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***Executive Summary of the Mid-
term Evaluation 2019 of the
Operational Programme for
Social Inclusion and the Social
Economy***

***(Co-financed by the European Social Fund, OP 2014-
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This report includes the main findings of the **second mid-term evaluation of the Operational Programme for Social Inclusion and the Social Economy 2014-2020**, considering the **design, implementation, effectiveness, results and impact** evaluation criteria that have occurred around the program since its inception until December 31, 2018.

To carry out this report, **a mixed methodology** has been used, combining quantitative and qualitative analysis and triangulating the results for the evaluation's purposes. The tools used have been: **structured interviews** with all the OP's Intermediate Bodies and OP beneficiaries; a **consultation through a telematic platform** to all the managing bodies of the program; analysis of two previously identified through interviews and documentary review case studies; a **telephone survey** of a representative sample of OP participants; compilation, treatment and statistic analysis in an aggregate manner of all the information relative to **productivity and common and specific results indicators** available until December 31, 2018 and integration of all the information into a single database and statistical treatment of **microdata** and results of the OP participants up to the reference date. Finally, 4 actions of various kinds that can be considered **good practices** in the Programme have been compiled.

This executive summary is **a brief summary of some of the conclusions** issued in the evaluation report and is structured in three blocks of contents that integrate its three different sections: OP managing and implementation, results and impact, Horizontal Principles and the Strategy Europe 2020 (and the European Pillar of Social Rights).

OP MANAGEMENT AND IMPLEMENTATION

The OP **responds to the identified needs** related to the situation of the **most disadvantaged people and in situation or risk of social exclusion**, in terms of combating their low levels of **insertion and training**.

To this end, a set of actions of various kinds is being developed with a reasonable degree of financial implementation (**42.14%**), especially if taking into account those already started but that have not been certified, given that they are not completed (**86.47%**).

Considering the classification by categories of region, the most developed are those that are driving the program significantly (**88.36% executed**), but the regions in transition (**17.60%**) and less developed (**13.96%**) are not yet reaching the expected and desirable pace.

Taking into account that the Programme is structured in Priority Axes, these also present differences in their degree of implementation. **Priority Axis 2** (Promote social inclusion, fight against poverty and any form of discrimination) is the most relevant of the OP, both financially, with values close to 90% of the total budget and regarding the level of execution, with better absorption levels than the rest of the axes.

The other axes have a lower percentage of execution. Although their weight in the OP as a whole is clearly lower than that of Axis 2, it is important that there are fostered and that they develop successfully, since the actions foreseen in Axis 1 are linked to the creation of companies, especially within the social economy and to promote equality between women and men. On the other hand, Axis

6 is also relevant, as it provides interesting methodologies in the field of social innovation and Axis 7 encompasses international projects and networks.

Regarding the **profile of people** the OP has finally reached and its alignment with the planned objectives, it should be noted that the Programme is **having a greater impact on men than on women** overall, so it seems that **it is not responding to previously identified gender gaps**. However, the behaviour of women in terms of results is more favourable than that of men.

On the other hand, the Programme is **reaching a large volume of people in a situation of special vulnerability** that, without the European Social Fund, it would be very difficult for them to be served, at least with this level of outreach.

The best and greatest attention to the profiles the OP is addressed to is being fostered by the incorporation of entities of the third sector that have a highly professional and experienced human team working with these groups. Nevertheless, it should also be added that the articulated mechanism to incorporate these entities through a competitive bidding process is causing the proceedings to lose continuity and to increase the administrative burden.

Another key factor is that, in some cases, **the design of the operations does not reflect the particularities of the territory** where they are carried out and it does not take into account previous analysis of gender impact, which may vary depending on the area where actions are developed. In addition, there are difficulties in the "recruitment" of potential participants, especially in those regions where there is not enough capacity to absorb the volume of interventions.

With respect to the dissemination mechanisms and knowledge of the actions co-financed by the ESF, the **most effective way is proximity**, followed closely by Internet campaigns.

Regarding the effectiveness of the products, in **Priority Axis 1** the degree of execution is still far from what was expected, but it does not seem to be at risk of non-compliance with the established objectives, due to the fact that there is a significant volume of selected operations that have not yet shown results but are in process of execution. This situation also occurs in general in **Priority Axes 6 and 7**, however, deviations are especially significant in two situations: in Priority Axis 6, a different degree of execution is observed depending on the category of region and in Priority Axis 7, the overall balance shows an average degree of results' achievement compared to what was expected.

With respect to the **Performance Framework**, there is compliance in **Priority Axis 1** in the categories of region A and B and the success rates are well above expectations. In the **regions in transition and less developed regions** (Axis 1C and 1D) the PF is not fulfilled though it is **not a serious breach**.

In **Priority Axis 2**, the milestone for 2018 is **fulfilled in all categories of regions** and in all the indicators that were planned for both men and women. It is highly significant that the degree of compliance is well above what was expected.

The Performance Framework of **Priority Axis 6** shows differences depending on the category of region but it is fulfilled without problems in the **Axes 6C and 6D**, although the degree of progress towards 2023 is unequal according to the productivity indicator concerned. **Axis 6A does not comply with the Performance Framework** because the financial indicator does not reach 85%, even though the productivity indicator multiplies the objective by four. **Axis 6B** also shows a **breach of the**

Performance Framework, serious in this case, because one of the two indicators (the financial indicator) does not reach 65% of the 2018 milestone.

As for **Priority Axis 7**, it is aligned in its entirety with the foreseen milestones and therefore the Performance Framework is met.

RESULTS AND IMPACT OF THE PROGRAMME

The analysis is made based on the result indicators recorded by the Operational Programme for which a goal in 2023 has been set and the alignment degree with the value reached is assessed. It should be borne in mind that the results' degree of execution is subject to the fact that, though there may be an adequate rate of execution, there are no results available at this point due to the multi-year nature of some projects and to the fact that some of them have not yet finished.

Specifically, both in **Priority Axis 1** and in **Priority Axis 2** there is no homogeneous behaviour of the results. With a gender perspective, it seems that **women show a better trend in terms of results than men**, that is, while they participate to a lesser extent in the framework of the OP, their behaviour seems more favourable.

In **Priority Axis 6**, the degree of efficiency that is produced is adequate, even showing values that are much higher than expected, but with differences depending on the category of region.

In the case of **Priority Axis 7**, quantified results are not yet available and, therefore, could not be assessed in this evaluation.

Regarding the results and overall impact of the OP, the first element that stands out is that the **global results** show that the values linked to the **improvement of employability through labour insertion** have a **better performance** than those indicators that measure the achievement of a qualification.

The comparison of the indicators of immediate results values with the indicators of long-term results shows that the long-term indicators are lower. Therefore, it seems that, at this moment, there is a **certain weakness for the sustainability of the results**, but this conclusion should be analysed and contrasted at a later moment in time, when the long-term results are more consolidated. The exception to this can be seen in the fact that the indicator referring to activation in the labour market or in education or training systems shows very positive values. As a conclusion, it seems that the OP **though it does not show high insertion values, is helping people who take part in it to mobilize for a possible future insertion in the labour circuit.**

If insertion is valued in social terms, it seems that the Programme **is encouraging the insertion of people in a situation of extreme vulnerability**, as well as of **elderly people** that have been excluded from the labour market, not so much at a quantitative level but at a qualitative one, as they have special difficulties for being re-inserted in the labour market.

In fact, the statistical analysis indicates that age is not a relevant variable in terms of increasing the probability of obtaining a positive result. Therefore, the Programme is **mitigating eventual inequality situations among older people who can face more difficulties when trying to have access to the labour market.**

By contrast, **vulnerability** is shown as a **decisive variable** for increasing or not probability of obtaining a good result. That is, those people who fall into the category of “disadvantaged groups” are more likely to have a good result within the Programme than the non-disadvantaged ones.

When analysing the results by **category of region**, there are no relevant differences among them. This means that the Programme is contributing to **mitigate eventual differences** that may exist among the different categories of region.

From the statistical analysis, it can be deducted that once a person is facing one of the vulnerable situations, the gender effect is annulled, thus not showing double discrimination in the case of women (due to the situation in which social exclusion and sex occur).

Concerning **age**, the Programme is being more effective among younger people, as they are obtaining better values in comparison with older ones. Therefore, young people have a higher capacity of alignment with labour market, if the resources are provided. However, by analysing the statistical probability of obtaining a positive result of the variable “age”, it seems not relevant and therefore it can be said that the Programme is mitigating the previous difficulties that people under 25 years of age may be facing when incorporating to the labour market.

In addition, another feature observed in the global labour market is that those **people with higher educational level** show better behaviour in terms of obtaining good results.

Lastly, data show that those people **previously unemployed** have a **better** behaviour in terms of **results**. When statistically valued, the identified participant’s labour situation identified prior to his/her participation in the OP has no relevance in the prediction of whether the person is more likely to improve or not, once the mentioned variables have been included in the model.

HORIZONTAL PRINCIPLES, EUROPE 2020 STRATEGY AND EUROPEAN PILLAR OF SOCIAL RIGHTS.

When taking into account **the role of the OP partners**, it can be positively highlighted that, apart from the traditional role of the Intermediate Body, some calls have been articulated on a competitive basis allowing the entrance to those third sector entities with a large experience on project implementation directly linked to the Programme’s strategy. This mechanism is producing an **enriching effect both on the diversity of actions** that are being developed by several agents involved in project implementation as well as on the results.

For the same reason but in the opposite direction, the existence of a wide number of organisms makes Programme **management and monitoring more complex**, given that it is needed to coordinate a large number of people and entities with many different characteristics in terms of knowledge and experience on the European Social Fund.

On the other hand, the **horizontal principle of equal opportunities between men and women** is being **successfully** applied through mainstreaming actions and other specific measures that contribute to improving the levels of equality between women and men. These specific measures are applied by the great majority of organisms (both public and private), especially by the Beneficiary Organizations who show special sensitivity in this matter.

Once the data have been analysed it can be concluded that, though the OP is not achieving equal participation, it is achieving better results regarding women. Bearing in mind that a high number of specific actions addressed to women have been identified, it could be thought that these actions do not have a high scope in terms of the number of women they reach but rather they are producing satisfactory results. That is to say, **obtaining results is being prioritized to the volume of participating women.**

Nevertheless, there are elements linked to employment where there is more difficult to produce an impact as it is the case of getting women to enter masculinized sectors: even in pre-employment training there is less presence of women in courses related to digitization, including within younger profiles.

In the case of the principle of **non-discrimination**, it must be borne in mind that the OP is mainly aimed at the most vulnerable people, at risk of social exclusion and those who are object of some type of discrimination. In addition, non-discrimination is a priority among the agencies involved in the execution of the Programme, especially if taking into account that an important part of them have as an identity sign combatting discrimination in different areas, whether by sex, race or ethnic origin, disability, etc.

Sustainable development is not a priority in concrete actions beyond sensibilization and awareness raising towards protection of the environment such as the reduction of paper consumption, recycling, energy saving, etc. However, some **initiatives in the field of circular economy and green employment stand out**, not only in order to contribute to sustainable development but also with the idea of directing the creation of employment towards these sectors for them to become sustainable over time and for the employment to be of higher quality.

Finally, with regard to the **European Pillar of Social Rights**, almost the entire Programme, through Priority Axis 2, is directly related to the **objective of combating poverty and social exclusion.**