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**REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND
THE COUNCIL**

on the activities of the European Globalisation Adjustment Fund in 2011

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1. INTRODUCTION

The European Globalisation Adjustment Fund (EGF) was set up by Regulation (EC) No 1927/2006¹ to show solidarity with, and provide support to, workers made redundant as a consequence of major structural changes in world trade patterns. It was designed as a means of reconciling the overall long-term benefits of open trade in terms of growth and employment with the short-term adverse effects which globalisation may have, particularly on the employment of the most vulnerable and lowest-skilled workers. The rules were amended by Regulation (EC) No 546/2009 of 18 June 2009² to respond more effectively to the global financial and economic crisis.

Article 16 of Regulation (EC) No 1927/2006 requires the Commission to send to the European Parliament and to the Council each year a quantitative and qualitative report on the activities of the EGF in the previous year. The report should focus mainly on the results achieved by the EGF and should, in particular, contain information relating to applications submitted, decisions adopted and actions funded, including their complementarity with actions funded by the Structural Funds, in particular the European Social Fund (ESF), and the winding-up of financial contributions made. It should also document requests that were refused owing to a lack of sufficient appropriations or to non-eligibility.

2. OVERVIEW OF THE ACTIVITIES OF THE EGF IN 2011

In 2011, the Commission received 26 applications for contributions from the EGF, which was slightly less than in 2010 (31 applications). Details of the applications are given in section 4.1 and in Table 1.

The Budgetary Authority took 22 decisions to mobilise the EGF in 2011 amounting to a total of EUR 128 167 758, which is a 54.1% increase in terms of EGF co-financing compared to 2010. Details of the contributions granted are set out in section 4.2 and in Tables 2 and 3.

The Commission received four final reports in 2011 on the implementation of EGF contributions. Details of the results are given in section 4.4 and in Table 4. Five EGF contributions granted in previous years were wound up (details in section 4.6.4 and Table 6). Details of technical assistance at the initiative of the Commission (Article 8(1) of the EGF Regulation) are given in section 4.6.2 and in Table 5.

In 2011, the Commission submitted to the European Parliament and to the Council a proposal to extend the temporary ‘crisis derogation’ (applicable to EGF applications submitted up to 30.12.2011) until the end of 2013. Details are given in section 3. The Commission submitted a proposal for a Regulation of the European Parliament and of the Council for the period 2014-2020. Details are given in section 4.5.

¹ Regulation (EC) No 1927/2006 of 20 December 2006 on establishing the European Globalisation Adjustment Fund, OJ L 406, 30.12.2006, p. 1, as corrected by OJ L 48, 22.2.2008, p. 82, for all languages and OJ L 202, 31.7.2008, p. 74, for the English language only.

² Regulation (EC) No 546/2009 of the European Parliament and of the Council of 18 June 2009 amending Regulation (EC) No 1927/2006 on establishing the European Globalisation Adjustment Fund (OJ L 167, 29.6.2009).

3. FOLLOW-UP TO THE 2010 ANNUAL REPORT ON THE ACTIVITIES OF THE EGF

Regulation (EC) No 546/2009 amending Regulation (EC) No 1927/2006 establishing the EGF

The 2009 amendment of Regulation (EC) No 1927/2006 with its temporary and permanent modifications brought about further significant improvements to the EGF, providing better conditions for Member States to apply for EGF co-funding in support of their responses to the negative impact of the global financial and economic crisis on employment.

Applying for EGF support was made a lot easier by the temporary ‘crisis derogation’³ allowing the EGF to support workers made redundant as a result of the global financial and economic crisis and increasing the EGF contribution from 50% to 65% of total costs. The permanent changes, i.e. the reduction of the threshold from 1 000 to 500 redundancies and the extension of the implementation period from 12 to 24 months from the date of application, also had a positive impact: Member States were able to request EGF support for workers made redundant by smaller enterprises and to programme longer support for the workers than was possible in the past. The impact of the longer duration of EGF support on the employment and employability of redundant workers will be apparent after completion of the projects.

In the first quarter of 2011, the Commission organised consultations with Member State representatives, the implementing bodies and the social partners on whether or not to extend the ‘crisis derogation’ beyond 2011 and, in parallel, regarding the post-2013 future of the EGF (see also section 4.5). In June 2011, the Commission adopted a proposal⁴ to extend the ‘crisis derogation’ until the end of 2013, which was fully endorsed by the European Parliament on 21 September 2011. However, despite extensive debates in the Council and various compromise solutions, the Commission proposal did not receive a qualified majority in the Council. Since no political agreement on the extension of the ‘crisis derogation’ was reached, as from 31 December 2011 applications for EGF support can be justified only on the grounds of structural changes in world trade patterns, and the co-funding rate has been reduced to the original 50% of total eligible costs.

Facilitating decision-making on EGF applications: procedure for submitting proposals to the Council and the European Parliament

The EGF contributions granted in 2011 were processed under the new EGF decision-making procedures established towards the end of 2009. The efforts that began in 2010 to speed up decision-making within the rules of the present Regulation were pursued in 2011, and in particular in the context of the post-2011 and post-2013 consultations. Preparations for a specific seminar for Member State representatives (which took place in March 2012) were made, in order to address various issues related to the efficient implementation of the Fund.

³ Applicable for EGF applications submitted between 1.5.2009 and 30.12.2011, according to Article 1(1a) of the amended EGF Regulation.

⁴ Commission proposal of 10 June 2011 COM(2011) 336 final.

4. ANALYSIS OF THE ACTIVITIES OF THE EGF IN 2011

4.1. Applications received

The 26 applications received by the Commission in 2011 (see Table 1) were five fewer than in 2010 (31 applications⁵). Regulation (EC) No 546/2009, adopted on 18 June 2009, applies to all of these (i.e. 65% co-funding rate, 24-month implementation period from the date of application, etc.). A significant increase in crisis-related applications was noted towards the end of 2011, illustrating that Member States sought to benefit as much as possible from the enhanced provisions of the ‘crisis derogation’ before its expiry at the end of December 2011: 12 out of the 18 applications submitted by Member States in December 2011 were crisis-related.

The 26 applications were submitted by 10 Member States, targeted 16870 redundant workers and requested a total of EUR 77546044 from the EGF. Amounts not yet approved are indicative, as they may still change during the assessment phase. Two Member States were first-time applicants in 2011: Greece and Romania.

⁵ Including two cases which were withdrawn in 2011 (EGF /2010/023 ES/Lear and EGF/2010/024 NL/ABN Amrobank).

Table 1 — Applications received in 2011

Application reference	MS	Case	Sector	Application date	Art. 2		Art. 1		MS amount	EGF amount	Workers targeted for assistance	EGF amount / person
					Intervention criterion *)	derogation from	Direct result of the global financial and economic crisis	major structural changes in world trade patterns due to globalisation				
Regulation (EC) No. 546/2009 amending Regulation (EC) No. 1927/2006 applies to all applications received from 1 May 2009												
EGF/2011/001	AT	Nieder- und Oberösterreich	Transport	03.01.2011	b		x		1 962 030	3 643 770	502	7 258.51
EGF/2011/002	IT	Trentino Alto Adige	Construction	07.02.2011	b		x		2 110 150	3 918 850	528	7 422.06
EGF/2011/003	DE	Amsberg-Düsseldorf	Automotive	09.02.2011	b		x		2 341 160	4 347 868	778	5 588.52
EGF/2011/004	EL	Aldi Hellas	Retail	10.05.2011	a		x		1 571 500	2 918 500	642	4 545.95
EGF/2011/005	PT	Norte-Centro	Automotive	06.06.2011	b		x		817 635	1 518 465	726	2 091.55
EGF/2011/006	ES	Valencia	Construction	01.07.2011	b		x		884 170	1 642 030	720	2 280.60
EGF/2011/007	IT	Lazio	Ceramics	28.07.2011	ce	b	x		1 248 576	2 318 784	406	5 711.29
EGF/2011/008	DK	Odense Steel Shipyard	Shipbuilding	28.10.2011	a		x		3 475 826	6 455 104	550	11 736.55
EGF/2011/009	NL	Gelderland Construction 41	Construction	15.12.2011	b		x		2 078 125	3 859 375	500	7 718.75
EGF/2011/010	AT	Austria Tabak	Tobacco products	20.12.2011	ce	a		x	2 519 515	4 679 100	320	14 622.19
EGF/2011/011	AT	Soziale Dienstleistungen	Social work	21.12.2011	b		x		3 682 350	6 838 650	350	19 539.00
EGF/2011/012	NL	Noord Brabant-Zuid Holland	Construction 43	21.12.2011	b		x		1 624 948	3 017 760	600	5 029.60
EGF/2011/013	DK	Flextronics	Electronics	21.12.2011	cl	a		x	763 795	1 418 476	153	9 271.08
EGF/2011/014	RO	Nokia	Mobile phones	22.12.2011	a			x	1 728 370	3 209 830	1 416	2 266.83
EGF/2011/015	SE	AstraZeneca	Pharmaceuticals	23.12.2011	a			x	2 329 306	4 325 854	700	6 179.79
EGF/2011/016	IT	Agile	ICT software	30.12.2011	a		x		2 933 000	5 447 000	1 100	4 951.82
EGF/2011/017	ES	Aragon	Construction 41	28.12.2011	b		x		700 000	1 300 000	743	1 749.66
EGF/2011/018	ES	Pais Vasco	Metal products	28.12.2011	b		x		699 755	1 299 545	500	2 599.09
EGF/2011/019	ES	Galicia	Metal products	28.12.2011	b		x		1 092 665	2 029 235	450	4 509.41
EGF/2011/020	ES	Valencia	Shoe manufacture	28.12.2011	b			x	878 535	1 631 565	876	1 862.52
EGF/2011/021	NL	Zalco	Basic metals	28.12.2011	a		x		991 630	1 841 599	616	2 989.61
EGF/2011/022	ES	Castilla,Leon-La Mancha	Wooden doors	29.12.2011	b		x		606 095	1 125 605	350	3 216.01
EGF/2011/023	IT	Antonio Merloni	Domestic appliances	29.12.2011	a		x		1 033 444	1 919 252	1 517	1 265.16
EGF/2011/024	IT	Medcenter Container Terminal	Warehousing and storage	29.12.2011	a		x		1 200 269	2 229 071	747	2 984.03
EGF/2011/025	IT	Lombardia	Electronic equipment	30.12.2011	b		x		980 182	1 820 338	568	3 204.82
EGF/2011/026	IT	Emilia Romagna	Motorcycles	30.12.2011	b			x	1 502 533	2 790 419	512	5 450.04
Total applications received in 2011: 26							20	6	41 755 563	77 546 044	16 870	
							77%	23%	1 605 983	2 982 540	649	4 596.68
average figures												
The simplified procedure introduced in 2009 to seek the approval of the Budgetary Authority has been used in the case of all 2011 applications.											Data as of 31/12/2011	
*) ce: Article 2(c) exceptional circumstances cl: Article 2(c) small labour market												

4.1.1. Applications received by Member State and sector

The 26 applications related to 20 sectors⁶. Eight of these are sectors for which an EGF application was presented for the first time in 2011: they are underlined in the list below.

Austria (three applications: road transport, tobacco products, social work activities), Denmark (two applications: electronic equipment, shipbuilding), Germany (one application: automotive), Greece (one application: retail trade), Italy (seven applications: construction of buildings, ceramics, domestic appliances, ICT services, warehousing and storage, electronic equipment, motorcycles), Netherlands (three applications: construction of buildings, specialised construction activities, basic metals), Portugal (one application: automotive), Romania (one application: mobile phones), Spain (six applications: construction of buildings, metalworking industry, shoe manufacture, carpentry and joinery), Sweden (one application: pharmaceuticals).

⁶ Construction of buildings (4), automotive (2), electronic equipment (2), metalworking industry (2), shipbuilding (1), shoe manufacture (1), basic metals (1), retail trade (1), ceramics (1), specialised construction activities (1), mobile phones (1), carpentry and joinery (1), domestic appliances (1), road transport (1), tobacco products (1), social work activities (1), pharmaceuticals (1), ICT services (1), warehousing and storage (1), motorcycles (1).

4.1.2. Applications received by amount requested

Every Member State applying for EGF support must design a coordinated package of measures that best fits the targeted workers' profile, and decide on the amount of assistance to request. The EGF Regulation does not recommend or limit the total amount requested, but the Commission's assessment of an application may raise issues prompting the Member State to revise the proposed package of personalised services, thereby affecting the amount requested.

The EGF contributions requested in 2011 ranged from EUR 1 125 605 to EUR 6 838 650 (average EUR 2 982 540).

4.1.3. Applications received by number of workers targeted for assistance

The total number of workers targeted by the measures proposed for co-financing by the EGF was 16 870, which is around 72% of the total number of workers made redundant (around 23 500 redundancies were declared by the 10 Member States in the 26 applications submitted). The numbers ranged from 153 to 1 517 targeted workers, with three applications targeting more than 1 000 and six applications targeting fewer than 500 workers. The number of workers affected by a redundancy event and the number targeted for EGF support can differ, because the applicant Member State may decide to focus the EGF assistance only on specific groups of workers, such as those facing exceptional difficulties in staying in the labour market and/or those most in need of assistance. Some of the affected workers may receive assistance outside the EGF, while others may find new jobs on their own or may decide to take early retirement, which means that they would not be targeted for EGF measures.

4.1.4. Applications received by amount requested per worker

The package of individualised services that Member States may propose for the redundant workers concerned is at their discretion, within the terms of the Regulation. The amount requested per worker affected can therefore vary according to the severity of the redundancy event, the situation of the labour market affected, the individual circumstances of the workers targeted, the measures already provided by the Member State, and the cost of providing the services in the Member State or region concerned. This explains why the amounts proposed per worker in 2011 varied from slightly above EUR 1 200 to over EUR 19 000.

4.1.5. Applications received by intervention criterion

Of the 26 applications submitted, 20 (77%) were intended to support workers made redundant as a direct result of the financial and economic crisis (Article 1(1a) of the amended EGF Regulation), while the remaining six applications (23%) were intended to respond to major structural changes in world trade patterns due to globalisation.

Eight applications were based on Article 2(a) of the EGF Regulation, 15 were based on Article 2(b), two applications referred to Article 2(c), citing exceptional circumstances, and one application referred to Article 2(c), citing a small labour market.

4.2. Contributions granted

In 2011, the Budgetary Authority took 22 decisions to draw on the EGF to co-finance active labour market policy measures (see Tables 2 and 3 for an overview and a breakdown of the workers' profiles). Five of these concerned applications made in 2011, while 16 concerned

applications received in 2010 and one was in response to an application received in 2009. Regulation (EC) No 546/2009, adopted on 18 June 2009, applies to all contributions granted (i.e. 65 % co-funding rate, 24-month implementation period from the date of application, etc.).

The 22 contributions granted targeted 21 213 redundant workers in twelve Member States with a total of EUR 128 167 758 paid from the EGF (25.6% of the annual maximum amount available to the EGF). This represents a 54.1% increase in terms of EGF co-financing compared to 2010 (EUR 83 171 941 for 30 contributions granted⁷).

Table 2 — Details of contributions granted in 2011

Application reference	MS	Case	Sector	Application date	Art. 2		Art. 1		MS amount	EGF amount	Workers targeted for assistance	EGF amount / person	Decisions taken by the Budgetary Authority to mobilise the EGF fund	Payments drawn on the 2011 budget (up to 31/03/2012) (Art 13 of EGF Regulation)
					Intervention criterion	Direct result of the global financial and economic crisis	Major structural changes in world trade patterns due to globalisation							
Regulation (EC) No. 546/2009 amending Regulation (EC) No. 1927/2006 applies to all applications received from 1 May 2009														
EGF/2009/019	FR	Renault	Automotive sector	9.10.2009	a	x			13 188 821	24 493 525	3 582	6 837.95	21.12.2011	29.2.2012
EGF/2010/007	AT	Steiermark-Niederösterreich	Basic metals	9.03.2010	b	x			4 461 105	8 284 908	356	23 272.21	27.9.2011	28.10.2011
EGF/2010/008	AT	AT&S	Printed circuit boards	11.03.2010	ce		x		657 530	1 221 128	74	16 501.73	27.9.2011	28.10.2011
EGF/2010/010	CZ	Unilever	Retail sector	24.03.2010	a	x			174 365	323 820	460	703.96	5.4.2011	17.05.2011
EGF/2010/013	PL	Podkarpackie	Machinery/Equipment	27.04.2010	b	x			244 230	453 570	200	2 267.85	5.4.2011	17.05.2011
EGF/2010/017	DK	Midtjylland machinery	Machinery/Equipment	11.05.2010	b		x		2 124 019	3 944 606	325	12 137.25	25.10.2011	24.11.2011
EGF/2010/019	IE	Construction 41	Construction	9.06.2010	b	x			6 832 990	12 689 838	3 205	3 959.39	16.11.2011	21.12.2011
EGF/2010/020	IE	Construction 43	Construction	9.06.2010	b	x			11 665 311	21 664 148	2 228	9 723.59	16.11.2011	21.12.2011
EGF/2010/021	IE	Construction 71	Construction	9.06.2010	b	x			747 288	1 387 819	554	2 505.09	16.11.2011	21.12.2011
EGF/2010/022	DK	Glasfiber	Wind turbines	7.07.2010	a		x		3 363 993	6 247 415	825	7 572.62	6.7.2011	2.8.2011
EGF/2010/025	DK	Odense Steel Shipyard	Shipbuilding	6.10.2010	a	x			7 636 409	14 181 901	950	14 928.32	6.7.2011	2.8.2011
EGF/2010/026	PT	Rohde	Shoe manufacture	26.11.2010	a	x			780 500	1 449 500	680	2 131.62	25.10.2011	24.11.2011
EGF/2010/027	NL	N Brabant Div 18	Printing industry	20.12.2010	ce	x			359 597	667 823	199	3 355.89	27.9.2011	27.10.2011
EGF/2010/028	NL	Overijssel Div 18	Printing industry	20.12.2010	ce	x			386 691	718 140	214	3 355.79	27.9.2011	27.10.2011
EGF/2010/029	NL	Z Holland/Utrecht Div 18	Printing industry	20.12.2010	b	x			1 426 465	2 649 148	800	3 311.44	27.9.2011	27.10.2011
EGF/2010/030	NL	N Holland/Friesland Div 18	Printing industry	20.12.2010	b	x			995 662	1 849 086	551	3 355.87	27.9.2011	27.10.2011
EGF/2010/031	BE	GM Belgium	Automotive sector	20.12.2010	a	x			5 165 963	9 593 931	2 834	3 385.30	6.7.2011	2.8.2011
EGF/2011/001	AT	Nieder- und Oberösterreich	Transport	3.01.2011	b	x			1 962 030	3 643 770	502	7 258.51	16.11.2011	6.3.2012
EGF/2011/002	IT	Trentino Alto Adige	Construction	7.02.2011	b	x			2 110 150	3 918 850	528	7 422.06	13.12.2011	29.2.2012
EGF/2011/003	DE	Arnsberg-Düsseldorf	Automotive	9.02.2011	b	x			2 341 160	4 347 868	778	5 588.52	25.10.2011	24.11.2011
EGF/2011/004	EL	Aldi Hellas	Retail	10.05.2011	a	x			1 571 500	2 918 500	642	4 545.95	16.11.2011	16.12.2011
EGF/2011/005	PT	Norte-Centro	Automotive	6.06.2011	b	x			817 635	1 518 465	726	2 091.55	13.12.2011	29.2.2012
Total decisions and payments from the 2011 budget: 22							19	3	69 013 412	128 167 758	21 213			
					86%	14%	3 136 973	5 825 807	964	6 041.94	average figures			
*) ce: Article 2(c) exceptional circumstances													Date as of 31.3.2012	
Two further applications were withdrawn by the applicant Member States in 2011 and are thus not included in the statistics : EGF/2010/023 ES/Lear from Spain and EGF/2010/024 NL/ABN Amrobank from the Netherlands.														

⁷ Not counting EUR 382 200, reimbursed by Spain for a case withdrawn in 2011 (EGF 2010/023 ES/Lear).

Table 3 — EGF contributions granted in 2011: Profile of workers

	2010/019 FR Renault	2010/007 AT Steiermark- Niederösterreich	2010/008 AT AT&S	2010/010 CZ Unilever	2010/013 PL Pockpack ie	2010/017 DK Midtjylland machinery	2010/019 IE Construction 41	2010/020 IE Construction 43	2010/021 IE Construction 71	2010/022 DK Glasfiber	2010/025 DK Odense Steel Shipyard	2010/026 PT Rohde	2010/027 NL N Brabant Div 18	2010/028 NL Overijssel Div 18	2010/029 NL Z Holland /Utrecht Div 18	2010/030 NL N Holland /Flevoland Div 18	2010/031 BE GM Belgium	2011/001 AT Nieder- & Oberösterreich	2011/002 IT Trentino Alto Adige	2011/003 DE Amsberg- Düsseldorf	2011/004 EL Aldi Hellas	2011/005 PT Norte- Centro	Total	%
Workers targeted for EGF Assistance																								
Men	2 987	343	43	219	154	251	2 945	2 132	384	606	903	88	129	139	520	358	2 430	431	483	709	155	248	16 657	78.52%
Women	595	13	31	241	46	74	260	96	170	219	47	582	70	75	280	193	404	71	45	69	487	478	4 556	21.48%
% women	16.6%	3.7%	41.9%	52.4%	23.0%	22.8%	8.1%	4.3%	30.7%	26.5%	4.9%	87.1%	35.2%	35.0%	35.0%	14.3%	14.1%	14.1%	8.5%	8.9%	75.9%	65.8%	21.5%	
Total workers targeted	3 582	356	74	460	200	325	3 205	2 228	554	825	950	680	199	214	800	551	2 834	502	528	778	642	726	21 213	100%
of which:																								
EU Citizen	3 468	354	72	460	200	325	3 205	2 228	554	825	950	680	187	201	752	518	2 693	396	401	700	632	726	20 527	96.77%
Non-EU Citizen	114	2	2	0	0	0	0	0	0	0	0	0	12	13	48	33	141	106	127	78	10	0	686	3.23%
15-24	4	96	2	42	21	28	389	821	5	84	58	1	36	39	144	99	11	77	41	19	43	3	2 063	9.73%
25-54	999	246	65	358	121	247	2 345	1 276	509	655	726	632	109	117	440	303	2 717	387	434	587	597	709	14 579	68.73%
55-64	2 579	14	7	60	40	50	391	109	33	79	162	45	50	54	200	138	105	38	52	172	2	14	4 394	20.71%
65+	0	0	0	0	18	0	80	22	7	7	4	2	4	4	16	11	1	0	1	0	0	0	177	0.83%
Workers with health problem or disability	422	11	0	n/a	n/a	0	0	0	0	n/a	0	7	8	9	32	22	42	51	n/a	136	n/a	3	743	3.5%

- workers 65+ may have been included by some MS in the '55-64' age group

- where the number of people with a health problem or a disability is high, the company may have had a policy of employing people with disabilities

4.2.1. *Actions funded with EGF assistance*

Article 3 of Regulation (EC) No 1927/2006 provides that the EGF can co-finance only active labour market measures aiming to help redundant workers back into employment. In addition, it states that the EGF may finance a Member State's preparatory, management, information, publicity and control activities for use of the funding ('implementing activities', previously called 'technical assistance').

The measures approved for the 22 EGF contributions granted in 2011 aimed to reintegrate 21 213 redundant workers into the labour market. They consisted mainly of intensive, personalised job search assistance and case management including placement research with potential employers, a variety of vocational training, upskilling and retraining measures, various temporary financial incentives/allowances for the duration of the active support measures up to the period of actual work reintegration, some mentoring during the initial phase in the new job and other types of activities such as entrepreneurship promotion/business creation, supported employment and one-time employment/hiring incentives.

When designing their support packages, Member States took into account the backgrounds, experiences and educational levels of the workers, their ability to be mobile and current or expected job opportunities in the regions concerned.

4.2.2. *Complementarity with actions funded by the Structural Funds, notably the European Social Fund (ESF)*

The EGF is designed to increase employability and ensure the rapid reintegration of redundant workers into employment through active labour market measures, thus complementing the ESF, which is the major instrument for promoting employment in the EU. Generally, the complementarity of the two Funds lies in their ability to address these issues from two different time perspectives: while the EGF provides tailor-made assistance to redundant workers in response to a specific, European-scale mass redundancy event, the ESF supports strategic, long-term goals (e.g. increasing human capital, managing change) through pre-programmed multi-annual programmes, the resources of which cannot normally be reallocated to deal with crisis situations caused by mass redundancies. EGF and ESF measures are sometimes used to complement each other to provide both short-term and longer-term solutions. The decisive criterion is the potential of the available instruments to effectively help workers, and it is up to Member States to select — and to programme — the instruments and actions best suited to achieving the objectives pursued.

The content of the 'coordinated package of personalised services' to be co-funded by the EGF should be **balanced** with other actions and **complement** them. The measures co-funded by the EGF can go well beyond standard courses and actions, and practice has shown that the EGF allows Member States to offer redundant workers better tailor-made and more in-depth assistance than would be possible without the EGF, including measures to which they would not normally have access (e.g. second or third-level education). The EGF allows Member States to focus more particularly on vulnerable people, such as the lower-skilled or those with a migrant background, and to provide support with a better counsellor-worker ratio and/or over a longer period of time than would be possible without the EGF. All this increases the workers' prospects of improving their situation.

Specific examples of good complementarity between the Structural Funds and the EGF can be found in one case submitted by Denmark (shipbuilding sector) and three cases from Ireland related to the construction sector. Regarding the first case (EGF/2010/025 DK/Odense Steel Shipyard), the EGF measures were designed to complement the actions undertaken by the regional Growth Forum aiming to promote new growth industries in the area in the long term, and which receives funding from the ESF and ERDF. Moreover, this EGF contribution is being used by Denmark to test training in new sectors and new delivery methods, for potential inclusion in mainstream programmes if the EGF implementation shows a successful outcome.

Regarding the most recent Irish cases (EGF/2010/019, EGF/2010/020, EGF/2010/021) and subsequent ones, the EGF has been included since 2010 in the process of the Monitoring Committee for the Coordination of EU Funds under the National Strategic Reference Framework, chaired by the Department of Finance and established to deal with issues relating to the implementation of the Structural Funds for the 2007-2013 period. This Committee discusses issues of relevance including the demarcation of funds in operational programmes and plans for new programmes to ensure that Funds do not overlap.

All Member States must put in place the necessary mechanisms to avoid any risk of double funding from EU financial instruments, as required by Article 6(5) of Regulation (EC) No 1927/2006.

4.3. Cases not meeting the conditions for a financial contribution from the EGF

Neither the Commission nor the Budgetary Authority rejected any application submitted by the Member States for funding from the EGF.

4.4. Results achieved by the EGF

The main sources of information on the results achieved by the EGF are the final reports presented by the Member States under Article 15 of Regulation (EC) No 1927/2006. These are supplemented by information shared by Member States in direct contacts with the Commission and during coordination meetings and conferences with Member State representatives during the year. The results and data reported by the Member States in 2011 are summarised in this section and in Table 4.

Overall, the Commission has received final reports for 20 EGF contributions (since 2008 when the results of the first EGF cases became available up to December 2011), representing about 20% of the total number of applications (97) received up to December 2011. Fifteen out of those 20 cases were also analysed by the mid-term evaluation carried out in 2011 (see section 4.7.5). Because of the limited final results so far, it is still too early to draw definite conclusions about the added value of the EGF support and the impact on dismissed workers and labour markets. As more and more final results of cases with an extended 24-month implementation period (after the increase from 12 to 24 months from the date of application, resulting from the amendment of the EGF Regulation in 2009) become available, the EGF's impact will be measured in more detail, including in the ex-post evaluation which is due by 31 December 2014 (Article 17(1b) of the EGF Regulation).

4.4.1. Final reports received from Member States in 2011 on the implementation of financial contributions

In 2011, the Commission received four final reports on the following cases: EGF/2009/004 BE/Oost-West Vlaanderen, EGF/2009/005 BE/Limburg, EGF/2009/007 SE/Volvo and EGF/2009/008 IE/Dell. These were the first EGF cases for all three Member States, and the

first completed cases with an extended 24-month implementation period. They were also the first cases to benefit from 65% co-financing from the EGF after the increase from the previous 50%.

4.4.2. Summary of the results and good practices reported in 2011

The four final reports presented by the three Member States showed that at the end of the EGF implementation period, 2352 workers (45.0% of 5228) had found new jobs or were self-employed. The others were either in education or training (approximately 10.9%), or unemployed or inactive for personal reasons (NEET: not in education, employment, or training): approximately 44.1%.

Similarly to 2010, the results in terms of reintegration into work were influenced by the reduced absorption capacities of local and regional labour markets as a direct consequence of the global financial and economic crisis. It should be noted that the reintegration rate merely provides a snapshot of the workers' employment situation at the moment the data are collected. It does not give any information on the type of employment and the quality of the work that has been found, and can change significantly in a short space of time. According to information received from several Member States in 2010 and 2011, the reintegration rates tend to rise even just a few months after submission of the final reports and increase further in the medium term, especially in cases where workers continue to receive the tailor-made assistance beyond the EGF period, at the Member States' own expense or with the help of the ESF.

The three Member States reported a series of interesting facts and encouraging information indicating that the personal situation, self-confidence and employability of the workers concerned visibly improved thanks to the EGF assistance and services, even if not all of them found new work quickly. The EGF enabled those Member States to act more intensively in the areas affected by redundancies, in terms of the number of people assisted and the duration and quality of support, than would have been possible without EGF funding. The EU funds enabled them to respond more flexibly and to include in their packages highly personalised, sometimes innovative, actions of a high quality and thus to devote more care to lower-skilled people and harder-to-help jobseekers.

Assistance co-funded by the EGF therefore represents an enhanced investment in skills, which can have a positive impact also in the medium and longer term when markets gradually recover from the crisis. The EGF was felt to be a useful instrument at a time of budget constraints, often particularly acute in the Member States and regions suffering from mass redundancies. In addition, the three Member States drew a number of lessons and conclusions which should prove useful for the preparation and implementation of future EGF cases.

Table 4 — Final reports received in 2011 — overview of results⁸

	2009 applications				Total 4 cases	
	EGF/2009/004 BE/Oost en West- Vlaanderen	EGF/2009/005 BE/Limburg	EGF/2009/007 SE/Volvo	EGF/2009/008 IE/Dell		
Sector	Textiles	Textiles	Automotive	Computers		
Date of application	05/05/2009	05/05/2009	05/06/2009	29/06/2009		
End of implementation period (as to Financing Decision)	04/05/2011	04/05/2011	04/06/2011	28/06/2011		
Final Report due date	04/11/2011	04/11/2011	04/12/2011	29/12/2011		
Workers initially targeted	1 568	631	1 500	2 400	6 099	
Workers who actually benefited from EGF assistance	508	356	1 775	2 589	5 228	
Total expenditure in € (EGF and MS contributions)	402 236	296 623	8 731 627	13 619 598		
EGF contribution in €	144 829	132 287	5 675 558	8 852 739		
	36.0%	44.6%	65%	65%		
total amount spent on personalised services : (EGF and MS contributions)	350 332	275 102	8 310 149	13 230 888	22 166 470	100%
% of total expenditure	87.1%	92.7%	95.2%	97.1%		
expenditure and number of benefiting workers broken down per category of measures *)						
Individual job search assistance & case management and general information services **)	546	409	1 775	2 589	5 319	
	134 949	1 140	753 015	192 412	1 081 516	4.9%
Training and re-training	404	347	1 021	2 806	4 578	
	209 433	272 162	7 521 469	6 596 329	14 599 392	65.9%
Promotion of entrepreneurship	0	0	25	490	515	
	0	0	35 665	3 283 375	3 319 040	15.0%
Training allowances	0	0	0	413	413	
	0	0	0	2 451 738	2 451 738	11.06%
Other allowances / grants	33	10	0	104	147	
	5 950	1 800	0	707 034	714 784	3.2%
Number of workers re-integrated into employment after EGF intervention	335	259	1 201	557	2 352	
% re-integrated into employment	65.9%	72.8%	67.7%	21.5%	45.0%	
(out of which self-employed)	9	5	18	191	223	4.3%
Total number of people in education or in training (while unemployed)	0	0	344	227	571	10.9%
% in education or in training	0.0%	0.0%	19.4%	8.8%		
Total number of workers unemployed or inactive for various personal reasons ***)	173	97	230	1 805	2 305	44.1%
% unemployed or inactive	34.1%	27.2%	12.9%	69.7%		
<p>*) workers could benefit from measures in different categories and also from more than one action in each category - this is why the number of workers for a category of measures can be higher than the total number of beneficiaries</p> <p>**) intensive, personalised job search and re-integration assistance, such as career guidance, skills certification, personalised action plans, market prospection and job matching etc.; open information services for jobseekers</p> <p>***) 'inactive' can mean that people are not available for the labour market any longer for different personal reasons such as start of pension etc.</p> <p>No measures were carried out under the following categories: 'job rotation and job sharing', 'employment and recruitment incentives', 'supported employment & rehabilitation', 'direct job creation'.</p>						

4.4.3. Details of the measures implemented, as communicated in the Final Reports received in 2011

EGF/2009/004 Oost-West Vlaanderen/Belgium (textiles)

The implementation period accorded by the Financing Decision ended on 4 May 2011. Of the 508 workers who participated in the measures co-funded by the EGF, 335 (65.9%) were in work again at the end of the implementation period (nine of them self-employed), and the remaining 173 (34.1%) were unemployed or inactive for various personal reasons (NEET).

⁸ This table was compiled by the Commission on the basis of the measures implemented by the Member States as reported in their final reports. The categories of measures are similar, but not identical, to the Eurostat methodology described in Labour market policy database — Methodology — Revision of June 2006. Some of the measures co-financed, such as job-search allowances, training allowances, and subsistence allowances during active labour market measures, do not fit into any of Eurostat's categories.

EGF/2009/005 Limburg/Belgium (textiles)

The implementation period accorded by the Financing Decision ended on 4 May 2011. Of the 356 workers who participated in the measures co-funded by the EGF, 259 (72.8%) were in work again at the end of the implementation period (five of them self-employed), and the remaining 97 (27.2%) were unemployed or inactive for various personal reasons (NEET).

The Belgian authorities reported that the two EGF contributions had allowed them to provide tailor-made assistance and training to the dismissed textile workers, which either helped them find new jobs or strengthened their position on the labour market. The EGF co-funded measures were provided by the Flemish employment and professional training service (VDAB) and the sectorial training centre for the textiles industry (COBOT). They covered individual job search support including the validation of existing textile-related skills, outplacement assistance extended to all age groups, a variety of training measures for the acquisition of generic competences and interview skills, vocational training aimed at re-employment in new sectors and functions, tailored training for workers aged 50+ as well as continued training/career guidance for those who found a new job with a view to enhancing their satisfaction and ability to remain in the new job.

Some of the implemented activities were embedded in pre-determined schemes receiving federal and regional financing, which made it impossible to calculate the EGF contribution. Because of its particular administrative circumstances, Belgium imputed only 36% (*EGF/2009/004*) and 44.6% (*EGF/2009/005*) of the total actual costs to the EGF, instead of the maximum 65% allowed. The managing authority drew a number of lessons and conclusions which should prove useful for future EGF applications.

EGF/2009/007 Volvo/Sweden (automotive)

The implementation period accorded by the Financing Decision ended on 4 June 2011. Of the 1 775 workers who participated in the measures co-funded by the EGF, 1 201 (67.7%) were in work again at the end of the implementation period (18 of them self-employed), 344 (19.4%) were in education or training and the remaining 230 (12.9%) are considered unemployed or inactive (NEET) as they left the employment service for various reasons. According to the Swedish authorities, the EGF project was successful in terms of re-integration after project implementation, compared with other projects in Sweden.

The EGF co-funded measures had great significance for the former Volvo workers as they made it possible for them to upskill for a wider labour market while at the same time providing them with personal development and financial security. The EGF contribution allowed the Swedish authorities to provide a variety of qualification measures, including vocational training directed towards occupations where generational change had been identified as a concern. Entrepreneurship training went well beyond what is normally offered by the public employment service. Particular attention was given to the quality of the EGF co-funded training (ratings were applied), which can mean a competitive advantage for the individuals concerned as compared with other unemployed workers benefiting from the standard training options.

The Swedish authorities also reported that the project had led to increased cooperation between the public employment service and the providers of national, regional and local adult education. Combining labour market policies with resources from the world of education was recognised as a significant added value with a positive multiplier effect. The findings and the

lessons learned from the Volvo project will feed into Sweden's future support activities for the unemployed.

Overall, Sweden deems the EGF co-funded measures to have been positive both for the former Volvo workers and for the local labour markets concerned. While their impact in financial terms cannot yet be measured, it should be possible to do so in the future, when the current evaluation of the project by the Swedish authorities is finalised.

EGF/2009/008 Dell/Ireland (computers)

The implementation period accorded by the Financing Decision ended on 28 June 2011. Of the 2 589 workers who participated in the measures co-funded by the EGF, 557 (21.5%) were in work again at the end of the implementation period (191 of them self-employed), 227 (8.8%) were still in education or training, and the remaining 1 805 (69.7%) were unemployed or inactive for various personal reasons (NEET).

The Irish authorities reported that support from the EGF had expanded the assistance normally available to the unemployed, and was complementary to measures supported by the European Social Fund, ERDF, etc. With the help of the EGF, the former Dell workers benefited from an increased level of personalised assistance at a time of rapidly rising unemployment both regionally and nationally. According to the Irish authorities, the number of persons who were re-employed or had started their own businesses by the end of the implementation period as well as the increased take-up of education and training opportunities had a considerable positive impact locally and regionally in economic terms. The EGF co-funded measures also had a positive impact on individuals in terms of renewed self-confidence and restoration of dignity.

The EGF co-funded measures covered a broad range of guidance, education, training and entrepreneurship support activities and were provided in close cooperation with the local, regional and national service providers. Assistance from the EGF also allowed the development of a number of newly tailored measures including higher education courses outside the mainstream curriculum, a new internship programme designed to maintain existing skills and to let people practise their newly acquired skills, and the provision of training to acquire new skills in emerging sectors or in sectors with identified skills shortages such as medical devices, financial services and logistics. Grants to facilitate applicants' participation in accredited training courses and grants to facilitate access to higher education programmes in approved private colleges were also part of the package.

The experiences gained with the Dell application have fed through to subsequent EGF applications from Ireland.

4.5. Post-2013 Review

According to Article 20 of the EGF Regulation, the whole of that Regulation has to be reviewed by 31 December 2013, which coincides with the end of the programming period 2007 to 2013. In the context of the Commission Communication 'A Budget for Europe 2020'⁹, the need to tackle pressing challenges, such as shortfalls in skills levels, underperformance of active labour market policy and education systems, social exclusion of marginalised groups and low labour mobility, has been stressed. The Commission is keen to

⁹ COM(2011) 500 final, 29.6.2011.

maintain the EGF over the next programming period 2014 to 2020, and wants specific, one-off support to be provided over this period to workers made redundant as a result of major structural changes triggered by the increasing globalisation of production and trade patterns. The EU should also be able to provide support in the event of large-scale redundancies resulting from serious disruption of local, regional or national economies caused by an unexpected crisis. Furthermore, the scope of the EGF should be extended to provide compensation in certain cases for the consequences of trade agreements in certain agricultural sectors.

In the first half of 2011, the Commission carried out consultations with Member State representatives, implementing bodies and social partners regarding the future role and potential of the EGF as a solidarity instrument. These included two Stakeholder Conferences on 25-26 January 2011 and on 8 March 2011 respectively. In October 2011, the Commission adopted a proposal¹⁰ for a future EGF taking into account the results of the consultations and the policy recommendations made in the course of the mid-term evaluation of the EGF (see section 4.7.5).

In November and December 2011, the Commission's proposal was presented at working group level to the European Parliament, the European Economic and Social Committee and the Committee of the Regions. The formal discussions in the relevant committees of the Parliament and the Council are due to take place in 2012 and 2013, the objective being that the new Regulation can enter into force on 1 January 2014.

4.6. Financial report

4.6.1. Funds contributed by the EGF

During 2011 the Budgetary Authority granted 22 contributions from the EGF, for a total of **EUR 128 167 758**, representing **25.6 % of the annual maximum amount** available (Table 2). All 22 payments came from the 2011 budget, although four were paid out at the beginning of 2012.

Under Article 28 of the Interinstitutional Agreement of 17 May 2006¹¹, which lays down the budgetary framework of the EGF, the EGF may not exceed an annual maximum amount of EUR 500 million, which can be drawn from any margin existing under the global expenditure ceiling of the previous year, and/or from cancelled commitment appropriations from the previous two years, excluding those under heading 1B of the financial framework. In addition, Article 12 of the EGF Regulation states that at least 25% of the annual maximum amount must remain available on 1 September of each year in order to cover any needs arising by the end of the year.

The **commitment appropriations** for the funds granted in 2011 were transferred from the EGF reserve to the EGF budget line. In 2011, the **payment appropriations** were sourced differently than in the past, so as to avoid as far as possible the use of ESF funds. An amount of EUR 47 608 950 (including EUR 610 000 for EGF technical assistance) was credited to the EGF budget line at the start of the year. A further amount of EUR 50 000 000 was added by means of an amending budget. During the global transfer, EUR 5 460 495 was identified and transferred to the EGF. Finally, EUR 29 650 344 was transferred from an ESF line.

¹⁰ COM(2011) 608 final, 6.10.2011.

¹¹ OJ C 139, 14.6.2006, p. 1.

Payments made for 2011 (EUR 128 167 758) were 54.1% higher than for 2010 (EUR 83 171 941 for 30 contributions granted⁷).

4.6.2. *Technical assistance expenditure*

Under Article 8(1) of Regulation (EC) No 1927/2006, up to 0.35% of the financial resources available for the year (maximum of EUR 1.75 million) can be used in the form of technical assistance on the initiative of the Commission for activities such as information, administrative and technical support, and monitoring, audit, control and evaluation activities necessary to implement the EGF Regulation. In 2011, an amount of EUR 610 000 was made available for technical assistance¹² regarding the activities listed in Table 5. The remaining EUR 1 140 000 potentially available for technical assistance during the year was not called upon.

The main difference between the budgeted amount and actual expenditure arose in the Information category, where the contribution required from the EGF towards general publications on employment and social affairs with relevance for the EGF was considerably lower than anticipated.

Table 5 — Technical assistance expenditure 2011

Description	Budgeted amount EUR	Actual amount EUR
Information (e.g. updating/expanding of EGF website in all EU languages, publications and audio-visual activities)	250 000	74 685.24
Administrative and technical support - Meetings of the Expert Group of Contact Persons of the EGF - Seminars on the implementation of the EGF (2012 seminars to exchange information and experiences, on the 2011 budget)	70 000 200 000	61 404.21 268 595.79
Monitoring (second EGF Statistical Portrait 2007-2011)	20 000	19 883.00
Creation of a knowledge base (design of an electronic form for applications)	70 000	59 300.00
Audit, control, evaluation: No contribution was used for these categories in 2011 (the mid-term evaluation of the EGF, as required by Article 17(1)(a) of the EGF Regulation, was contracted out already in 2010; and the audits carried out in 2011 were financed from other European Commission sources)		
Total	610 000	483 868.24

4.6.3. *Irregularities reported or closed*

There were no irregularities reported to the Commission under the EGF Regulation in 2011. There were no irregularities closed in 2011 under the EGF Regulation.

4.6.4. *Winding-up of financial contributions from the EGF*

Article 15(2) of the EGF Regulation lays down the procedures for winding up EGF financial contributions. In 2011, the third series of EGF contributions since the establishment of the Fund were wound up. These were the five cases shown below, which were implemented in

¹² OJ L 154, 19.6.2010, p. 27.

the years up to 2010 (12-month implementation period from the date of application and 50% co-financing from the EGF).

Table 6 — Cases wound up in 2011

<i>(all amounts in EUR)</i>	EGF/2007/005 Sardegna / Italy	EGF/2007/007 Lombardia / Italy	EGF/2008/001 Toscana / Italy	EGF/2008/005 Catalonia / Spain	EGF/2009/001 North/Centre / Portugal	Total for 5 cases
	Textiles	Textiles	Textiles	Textiles	Textiles	
Date of application	09/08/2007	17/08/2007	12/02/2008	29/12/2008	23/01/2009	
Year of approval by the Budgetary Authority	2008	2008	2008	2009	2009	
Final Report due date	08/02/2009	16/02/2009	11/08/2009	28/06/2010	22/07/2010	
Winding up date	18/08/2011	31/08/2011	31/08/2011	25/02/2011	20/01/2011	
EGF contribution granted (50 %)	10 971 000	12 534 125	3 854 200	3 306 750	832 800	31 498 875
Certified EGF share of actual expenditure (50 %) as stated in the Final Reports	1 686 211	591 331	803 279	532 116	246 492	3 859 428
Budget implementation %	15.4%	4.7%	20.8%	16.1%	29.6%	(average 12,3 %)
Unspent funds reimbursed to the Commission	9 284 790	11 942 794	3 050 922	2 774 634	586 308	27 639 447
	84.6%	95.3%	79.2%	83.9%	70.4%	87.7%

The budget implementation varied from **4.7% to 29.6%**. The total amount of unspent funds due to be reimbursed to the Commission for these five cases was **EUR 27 639 447**.

There are various reasons why Member States did not use the full amounts granted. While Member States are encouraged to make realistic budget estimates for the coordinated package of personalised services, there can be a lack of accurate and informed planning. A too high safety margin may have been included in the initial calculations which at the end turned out to be unnecessary. The number of workers wishing to participate in the proposed measures may have been overestimated in the planning phase, some workers may have opted for cheaper measures rather than more expensive ones or for short-term measures rather than long-term ones, or they may have found new jobs sooner than initially estimated. Other reasons for the low spending may have been delays in starting up the measures and failure to use the flexibility of re-allocating amounts of funding between different budget items while implementing the package of personalised services.

When comparing the forty final reports available up to July 2012 (closed cases and cases which are still being wound up), it becomes apparent that Member States during the initial phase of the Fund (when the implementation period was of twelve months only) had problems spending the allocated funds within the allotted time period. The final reports received from the end of 2011 onwards concern cases with a longer implementation period (24 months from the application date) and indicate that Member States had begun to plan their budgets more realistically, to start the measures earlier and to rebudget the measures as necessary in the course of implementation. The overall recovery rate has therefore been declining and EGF funds are being spent as planned. The Commission has been helping the Member States by means of regular information and specific seminars to encourage optimal fund management. This has meant that the high recovery rate of over 60 % for the 2007 cases was halved to around 30 % for 2008 and there are indications that this level will be maintained for the 2009 cases. The first final report for a case presented in 2010 shows a recovery rate of below 10 %.

The budgeting of the measures and the forecasting of worker participation by Member States are expected to improve with experience, and Member States are already drafting and

submitting EGF applications more efficiently than during the initial years. The timing of the arrival of the EGF funding in the locality, the capacities of the various coordination and implementation structures and the quality of communication between the national and the regional/local levels are also being improved. Member States are also making better use of the possibility to review their budgets and reallocate expenditure between the various measures and / or implementing expenditure. At the level of EU institutions, major efforts have been, and are being, made to speed up the procedures for decision-making and the payment of EGF funds, so that the time and funds provided can be used optimally. A specific seminar was scheduled by the Commission for Member States' representatives in March 2012 to address various issues related to the timing and efficiency of Fund implementation.

4.6.5. *Other reimbursements*

In addition to the reimbursed amounts shown in Table 6, one EGF contribution granted in 2010 was reimbursed to the Commission in full: **EUR 382 200** for application EGF/2010/023 (Lear), which was withdrawn by the Spanish authorities in 2011.

4.7. **Technical assistance activities undertaken by the Commission**

4.7.1. Information and publicity

Internet site

Article 9 of Regulation (EC) No 1927/2006 calls on the Commission to 'set up an internet site, available in all Community languages, to provide information on the EGF, guidance on the submission of applications, as well as updated information on accepted and refused applications, highlighting the role of the budgetary authority'.

In line with the requirements of Article 9, the EGF internet site (<http://ec.europa.eu/egf>) set up by the Commission is available in all 23 EU languages, including Irish. The EGF website recorded 284 181 pages consulted by 37 384 visitors in 2011.

Promotional actions undertaken in 2011

The Commission compiled a publication, with the help of journalists, entitled 'EGF in Action — Stories on opportunities created by the EGF'. This brochure, available from the EGF website, describes the impact of concrete EGF actions in five EU Member States (Germany, Spain, Finland, Lithuania and Portugal) and the circumstances surrounding the specific actions. In each case, individual workers who had been made redundant and subsequently benefited from EGF support tell their personal stories. The impressive testimonies show that the EGF helped these workers to improve their personal situations at a difficult time in their lives. The five cases were: EGF/2007/004 FI/Perlos, EGF/2008/003 LT/Alytaus Tekstilė, EGF/2008/004 ES/ Castilla y León & Aragón, EGF/2009/001 PT/Norte-Centro and EGF/2009/002 DE/Nokia.

EuroBarometer

The special edition of the EuroBarometer on ‘European employment and social policy’ (EBS 377¹³) of September-October 2011 included a question on the EGF which had already been asked in previous EuroBarometer Surveys (October 2008 and June 2009) to monitor changes in awareness of the Fund.

The choice of answers to the question ‘Have you ever heard or read about the European Globalisation Adjustment Fund that is a fund to help victims of globalisation?’ was as follows:

‘Yes, and I am very familiar with it’, or

‘Yes, but I am not very familiar with it’, or

‘No, I have never heard or read about it’.

The 2011 results show a slight increase in awareness of the Fund as compared to the 2009 results: across the EU, 32% of respondents had heard of the EGF, and 6% of those stated that they were ‘very familiar’ with it. 68% of those questioned replied that they had never heard of the EGF — this share remains high although it has improved by 2% in comparison with the previous survey.

4.7.2. Meetings with the national authorities and EGF stakeholders

The seventh and eighth meetings of the Contact Persons of the European Globalisation Adjustment Fund, who are the EGF representatives in the Member States, were held on 9 March 2011 and 20 October 2011 in Brussels. Part of each meeting was devoted to discussing the Commission’s proposal to extend the ‘crisis derogation’ beyond 30 December 2011⁴ and the review of the current EGF Regulation, with the Commission’s proposal for its continuation during the 2014 to 2020 period¹⁰.

On 25-26 January 2011 and on 8 March 2011, two Stakeholder Conferences were held in Brussels to discuss the future of the EGF (post-2011 and post-2013). These were financed from the 2010 technical assistance budget (Art. 8(1) of the EGF Regulation).

The EGF auditors’ Seminar (funded from the 2010 technical assistance budget) took place on 7 April 2011 in Brussels.

4.7.3. Design of an electronic form for applications

Following a call for tenders, the Commission contracted the design of an electronic EGF application form to an external company. The purpose of the new form is to reduce the time it takes from the moment an application is prepared by a Member State until adoption of the Proposal submitted by the Commission to the European Parliament and the Council.

4.7.4. Second EGF Statistical Portrait 2007-2011

Following a call for tenders, the Commission contracted the creation of the EGF’s second Statistical Portrait 2007-2011 to an external company. The Portrait is to be published in the first half of 2012.

¹³ http://ec.europa.eu/public_opinion/archives/ebs/ebs_377_en.pdf.

4.7.5. *Mid-term evaluation of the EGF*

As required by Article 17(1)(a) of the EGF Regulation, the Commission carried out a mid-term evaluation of the effectiveness and sustainability of the results obtained by the EGF, which was contracted out to external experts. The final report of the evaluation was presented at the end of 2011 and is available on the EGF website (<http://ec.europa.eu/egf>).

The evaluation was carried out at the level of the instrument as such, and at the level of the individual EGF cases and measures. The analysis of the longer-term effects of EGF support considered the supported individuals and the local employers and communities. Fifteen EGF cases in eight Member States (Finland, France, Germany, Italy, Lithuania, Malta, Portugal and Spain) were analysed. These had been implemented according to the original rules of the EGF (which applied from 2007 to the end of April 2009), i.e. threshold of 1 000 redundancies, 12 months of implementation, co-financing rate of 50%. The 15 evaluated cases are those for which the final reports were submitted by Member States from 2008 to 2010 and which were wound up subsequently¹⁴:

¹⁴ Not counting the case EGF/2007/002 FR/Renault which was withdrawn in 2009.

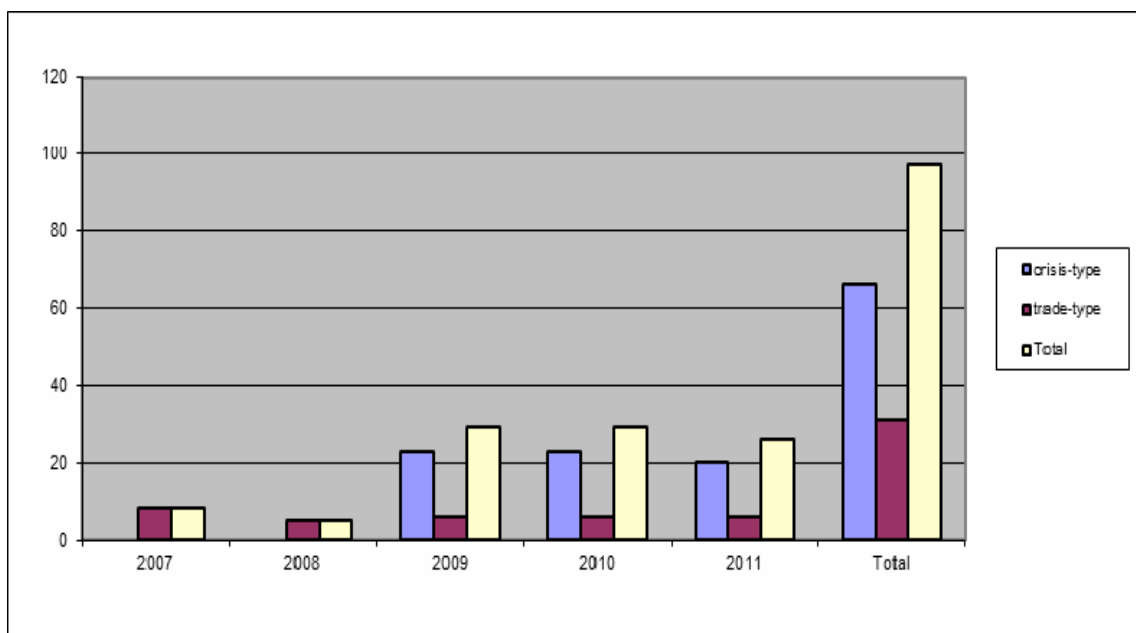
No	MS	Case	Year wound up
EGF/2007/001	FR	Peugeot	2009
EGF/2007/003	DE	BenQ	2009
EGF/2007/004	FI	Perlos	2009
EGF/2007/005	IT	Sardegna	2011
EGF/2007/006	IT	Piemonte	2010
EGF/2007/007	IT	Lombardia	2011
EGF/2007/008	MT	Textiles	2009
EGF/2007/010	PT	Lisboa-Alentejo	2010
EGF/2008/001	IT	Toscana	2011
EGF/2008/002	ES	Delphi	2010
EGF/2008/003	LT	Alytaus tekstilė	2010
EGF/2008/004	ES	Castilla Leon	2010
EGF/2008/005	ES	Catalonia	2011
EGF/2009/001	PT	North/Centre	2011
EGF/2009/002	DE	Nokia	2010

The findings of the mid-term evaluation are positive as evidence gathered shows that the EGF adds value to the actions of the Member States. After twelve months of EGF support, 42 % of the targeted workers had found new jobs, with re-integration rates increasing further in the medium term. This is a particularly good outcome considering that many of the workers supported are amongst the harder-to-help jobseekers. The EGF helped the Public Employment Services in the Member States to deal with crisis situations caused by sudden large-scale redundancies, complementing existing national efforts as well as assistance from the European Social Fund (ESF). This was even more important since most of the EGF cases related to mass redundancies in regions and localities which are already disadvantaged — compared to the respective national average — in terms of unemployment, job opportunities and economic dynamism. The EGF allows Member States to offer more personalised support to a larger number of workers, over a longer period than in their standard schemes and better tailored to each individual worker's profile and needs. Through specifically directed measures, job opportunities offered by the local labour markets can be matched with the profiles of the redundant workers receiving EGF assistance. EGF implementation also fosters good communication between national, regional and local bodies in Member States.

5. TRENDS

With the increasing number of EGF cases, more data are available to identify trends in applications and to gain an overview of the direction of the Fund's activities. The data contained in the graphs below and in the Annex relate to the 97 applications in 32 economic sectors received from January 2007 to December 2011. More detailed figures will be presented in the second Statistical Portrait of the EGF, 2007-2011, which is to be published in the first half of 2012.

Graph 1: Number of applications received, 2007-2011

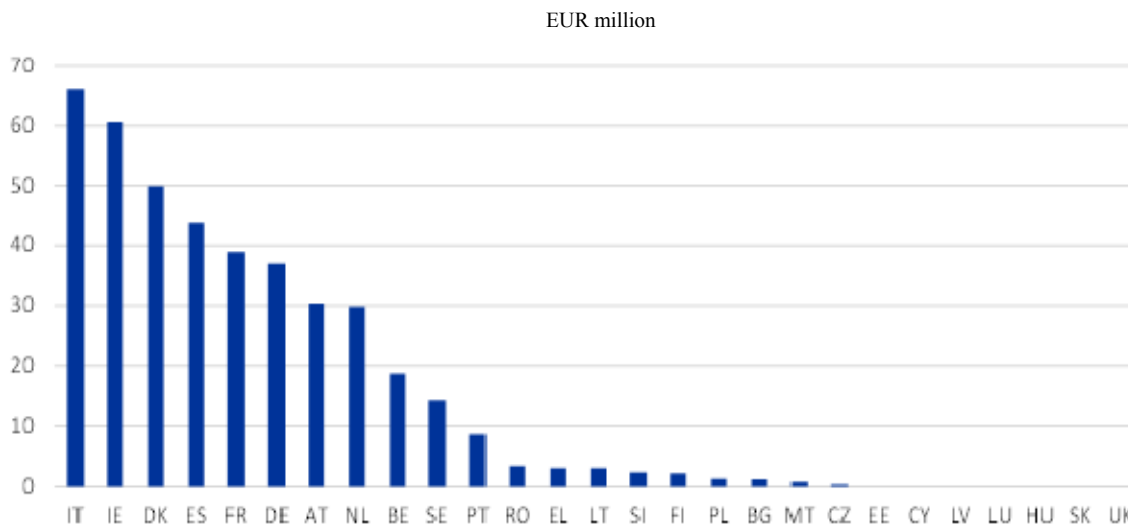


	2007	2008	2009	2010	2011	Total
crisis-related	-----	-----	23	23	20	66
trade-related	8	5	6	6	6	31
Total	8	5	29	29	26	97
% of total	8.2%	5.2%	29.9%	29.9%	26.8%	100.0%

The 2009 amendment of the EGF Regulation with its temporary and permanent modifications had a visible impact on the number of applications received by the European Commission, showing a significant increase in applications from May 2009 onwards. Over the whole period 2007-2011, there were 31 trade-related applications and 66 crisis-related applications. About 80% of the applications received since May 2009 (when the amended EGF Regulation became applicable) were related to the global financial and economic crisis.

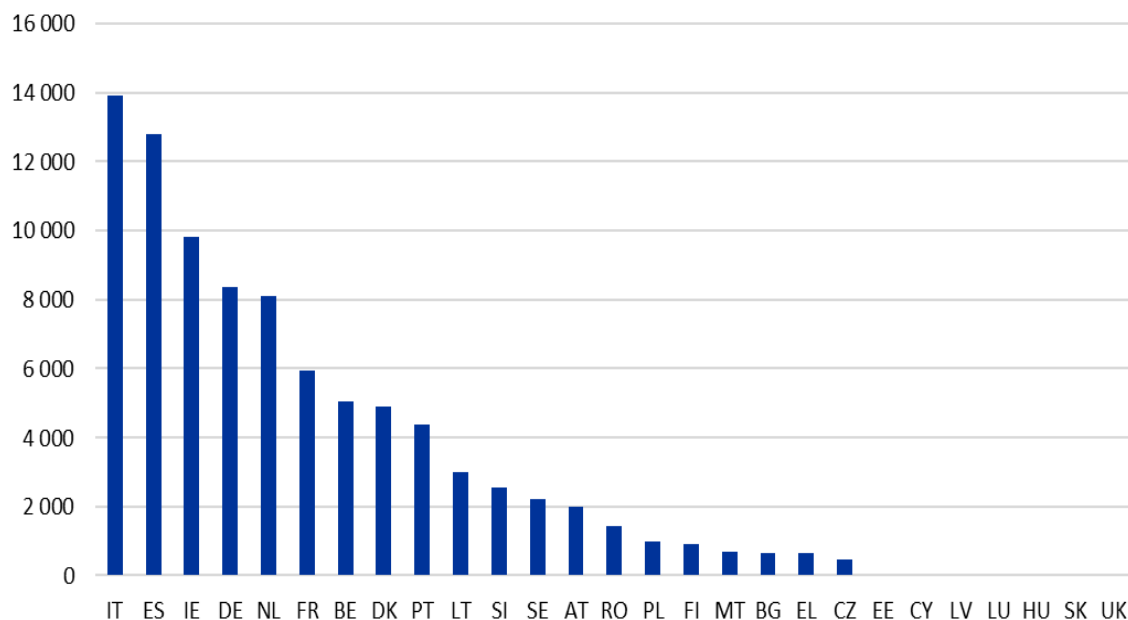
As shown in Annex 2, the Netherlands and Spain are the Member States which have submitted the highest number of applications for EGF funding (16 applications each), followed by Italy (12 applications) and Denmark (8 applications). Seven Member States had not yet applied for EGF support by 31.12.2011: Estonia, Cyprus, Latvia, Luxembourg, Hungary, Slovakia and the United Kingdom.

Graph 2: EGF amounts requested per Member State, 2007-2011



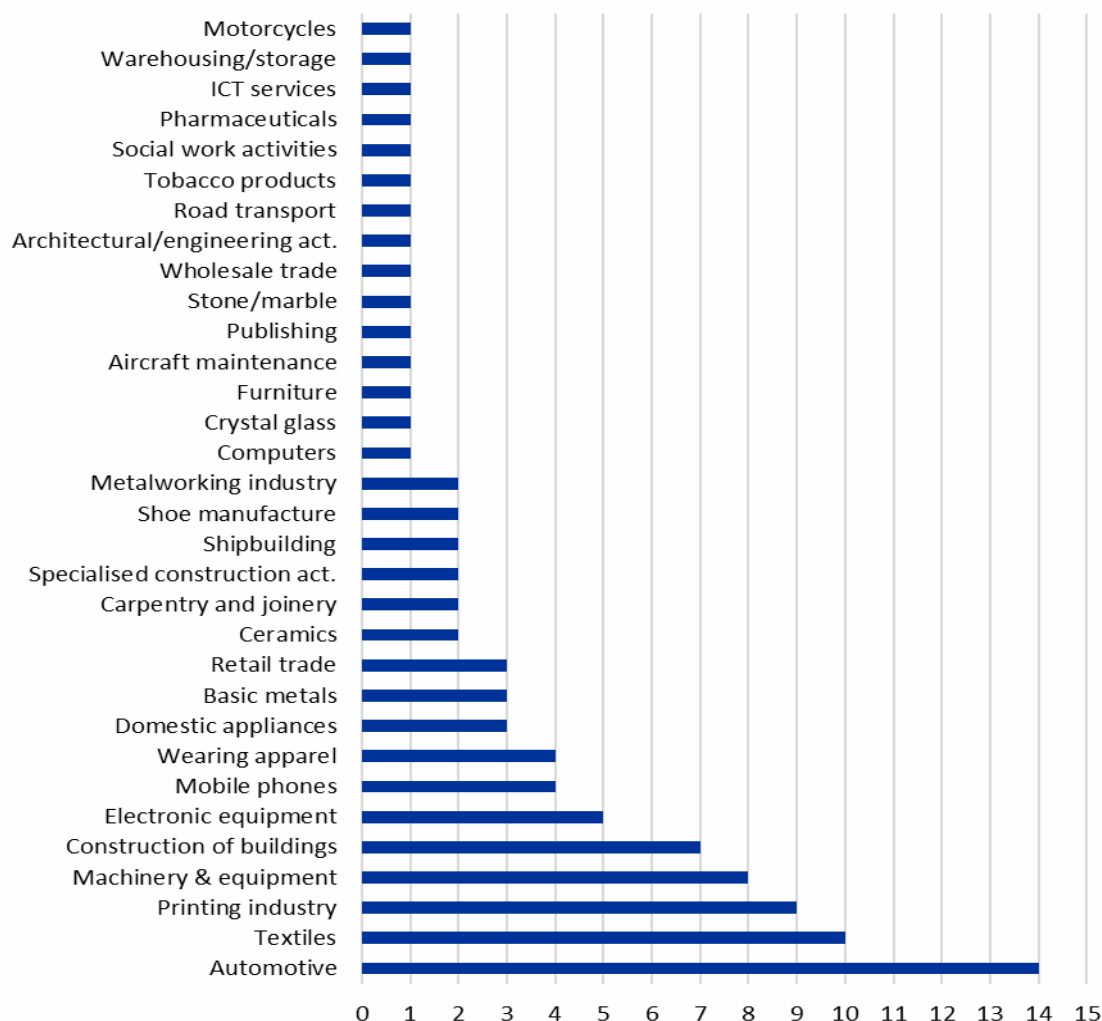
Over the whole period 2007-2011, a total amount of EUR 414.9 million was requested from the EGF by 20 Member States. Italy has requested the highest amount of co-funding from the EGF (EUR 66.2 million/12 applications) followed by Ireland (EUR 60.6 million/6 applications) and Denmark (EUR 49.9 million/8 applications). Amounts not yet approved are indicative, as they may still change during the assessment phase.

Graph 3: Number of targeted workers per Member State, 2007-2011



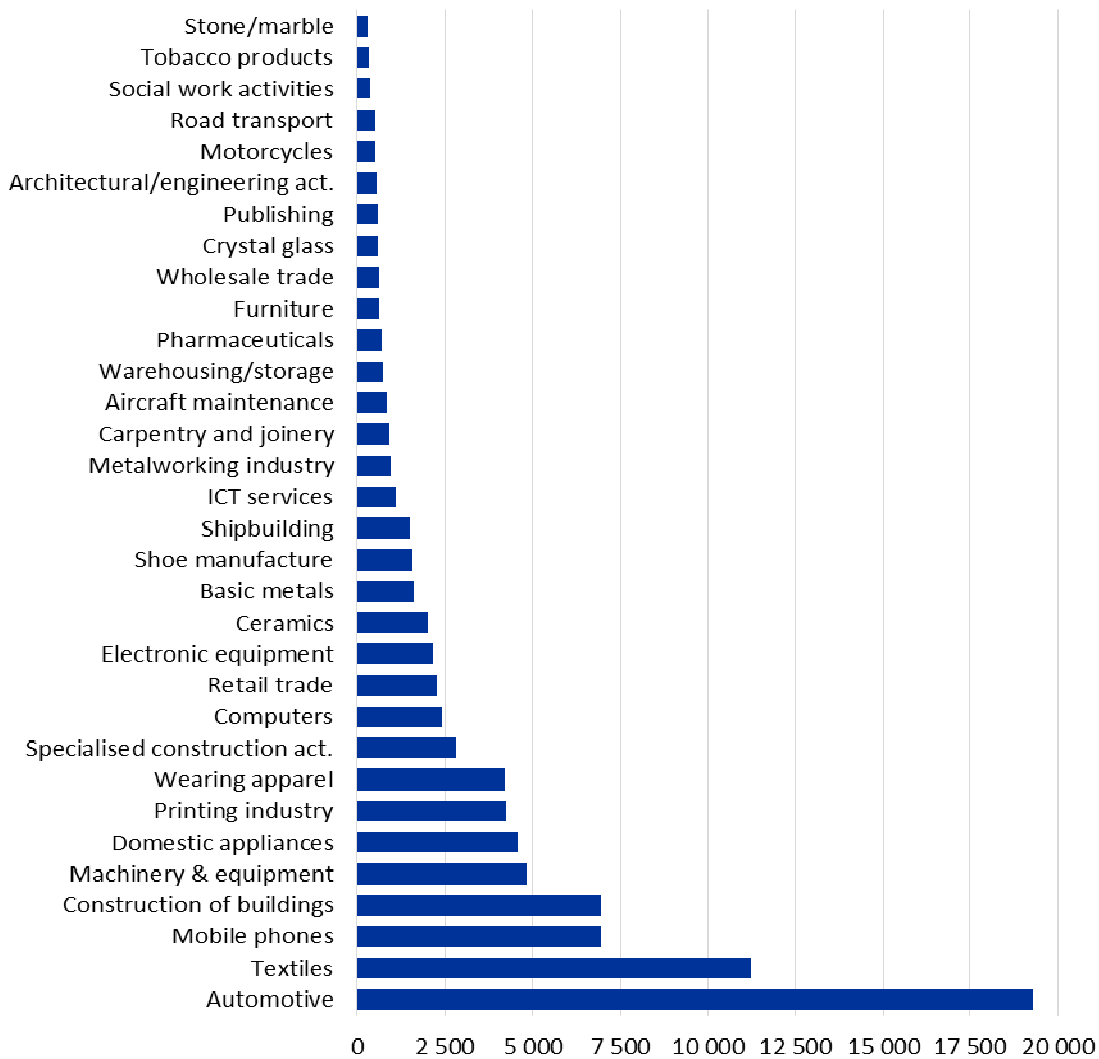
Italy is the Member State that has requested EGF assistance for the greatest number of dismissed workers (13 910/12 applications), followed by Spain (12 806/16 applications) and Ireland (9 835/6 applications). In 11 other countries, the number ranges from just over 8 000 in Germany to just over 1 400 in Romania. In each of the remaining six Member States which submitted applications, the number of workers involved was less than 1 000.

Graph 4: Number of applications by sector (NACE Rev. 2), 2007-2011



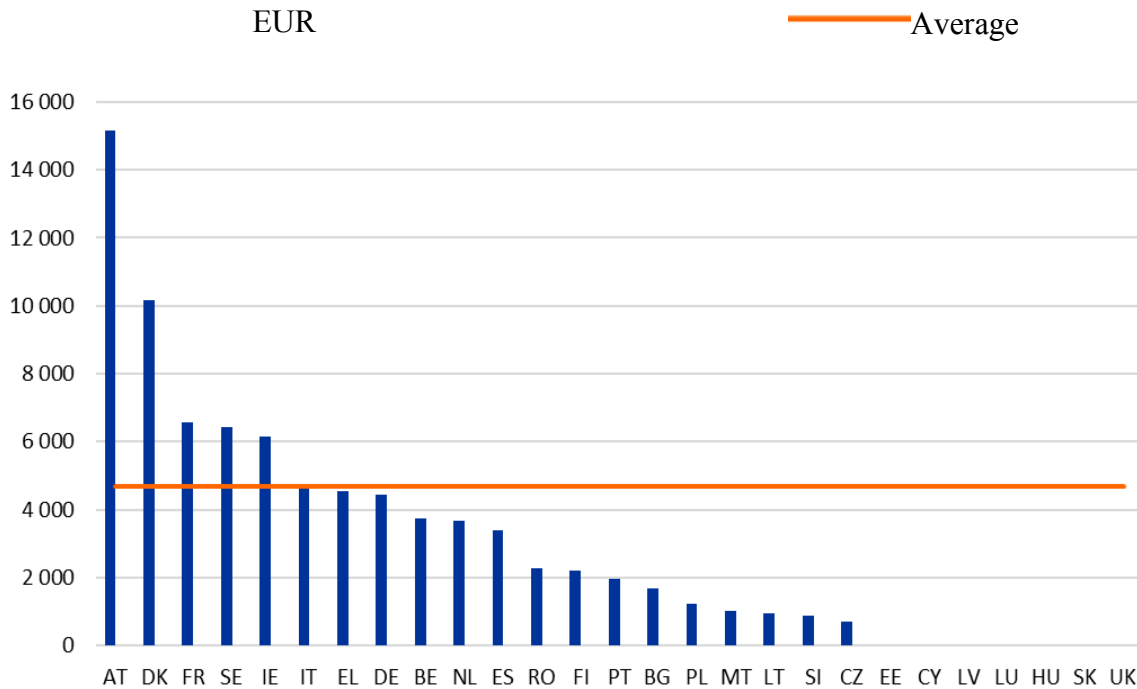
Over the 2007-2011 period, the EGF received applications from a total of 32 sectors of activity (see Annex 1). The majority of these involved manufacturing industries, but also included construction and services. Four manufacturing sectors were responsible for the largest number of applications: the automotive industry (14 applications or 14.4% of the total), followed by textiles (10 applications or 10.3% of the total), the printing industry, and the machinery and equipment sector (9 and 8 applications respectively or 8-9% each). Around 10% (10 applications) came from the construction industry broadly defined, covering the construction of buildings, specialised construction activities and architectural and engineering activities (this would go up to 14 applications or around 14% if ancillary sectors such as carpentry/joinery and ceramics were also included). For almost half of the sectors, the EGF received one single application.

Graph 5: Number of targeted workers per sector (NACE Rev. 2), 2007-2011



The sectors concerned are first and foremost the automotive sector, with more than 19 000 workers targeted (21.7% of the total in the submitted applications), followed by textiles (more than 11 000 targeted workers or 12.6% of the total in the submitted applications) and the building construction sector (almost 7 000 targeted workers or 7.8% of the total in the submitted applications).

Graph 6: Average EGF amount requested per targeted worker by Member State, 2007-2011



Graph 6 illustrates the average EGF support per targeted worker. EGF support per targeted worker was largest in Austria and Denmark at around EUR 15 000 and EUR 10 000, respectively. By contrast, in Lithuania, Slovenia and the Czech Republic, the support requested was less than EUR 1 000 per worker.

6. CONCLUSION

The trends evident so far show that EGF applications have been presented in a growing number of sectors, and by an increasing number of Member States. Member States have furthermore gained experience in selecting the most suitable measures, programming their assistance to redundant workers in an efficient manner, and making use of the EGF to test new approaches. They are also increasingly using the possibility to re-allocate funds between measures during project implementation in order to make full use of the available funds.

The fact that the EGF's temporary 'crisis derogation' has not been extended beyond the end of 2011 (failure to achieve a qualified majority in the Council as eight countries voted against) has limited the possibilities for EU assistance to workers who are still greatly affected by the economic and financial crisis.

From 2012 until the end of the current programming period (end of 2013), the permanent changes in the amended Regulation (threshold reduced to 500 redundancies, implementation period increased to 24 months from the date of application) will continue to apply, facilitating applications from Member States related to redundancies as a consequence of major structural changes in world trade patterns. If the full potential of the EGF is developed, in complementarity with other available instruments and in consultation with the major stakeholders, dismissed workers who are eligible for EGF support can be helped in a tailor-made and personalised manner, thereby improving their opportunities in the labour market in the medium and longer term as markets gradually recover from the crisis.

**ANNEX 1 — EGF APPLICATIONS BY CLASSIFICATION OF ECONOMIC ACTIVITIES UP TO
31 DECEMBER 2011 (97 APPLICATIONS)**

Automotive (NACE: Manufacture of motor vehicles, trailers and semi-trailers, division 29)		
No	MS	Case
EGF/2007/001	FR	Peugeot
EGF/2007/010	PT	Lisboa-Alentejo
EGF/2008/002	ES	Delphi
EGF/2008/004	ES	Castilla Leon
EGF/2009/007	SE	Volvo
EGF/2009/009	AT	Steiermark
EGF/2009/013	DE	Karmann
EGF/2009/019	FR	Renault
EGF/2010/002	ES	Cataluña
EGF/2010/004	PL	Wielkopolskie
EGF/2010/015	FR	Peugeot
EGF/2010/031	BE	General Motors Belgium
EGF/2011/003	DE	Arnsberg-Düsseldorf
EGF/2011/005	PT	Norte-Centro
Textiles (NACE: Manufacture of textiles, division 13)		
No	MS	Case
EGF/2007/005	IT	Sardegna
EGF/2007/006	IT	Piemonte
EGF/2007/007	IT	Lombardia
EGF/2008/001	IT	Toscana
EGF/2008/003	LT	Alytaus tekstilė
EGF/2008/005	ES	Catalonia
EGF/2009/001	PT	North/Centre
EGF/2009/004	BE	Oost-West Vlaanderen
EGF/2009/005	BE	Limburg
EGF/2010/009	ES	Valencia
Wearing apparel (NACE: Manufacture of wearing apparel, division 14)		
No	MS	Case
EGF/2007/008	MT	Textiles
EGF/2009/018	LT	Wearing apparel
EGF/2010/003	ES	Galicia
EGF/2010/014	SI	Mura
Printing industry (NACE: Printing and reproduction of recorded media, division 18)		
No	MS	Case
EGF/2009/026	NL	Noord Holland and Utrecht
EGF/2009/027	NL	Noord Brabant and Zuid Holland
EGF/2009/028	NL	Limburg
EGF/2009/029	NL	Gelderland and Overijssel
EGF/2009/030	NL	Drenthe
EGF/2010/027	NL	N Brabant Div 18
EGF/2010/028	NL	Overijssel Div 18
EGF/2010/029	NL	Z Holland/Utrecht Div 18
EGF/2010/030	NL	N Holland/Flevoland Div 18

Machinery and equipment (NACE: Manufacture of machinery and equipment n.e.c., division 28)		
No	MS	Case
EGF/2009/015	DK	Danfoss Group
EGF/2009/031	DK	Linak
EGF/2010/001	DK	Nordjylland
EGF/2010/006	PL	H.Cegielski-Poznań
EGF/2010/013	PL	Podkarpackie
EGF/2010/017	DK	Midtjylland machinery
EGF/2010/018	DE	Heidelberger Druckmaschinen
EGF/2010/022	DK	LM Glasfiber
Construction of buildings (NACE: Construction of buildings, division 41)		
No	MS	Case
EGF/2009/011	NL	Heijmans
EGF/2009/017	LT	Construction
EGF/2010/019	IE	Construction 41
EGF/2011/002	IT	Trentino Alto Adige
EGF/2011/006	ES	Valencia
EGF/2011/009	NL	Gelderland
EGF/2011/017	ES	Aragon
Specialised construction activities (NACE: Specialised construction activities, division 43)		
No	MS	Case
EGF/2010/020	IE	Construction 43
EGF/2011/012	NL	Noord Brabant-Zuid Holland
Architectural and engineering activities (NACE: Architectural and engineering activities; technical testing and analysis, division 71)		
No	MS	Case
EGF/2010/021	IE	Construction 71
Electronic equipment (NACE: Manufacture of computer, electronic and optical products, division 26)		
No	MS	Case
EGF/2009/023	PT	Qimonda
EGF/2010/008	AT	AT&S
EGF/2010/011	NL	NXP Semiconductors
EGF/2011/013	DK	Flextronics
EGF/2011/025	IT	Lombardia
Mobile phones (NACE: Manufacture of computer, electronic and optical products, division 26)		
No	MS	Case
EGF/2007/003	DE	BenQ
EGF/2007/004	FI	Perlos
EGF/2009/002	DE	Nokia
EGF/2011/014	RO	Nokia
Computers (NACE: Manufacture of computer, electronic and optical products, division 26)		
No	MS	Case
EGF/2009/008	IE	Dell

Basic metals (NACE: Manufacture of basic metals, division 24)		
No	MS	Case
EGF/2009/022	BG	Kremikovtzi AD (<i>not eligible</i>)
EGF/2010/007	AT	Steiermark-Niederösterreich
EGF/2011/021	NL	Zalco
Domestic appliances (NACE: Manufacture of electrical equipment, division 27)		
No	MS	Case
EGF/2009/006	IT	Gruppo Merloni
EGF/2009/010	LT	AB Snaige
EGF/2011/023	IT	Antonio Merloni
Retail trade (NACE: Retail trade, except of motor vehicles and motorcycles, division 47)		
No	MS	Case
EGF/2010/010	CZ	Unilever
EGF/2010/016	ES	Aragon
EGF/2011/004	EL	Aldi Hellas
Carpentry and joinery (NACE: Manufacture of wood and product of wood and cork, except furniture, division 16)		
No	MS	Case
EGF/2009/020	ES	Castilla La Mancha
EGF/2011/022	ES	Castilla y León-Castilla-La Mancha
Shipbuilding (NACE: Manufacture of other transport equipment, division 30)		
No	MS	Case
EGF/2010/025	DK	Odense Steel Shipyard
EGF/2011/008	DK	Odense Steel Shipyard
Motorcycles (NACE: Manufacture of other transport equipment, division 30)		
No	MS	Case
EGF/2011/026	IT	Emilia Romagna
Metalworking industry (NACE: Manufacture of fabricated metal products, except machinery and equipment, division 25)		
No	MS	Case
EGF/2011/018	ES	País Vasco
EGF/2011/019	ES	Galicia
Shoe manufacture (NACE: Manufacture of leather and related products, division 15)		
No	MS	Case
EGF/2010/026	PT	Rohde
EGF/2011/020	ES	Valencia
Wholesale trade (NACE: Wholesale trade, division 46)		
No	MS	Case
EGF/2010/012	NL	Noord Holland ICT
Aircraft maintenance (NACE: Repair and installation of machinery and equipment, division 33)		
No	MS	Case
EGF/2009/021	IE	SR Technics
Publishing (NACE: Publishing activities, division 58)		
No	MS	Case
EGF/2009/024	NL	Noord Holland and Zuid Holland
Furniture (NACE: Manufacture of furniture, division 31)		
No	MS	Case
EGF/2009/016	LT	Furniture

Ceramics (NACE: Manufacture of other non-metallic mineral products, division 23)																										
No	MS	Case																								
EGF/2009/014	ES	Valencia																								
EGF/2011/007	IT	Lazio																								
Crystal glass (NACE: Manufacture of other non-metallic mineral products, division 23)																										
No	MS	Case																								
EGF/2009/012	IE	Waterford Crystal																								
Stone/Marble (NACE: Manufacture of other non-metallic mineral products, division 23)																										
No	MS	Case																								
EGF/2010/005	ES	Valencia																								
Road transport (NACE: Land transport and transport via pipelines, division 49)																										
No	MS	Case																								
EGF/2011/001	AT	Nieder- und Oberösterreich																								
Tobacco products (NACE: Manufacture of tobacco products, division 12)																										
No	MS	Case																								
EGF/2011/010	AT	Austria Tabak																								
Social work activities (NACE: Social work activities without accommodation, division 88)																										
No	MS	Case																								
EGF/2011/011	AT	Soziale Dienstleistungen																								
Pharmaceuticals (NACE: Manufacture of basic pharmaceutical products and pharmaceutical preparations, division 21)																										
No	MS	Case																								
EGF/2011/015	SE	AstraZeneca																								
ICT services (NACE: Computer programming, consultancy and related activities, division 62)																										
No	MS	Case																								
EGF/2011/016	ES	Agile																								
Warehousing and storage (NACE: Warehousing and support activities for transportation, division 52)																										
No	MS	Case																								
EGF/2011/24	IT	Medcenter																								
<p>total number of applications: 97 total number of industrial sectors: 32</p> <p>in the above list, the following eight NACE sub-sectors are counted as separate sectors:</p> <p style="padding-left: 40px;">computer, mobile phones, electronic equipment (Nace 26)</p> <p style="padding-left: 40px;">shipbuilding, motorcycles (Nace 30)</p> <p style="padding-left: 40px;">ceramics, crystal glass, stone/marble (Nace 23)</p> <p>*) <i>the following six cases were withdrawn by the Member States (as at 31/12/2011) and are not included in the list:</i></p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td><i>EGF/2007/002</i></td> <td><i>FR</i></td> <td><i>Renault</i></td> <td><i>(withdrawn in July 2009)</i></td> </tr> <tr> <td><i>EGF/2007/009</i></td> <td><i>ES</i></td> <td><i>Delphi</i></td> <td><i>(withdrawn in 2007)</i></td> </tr> <tr> <td><i>EGF/2009/003</i></td> <td><i>AT</i></td> <td><i>Magna Steyr</i></td> <td><i>(withdrawn in 2009)</i></td> </tr> <tr> <td><i>EGF/2009/025</i></td> <td><i>NL</i></td> <td><i>Noord Brabant</i></td> <td><i>(withdrawn in April 2010)</i></td> </tr> <tr> <td><i>EGF/2010/023</i></td> <td><i>ES</i></td> <td><i>Lear</i></td> <td><i>(withdrawn in July 2011)</i></td> </tr> <tr> <td><i>EGF/2010/024</i></td> <td><i>NL</i></td> <td><i>ABN Amrobank</i></td> <td><i>(withdrawn in March 2011)</i></td> </tr> </table>			<i>EGF/2007/002</i>	<i>FR</i>	<i>Renault</i>	<i>(withdrawn in July 2009)</i>	<i>EGF/2007/009</i>	<i>ES</i>	<i>Delphi</i>	<i>(withdrawn in 2007)</i>	<i>EGF/2009/003</i>	<i>AT</i>	<i>Magna Steyr</i>	<i>(withdrawn in 2009)</i>	<i>EGF/2009/025</i>	<i>NL</i>	<i>Noord Brabant</i>	<i>(withdrawn in April 2010)</i>	<i>EGF/2010/023</i>	<i>ES</i>	<i>Lear</i>	<i>(withdrawn in July 2011)</i>	<i>EGF/2010/024</i>	<i>NL</i>	<i>ABN Amrobank</i>	<i>(withdrawn in March 2011)</i>
<i>EGF/2007/002</i>	<i>FR</i>	<i>Renault</i>	<i>(withdrawn in July 2009)</i>																							
<i>EGF/2007/009</i>	<i>ES</i>	<i>Delphi</i>	<i>(withdrawn in 2007)</i>																							
<i>EGF/2009/003</i>	<i>AT</i>	<i>Magna Steyr</i>	<i>(withdrawn in 2009)</i>																							
<i>EGF/2009/025</i>	<i>NL</i>	<i>Noord Brabant</i>	<i>(withdrawn in April 2010)</i>																							
<i>EGF/2010/023</i>	<i>ES</i>	<i>Lear</i>	<i>(withdrawn in July 2011)</i>																							
<i>EGF/2010/024</i>	<i>NL</i>	<i>ABN Amrobank</i>	<i>(withdrawn in March 2011)</i>																							

ANNEX 2 — OVERVIEW OF EGF APPLICATIONS UP TO 31 DECEMBER 2011 BY MEMBER STATE AND APPLICATION TYPE (ARTICLE 1 CRITERIA)

Member State	Art.1	2007	2008	2009	2010	2011	Number of applications	Workers targeted	Requested EGF contribution
BE	crisis				1		1	2 834	9.6
	trade						2	5 033	18.8
BG	crisis			1			1	643	1.1
	trade							0	0.0
CZ	crisis				1		1	460	0.3
	trade							0	0.0
DK	crisis			2	2	1	5	3 600	38.3
	trade				2	1	3	4 903	49.9
DE	crisis				1	1	2	1 959	12.7
	trade	1		2			3	8 371	37.2
IE	crisis			3	3		6	9 835	60.6
	trade							0	0.0
EL	crisis					1	1	642	2.9
	trade							0	0.0
ES	crisis			2	3	5	1	7 803	21.7
	trade		3		2	1	6	12 806	43.7
FR	crisis			1	1		2	5 671	36.4
	trade	1					1	5 938	39.0
IT	crisis					6	6	4 866	17.7
	trade	3	1	1		1	6	13 910	66.2
LT	crisis			4			4	2 413	2.6
	trade		1				1	3 013	2.9
MT	crisis							0	0.0
	trade	1					1	675	0.7
NL	crisis			7	5	3	15	7 586	28.0
	trade				1		1	8 098	29.9
AT	crisis			1	1	2	4	1 608	24.5
	trade				1	1	2	2 002	30.4
PL	crisis				3		3	979	1.2
	trade							0	0.0
PT	crisis			1	1	1	3	2 245	5.4
	trade	1		1			2	4 367	8.6
RO	crisis							0	0.0
	trade					1	1	1 416	3.2
SI	crisis				1		1	2 554	2.2
	trade							0	0.0
FI	crisis							0	0.0
	trade	1					1	915	2.0
SE	crisis			1			1	1 500	9.8
	trade					1	1	2 200	14.2
Total 20 MS	crisis	0	0	23	23	20	66	57 198	275.0
	trade	8	5	6	6	6	31	31 562	414.9

- 1) The table reflects modifications on 31.12.2011.
- 2) A temporary derogation extending the scope of the EGF to the global financial and economic crisis and increasing the EGF co-financing to 65 % of total costs applied to all applications received from 1 May 2009 up to 30 December 2011 (Regulation (EC) No 546/2009 amending Regulation (EC) No 1927/2006 (OJ L 167, 29.06.2009).
- 3) One of the submitted applications (EGF/2009/022 BG/Kremikovtsi) was non-eligible (SEC(2010) 993 final of 30.8.2010).
- 4) Six cases withdrawn by the applicant Member States are not included in the statistics.
- 5) Seven Member States had not yet applied for EGF support by 31.12.2011: Estonia, Cyprus, Latvia, Luxembourg, Hungary, Slovakia and the United Kingdom.