in other parts of the CR and the anticipated outputs of the project will therefore have broader applicability for other Regions.

Conclusion of Micro-Study 6: Social firm – utilization of the Swedish model in the conditions of the Moravian-Silesian Region

The main goal of the project is to support employment and increase the employability of disadvantaged persons in the labour market using the Swedish concept of social firm with a special emphasis on specific target groups (TGs) of people with addictions or people who had served a sentence in prison.

The project carried out very well-designed activities that reflected the needs in practice and reacted to the absence of adequate mechanisms in the CR for addressing the issues of the relevant representatives of the target groups. The project outputs have been applied exclusively in the Moravian-Silesian Region and the results are therefore suitable for mainstream activities under the ESF 2014+.

Conclusion of Micro-Study 7: ATHENA on the road – physically disabled people

The project aimed at promoting the development of human resources in barrier-free travel, mainly by developing the capacities and awareness of public and private actors at local and regional levels through the spread of foreign experience and good practice, and helping improve the policies and strategies in that field on the basis of the feedback received within the context of international cooperation.

Since the results of the project were only disseminated in 4 Czech Regions, the project can be considered as having potential for other Czech Regions in 2014+ as well as for dissemination of outputs and utilization by other target groups, i.e. impact on social service providers, educational institutions, employers, employment service institutions etc.

Conclusion of Micro-Study 8: Building on the experience of international partners to address issues related to the integration of foreigners from Praha - Libuš in the labour market – immigrants and people granted asylum

The main objective focuses on the use of international cooperation to address issues related to the occupational integration of foreigners from the district in question. The key innovation is the development and introduction of an entirely new educational programme for foreigners in this district of the Capital City of Prague. It can be expected, with respect to the methodological context required for developing relevant training programmes, that they will be applicable also to other national immigrants or completely different target groups.

Conclusion of Micro-Study 9: Mediation Law (Act No. 202/2012 Sb.) from a labour market perspective – a new chance – job applicants

The main objective of the project is to increase the employability of target group members using the opportunities opened by the new Mediation Law (Act No. 202/2012 Sb.); with the assistance of international partners, to create a methodology for community workers and to help implement the Law in the Czech environment. This implementation will lead to the need for new and – in relation to already existing mediators – auxiliary jobs that will satisfy the demand by the public.

The outputs will be applicable in mainstream activities under the ESF 2014+, particularly by raising awareness of the possibilities and advantages of mediation as an option for alternative dispute resolution through local self-governing units.

Conclusion of Micro-Study 10: To more attractive Děčín and its surrounding region by supporting the labour market – improvement of the capacities of local self-governing units

The main objective of the project is the promotion of employment in Děčín and its surrounding region by creating an effective support strategy for and small and medium-sized businesses. The specific goals of the project are: transfer of project partners' experience and know-how from abroad, establishment of a functioning local partnership based on effective

communication of the town with employers and other labour market actors, development of innovative instrument “Let’s Deal With It Together” and a business incubator.

The output of the project has great potential to be further disseminated in the CR in order to address unemployment at the micro-regional level. The project will produce instrument *Let’s Deal With It Together* directed at developing local partnerships by improving communication of the town with small and medium-sized businesses/employers. The project results will be easily verifiable in practice in the form of the development of overall unemployment rate in a micro-region and the situation in particular businesses involved.

Conclusion of Micro-Study 11: How to actively find foster parents – process professionalization in selecting candidates for the new type of employment – foster care

The main objective of the project is to spread the knowledge possessed by the key actors in the labour market of international practice in selecting candidates for the new type of professional foster care jobs.

The project focuses on “process innovation”, specifically on identifying effective organizational practices for foster parents recruitment. This is a completely new thing in the CR; therefore, it is a question of transferring relevant experience abroad and verifying it in the Czech conditions. It can be expected, with respect to the nature of the planned output of the process innovation, that the potential for the further mainstreaming of these patterns will be desirable for the broader social policy of the CR.

Conclusion of Micro-Study 12: Exchange of experience and transfer of good practice in dealing with social integration of the physically disabled in the labour market or Increasing employment of physically disabled people using Diversity Management with a focus on the application of Diversity ScoreCards

The project aims at implementing Diversity Management in the Czech labour market. The project’s final target group is people with physical disabilities because the application of the Diversity Management principles will help improve their position in the labour market.

The project has a high degree of initiation and potential for further dissemination of the outputs in the CR, in particular by involving a broad spectrum of social partners (their organizations and employees), employers and educational institutions. Involvement of university students in management and economics fields also seems to be adequate in view of ensuring long-term sustainability and of the gradually changing ordinary people’s attitudes.

Conclusion of Micro-Study 13: Family and work – rural innovation – social business

The main objective of the project is to use the experience and methods of an international partner in social business and to develop them in the Sdružení Růže territory (LAG) and to spread them in the South Bohemian Region and in the whole CR.

Territorial reflection of rural areas through social business represents significant potential for employment stabilization in the countryside. Most probably, the results of the project will be suitable for mainstreaming in other Czech Regions or rural areas of relevant Regions (specifically for the representatives of Regions, LAGs, Micro-Regions).

Conclusion of Micro-Study 14: In control of your professional fate – improvement of the capacities of NGOs

The project focuses on 4 sub-targets, i.e. (1) formation, development and operation of a thematic network (exchange of experience, common formulation of attitudes, awareness of the value of one's work, finding ways to "defend" it), (2) identification, analysis and assessment of national and international good practice; (3) development of a compendium of good practice and recommendations for changing policies; (4) dissemination of the outputs among the public and relevant key actors.

The project is specific with the relatively narrow target group (women in the labour market); nevertheless, its results should be of sufficient quality and desirable, in particular with regard to their possible incorporation in human resources development policies in 2014+.

Conclusion of Micro-Study 15: Daddies Welcome – harmonization of family and professional life

The purpose of the project is to enhance the prestige and competences of men in the role of primary child carers; the essential objective is the introduction of the "Daddies Welcome" brand as an innovative product. This brand will be granted to employers and organizations promoting active fatherhood in their personnel strategies and policies.

The project outputs will be applicable to harmonization of family and professional life, in particular with respect to the extensibility of the project to employers. It will be possible to mainstream the tested tools used to certify and support organizations in the wider context of the CR by involving a broader range of employers and, where appropriate, associations.

Although the evaluator gave bonus points to projects that impacted more than 1 Czech Region when revising the innovation assessment methodology, **7 projects turned out to have impacted a single Region** in the end of the evaluation. This is due to the final recipients pursuing the verification and testing of specific products in their locality. Activities of final recipients with long-term experience in a certain field and cooperation with representatives of target groups usually have a micro-regional to regional dimension. The micro-studies also showed that **the focus and experience to date of the final recipients is of major importance** for the anticipated success of the outputs and results of international cooperation projects. Where the entities have been active in working with representatives of target groups in the long-term, the potential for the use of the projects' outputs in practice is stronger.

On the contrary, **the worst results** were achieved by clusters of projects focused on **local partnerships, victims of domestic violence / life crisis situations and employment agencies / employment concepts**. These project groups received only average and below-average scores in the assessment. The very minimum contribution of these projects can be identified in terms of their novelty and improvement and involvement of representatives of target groups which were affected by the projects' outputs only indirectly and to a rather limited extent. Projects directed at employment agencies and related concepts received very low scores in terms of their targeting, involvement of representatives of target groups and, to a very limited extent, dissemination concepts.

Below is an overview of projects that received the lowest scores (on the basis of addressing questions 3.1 and 3.3), including their major outputs/results and a brief justification of why these projects are not suitable for mainstreaming in 2014+.

Project number and organization	Score	Major outputs and reasons why the projects are not suitable for mainstreaming
CZ.1.04/5.1.01/77.00203 Národní rada osob se zdravotním postižením České republiky <i>(physically disabled people)</i>	1	The output of the project is an analysis of the possibilities for removing discrimination against physically disabled people in the labour market using the experience from Sweden and other EU countries. Although the project is needed, it is very weak in its concept in terms of international cooperation and comprehensiveness of the approach.
CZ.1.04/5.1.01/12.00115 Centrum pro rozvoj péče o duševní zdraví <i>(improvement of the capacities of NGOs)</i>	1	The output of the project was internships abroad for about 40 experts, a methodological internship manual and a compendium of lectures on healthcare systems abroad and in the CR. The main reason why the outputs are not suitable for mainstreaming is wrong targeting, lack of opportunity to use and apply these outputs in social policy practice of the CR. The project activities do not include a feedback and an assessment of the effectiveness or the impact on activities supported.
CZ.1.04/5.1.01/77.00336 Klub personalistů Moravskoslezského kraje, o. s. <i>(immigrants and people granted asylum)</i>	0,5	The project outputs are/will be in the form of 5-day training courses on the proper use and application of an employer's handbook within the integration of foreigners in the labour market in the CR. The project fails to clearly define the innovation derived from experience abroad, to appropriately explain the need for the specific product (training) in Czech practice, although the integration of foreigners in the labour market is generally needed. The forms of diffusion and initiation of other activities have very general formulations.
CZ.1.04/5.1.01/77.00315 DAMACO Group s.r.o. <i>(harmonization of family and professional life)</i>	1	The project outputs are mainly represented by a secondary analysis of actions and employment opportunities for parents with children in the CR, results of a questionnaire survey on the existing opportunities and actions promoting employment of parents with children, a study exploring the opportunities to promote employment of parents with children in the CR, a pilot-tested methodology for implementing specific actions and possibilities for promoting employment of parents with children, an information brochure, a conference collection, an E-learning course with the project outputs. The project lacks clarity in the added value and the precise definition of the innovative product for the needs of the CR, only vague formulations taken almost wholly from the HREOP programming document.

<p>CZ.1.04/5.1.01/77.00402 In IUSTITIA, o.s. <i>(victims of domestic violence)</i></p>	1	<p>The project focuses in its outputs on the transfer of international knowledge and experience in direct assistance and prevention of sexual violence by presenting good practice abroad and transferring newly acquired knowledge to the environment of the CR. This project, too, is needed in the general terms of the programming documentation; nevertheless, the set-up of the project itself is very unclear, there is no specification of the main objective, connection with experience to date etc.</p>
<p>CZ.1.04/5.1.01/77.00426 Centrum sociálních služeb Praha <i>(victims of domestic violence)</i></p>	1	<p>The project focuses on an important area, i.e. experience and knowledge relating to assistance to victims of domestic violence. However, the project does not clearly define specific products or innovations that should be transferred to the Czech environment. On the other hand, the project is strongly directed at mainstreaming activities although it is not clear what concrete instruments will be addressed and, if appropriate, applied in the environment of the CR. Four internships abroad, an international conference, 4 workshops and 4 expert seminars will have taken place under the project by the end of 2014.</p>
<p>CZ.1.04/5.1.01/51.00105 Národní vzdělávací fond, o.p.s. <i>(employment agencies, concepts)</i></p>	0,5	<p>The project is focused on exchanging experience possessed by public employment service entities in development and implementation of employment policies and fields of activity of their bodies. However, there is no description of specific experience abroad (good or bad practice) or of the adequate need in the Czech conditions. Five international seminars on the identified themes took place and the Internet platform ProEmployment was created as part of the project. The contribution of the key project outputs, i.e. seminar collections, conference, evaluation report, website (http://www.proemployment.eu/), will be rather limited in practice. The project lacks clear targeting and specific means of application in social policy practice and environment of the CR.</p>
<p>CZ.1.04/5.1.01/77.00070 Národní vzdělávací fond, o.p.s. <i>(employment agencies, concepts)</i></p>	0,5	<p>The output of the project is the development of a national thematic network and its connection to a network for the international exchange of experience in providing Balance Diagnostics in employment services; the network will be translated into the innovation of methods and practices of working with clients to achieve a level comparable to the practices of EU countries in line with the objectives of Europe 2020. Such a project would be applicable to the environment of the CR on condition of higher involvement of relevant representatives in the CR. It is not clear from the project set-up what real innovation it is aimed at or whether the delivery of the innovation is actually pursued and how it would be applied in Czech practice.</p>

5 RECOMMENDATIONS

Recommendations for the improvement of the Programme's functioning are an important output of the evaluation. This chapter summarizes the most significant recommendations identified by the research team.

5.1 Recommendations resulting from case studies carried out

The research team formulated, on the basis of the assessment of projects and the preparation of case studies, the following recommendations that will help improve the implementation process of projects and the efficiency of the assistance or monitoring and evaluation of the contribution of individual projects.

Recommendation 2.1 – Specify, in terms of methodology, the ways of assessing applications in order to eliminate inappropriately focused activities.

Cases involving the implementation of activities that will not realistically result in the achievement of the projects' objectives or in the fulfilment of the needs of target groups, should primarily be eliminated in the application assessment process. It is already specified in the instructions for applicants what information should be provided in the description of the key activities. In reality, the quality and content of information given by applicants vary greatly.

Therefore, we recommend that a particular focus be placed on the application assessment process where these activities should be identified. For example, the evaluators should award full scores only when it is stated in the description of the key activities in a clear and substantiated manner:

- Which of the needs of the target group does the activity react to?
- How exactly will activity satisfy the need (what will be the benefits for the TG)?
- How will the implementation of the activity fulfil the project objective?

This public recommendation for the evaluators that could, for instance, be included in individual calls, might urge the applicants to think about the link between the needs and the proposed activities. This "indirect" appeal on both the evaluators and the applicants is suggested because we do not find it appropriate to integrate these questions directly in the project application form.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 4.

Recommendation 2.2 – In the event that a product is developed for a certain target group / user, require evidence of cooperation with the target group and their real interest in the product.

In the case of projects whose result is a product that should be used by other users, it would be appropriate to know the users' opinion already in the phase of establishing the need. This should not be reduced to the mere "I am interested" – "I am not interested" response but take the form of identifying the actual wish to use it. Ideally, the interest survey should, for instance, include the following information obtained from the potential users:

- What will I use the product for?
- What should the product output look like (e.g. what should the configuration of the model look like in order for me to fully exploit it)?
- What functionalities should the system / product have?
- Etc.

Such an interest analysis that would be based on the real participation of the final users (customers) increases the probability of the subsequent use of the project output. We recommend that it be considered as annex to project applications whose output will be a product for third party users.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 20.

Recommendation 2.3 – Implementation of on-going project evaluations and revisions, in particular for large-scale individual projects where it is justified

If any similar large-scale projects are carried out and major changes occur during their implementation that negatively affect the success of the projects, a mid-term (or on-going) evaluation should be conducted for both programmes and projects. The purpose of it would be an adjustment of the objectives and, where relevant, of the time for implementation to enable the projects to consequently achieve the main aim of support in public administration. As a last resort, such projects should be cancelled in cases where the external evaluator considers it inappropriate for these projects to continue.

Putting more emphasis on project risk analysis when preparing the future system for assessing project applications.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 14.

Recommendation 2.4 – Start a discussion and clarify the interpretation of public support in order to maximize the benefits of the support.

To deal with this situation, it is possible to point out the problem and start an expert discussion or prepare a legal analysis together with a proposal on how to deal with the situation. According to the information of the MLSA, the resolution process should be initiated by Section 4. It is more realistic to change national legislation than European-wide legislation concerning the ban on public support, associated with many exemptions thanks to which the otherwise prohibited subsidies to the private sector can exist.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 6.

Recommendation 2.5 – Adjustment of the administration of the receipt and assessment of applications in order to make the process more effective and strengthen the focus on results.

For the preparation of procedures for the submission, assessment and administration of projects in the subsequent programming period, we recommend:

- explore the possibilities to simplify the submission and approval of project applications for individual projects.
- explore the possibility to completely leave out the project-based approach in cases where the subsidy is used to secure normal operations of an institution.

However, in connection with this simplification or complete elimination of the preparation, approval and administration phases of a project, it is essential to strengthen the retrospective evaluation of the implementation of such projects, in particular with respect to the achievement of outputs and results. This can be ensured, for example, by an external on-going or ex-post evaluation of projects. Generally, the increased emphasis on the actual results rather than on the formal elements might significantly contribute to the increased quality of projects' outputs.

The evaluator therefore recommends focusing primarily on:

- Ex-ante evaluation of project proposals for grant projects where the best ones need to be chosen in the competition of projects, and
- Ex-post evaluation of projects' results for individual projects where the ex-ante evaluation was more of a counter-productive nature.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 8.

Recommendation 2.6 – Require keeping of clear and precisely defined records of target groups in the subsequent programming period.

In order to provide for the good quality of the evaluation and identify the actual contribution of projects, it is necessary to introduce an obligation for the recipients to keep and deliver, automatically or upon request, information of the target groups which participated in the projects, to the subsidy provider, ideally in the structure as follows:

- Name and surname
- Date of birth
- Contact address
- Telephone
- Email

Along with that the obligation to deliver this information to assess the contribution of projects should be legally imposed and communicated to the recipients. The issues related to the law on the protection of personal data could be dealt with, for instance, in the form of a request for written consent of project participants to the processing of personal data for the needs of the subsidy provider to assess the support.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 16.

Recommendation 2.7 – Adjustment and unification of the status and rules for corporate child care facilities.

A draft law on child groups is currently being prepared and discussed and should deal with these problem areas. For the drafting of the law and related discussion, we recommend using the observations from the case studies to treat these issues in this law in the context of the interpretation and application of the commercial law, education law and tax laws and, if applicable, any other laws related to the corporate child care facilities.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 18.

Recommendation 2.8 – Introduction of effective control mechanisms for timely detection of problem projects

For more effective control of the quality of the implementation of projects and timely detection of potential problem projects, we suggest that the introduction of the following actions be considered:

- Verify the applicants and, in particular, the formal information stated in the applications, e.g. contact details, names of people etc.

- Introduce an obligation for the recipients to deliver a list of project participants including contact details to the subsidy provider (see the recommendation for Problem Area 6) and randomly verify the information given by the recipients.
- Introduce factual control of the implementation of projects, not just formal, as is the current practice (by introducing an obligation for the recipients to announce in advance seminars or other events, and random inspections of whether these events actually took place).

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR p. 10.

Recommendation 2.9 – Make the evaluation and assessment process of the functioning of the Programme and projects more effective

To make the Programme evaluation and assessment process more effective, the evaluator suggests that the following actions be taken:

- Linking and making available to individual public administration institutions of databases that are important for assessing the efficiency of the support under the HREOP. Given the complexities of linking the databases, we recommend to temporarily
- Discuss the means and conditions of cooperation and communication between public administration bodies so that it is not necessary to officially request for cooperation in every survey.
- Determine and, where appropriate, provide an exhaustive list of information that may be requested by the evaluators from the recipients regarding the provisions of the personal data protection law or any other laws. State, ideally already in a letter of engagement, that the evaluator is bound by confidentiality and can access certain data necessary for the assessment of the Programme or a project.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 12.

Recommendation 2.10 – Make the evaluation and assessment process of the functioning of the Programme and projects more effective

Define more precisely monitoring indicators with emphasis on their qualitative dimension and strengthening the role of result indicators.

For details on this recommendation, see the Bad Practice Study in Annex 3 to the FR, p. 22.

5.2 RECOMMENDATIONS FOR ENTIRE PRIORITY AXIS 5

In the HREOP PA5 projects implemented so far, **there is a potential for the mainstreaming** of outputs and results achieved; nevertheless, in order for these activities to be successful, it will be necessary to reflect the below summary of key recommendations and suggestions for the subsequent programming period 2014 - 2020.

Recommendation 3.1 – In calls for the submission of international cooperation projects, accentuate and consequently assess the precise targeting of awareness-building activities – emphasise on the factual applicability and usability of projects’ results and outputs in practice

Innovation becomes innovation when successfully placed on the “market”. Therefore, the intention to support the factual applicability in practice of results and outputs achieved by PO5 projects has to be clearly emphasized and declared in the calls for international cooperation. Increasing awareness is undeniably important; nevertheless, for achieving and assessing the effects of supports provided it is necessary to declare, already at the project level, specific forms of mainstreaming, their precise targeting and the possibility to retroactively evaluate the efficiency of awareness-building activities.

For details on this recommendation, see the analysis of EQ 3.1 and EQ 3.2 (findings of micro-studies).

Recommendation 3.2 – Require a description of the method for the ex-post evaluation of the success of supported activities in the calls for the submission of international cooperation projects

In the case of training activities for target groups, it is necessary to require already in the terms of calls for applications that accurate records of the basic information of supported persons be kept (i.e. name and surname, date of birth). In the case of process innovation, the applicant should present a clear picture of the ex-post evaluation of the success of the activities (e.g. from the point of view of supported persons applying the new processes). If the applicant is not able to define the evaluation system, the project application should not be supported at all. Supported final recipients should objectively specify the method for the ex-post evaluation of the success of the supported activities. In current PO5 projects directed at methodologies or creating systemic legislative recommendations, it should be also possible to provide subsidies for specific activities associated with the application of such methodologies in practice.

For details on this recommendation, see the analysis of EQ 3.3 a).

Recommendation 3.3 – Require a wider geographical coverage of the CR in calls for applications focused merely on the mainstreaming of the outputs and results of international cooperation projects

In calls relating merely to mainstreaming, i.e. not to creating or testing innovation, emphasis should be placed on a wider geographical impact of supported projects within additional mainstreaming activities. More accent should be put on a wider impact on other target groups or entities with a potential to have a real influence on micro-regional or regional labour markets (i.e. employers, employment agencies, associations). In addition to the form of the mainstreaming of the activities, proposed projects should make a clear determination of the wider geographical impact that should span across the borders of a Region. This will more significantly contribute to increasing the effectiveness of HRE strategies and policies.

By contrast, in calls directed at developing, adapting, testing or introducing innovation, it is necessary to accentuate a wide geographical coverage of more Regions as the best current PO5 projects were implemented with a geographical impact in just 1 Region.

For details on this recommendation, see the analysis of EQ 3.1 and EQ 3.2.

Recommendation 3.4 – Accentuate the assessment of the strategic coverage of the CR for mainstreaming activities in subsequent evaluations

The current programming period 2007 – 2013 is in its last phase of implementation; therefore, the European Commission is justified in increasing the requirements for the documentation of results achieved by supported projects and the identification of the degree of contribution of individual Operational Programmes to the strategic goals of the EU (namely Europe 2020). The Managing Authority of the HREOP should define strategies which in its belief need to be strengthened in the long-term. These strategies in which mainstream activities were and will be carried out by should be subject to assessment in subsequent evaluations. The following areas can be recommended by the IREAS research team related to the potential to contribute to the fulfilment of the goals of Europe 2020:

- social inclusion (i.e. ensuring participation in employment and equal access to all resources, rights, goods and services; preventing the risk of social exclusion; assisting the most vulnerable; mobilizing all relevant actors);
- increasing employment of specific disadvantaged groups of citizens (e.g. people with disabilities, 50+ people, women after maternity leave, ethnic minorities).

For details on this recommendation, see the analysis of EQ 3.2.

6 OVERVIEW OF SEPARATE ANNEXES

Annex 1: Input for the Annual Report

Annex 2: 30 Case Studies of Good Practice

Annex 3: 10 Case Studies of Bad Practice

Annex 4: Micro-Studies of the Best Assessed Projects in PA5

Annex 5: Technical Report and Annexes Thereto