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**COMMISSION STAFF WORKING DOCUMENT**  
**EVALUATION**

**European Social Fund Plus mid-term evaluation**

{SWD(2025) 392 final}

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## Glossary

<i>Term or acronym</i>	<i>Meaning or definition</i>
ALMA	Aim, Learn, Master, Achieve
AMIF	Asylum, Migration and Integration Fund
AWP	Annual Work Programme
BMVI	Border Management and Visa Policy Instrument
CAP	Common Agricultural Policy
CARE	Cohesion's Action for Refugees in Europe
CCSI	Competence Centre for Social Innovation
CERV	Citizens, Equality, Rights and Values Programme
CF	Cohesion Fund
CIE	Counterfactual impact evaluation
CLLD	Community-led local development
CoE	Council of Europe
CoPs	Communities of practice
CP	Cohesion Policy
CPR	Common Provisions Regulation
CRII	Coronavirus Response Investment Initiative
CRIE Plus	Coronavirus Response Investment Initiative Plus
CSO	Civil society organisation
CSR	Country-specific recommendation
DG	Directorate-General
DG EMPL	Directorate-General for Employment, Social Affairs and Inclusion

DM	Direct management
DSC	Data Support Centre
EAFRD	European Agricultural Fund for Rural Development
EaSI (programme)	EU programme for Employment and Social Innovation
EaSI (strand)	Employment and Social Innovation of the ESF+
EC	European Commission
EGF	European Globalisation Fund
ELA	European Labour Authority
EMFAF	European Maritime, Fisheries and Aquaculture Fund
EPSR	European Pillar of Social Rights
ERDF	European Regional Development Fund
ESF	European Social Fund
ESF+	European Social Fund Plus
ESFA	European Social Fund Agency
ESI Funds	European Structural and Investment Funds
eSINNIS	Social Innovation Information System
ESCO	European Skills, Competences, Qualifications and Occupations
EU	European Union
EURES	European Employment Services
FEAD	Fund for European Aid to the Most Deprived
FG	Focus group
FINAP	IT tool used by DG EMPL to program its financial activities under direct and indirect management modes.
FNLC	Financing not linked to costs
GDP	Gross domestic product

ILO	International Labour Organization
ISCED	International Standard Classification of Education
ISF	Internal Security Fund
IM	Indirect management
ISG	Interservice group
JTF	Just Transition Fund
JRC	Joint Research Centre
KPI	Key performance indicator
LFS	Labour force survey
LTC	Long-term care
MA	Managing authority
MFF	Multiannual Financial Framework
MSs	Member States
NCC	National Competence Centre for Social Innovation
NCP	National Contact Point
NEET	Not in employment, education or training
NGO	Non-governmental organisation
NRRP	National Recovery and Resilience Plan
OECD	Organisation for Economic Co-operation and Development
OP	Operational Programme
PA	Partnership Agreement
PPI	Primary performance indicator
PROGRESS	Programme for Employment and Social Solidarity
REACT-EU	Recovery assistance for cohesion and the territories of Europe

RRF	Recovery and Resilience Facility
RSB	Regulatory Scrutiny Board
SCOs	Simplified cost options
SFC	System for Fund Management in the European Union
SIM	Social Innovation Match Database
SIP	Secondary Input Performance Indicator
SM	Shared management
SO	Specific objective
SWD	Staff Working Document
TFEU	Treaty on the Functioning of the European Union
TMS	Targeted Mobility Scheme
TWG	Technical Working Group
UN	United Nations
WHO	World Health Organisation
YEI	Youth Employment Initiative

### EU-27 country glossary

<i>Acronym</i>	<i>Country</i>
AT	Austria
BE	Belgium
BG	Bulgaria
CY	Cyprus

CZ	Czechia
DE	Germany
DK	Denmark
EE	Estonia
EL	Greece
ES	Spain
FI	Finland
FR	France
HR	Croatia
HU	Hungary
IE	Ireland
IT	Italy
LT	Lithuania
LU	Luxembourg
LV	Latvia
MT	Malta
NL	Netherlands
PL	Poland
PT	Portugal
RO	Romania
SE	Sweden
SI	Slovenia
SK	Slovakia

## 1. INTRODUCTION

### 1.1. European Social Fund Plus

The European Social Fund Plus (ESF+) is the European Union (EU)'s main instrument for investing in people and supporting the implementation of the European Pillar of Social Rights (EPSR). With an EU budget allocation of some EUR 95 billion for the period 2021-2027, the ESF+ continues providing an important contribution to the EU's employment, social, education and skills policies, including structural reforms in these areas.

The ESF+ brings together four funding instruments that were separate in the 2014-2020 programming period: the European Social Fund (ESF), the Fund for European Aid to the most Deprived (FEAD), the Youth Employment Initiative (YEI) and most of the European Programme for Employment and Social Innovation (EaSI)<sup>1</sup>. The type of support the FEAD had provided is integrated in the ESF+ specific objectives 'social inclusion of the most deprived' and 'combatting material deprivation'. The aim of the YEI is pursued by the thematic concentration on youth employment. The EaSI strand pursues the support to evidence-based policy-making and social experimentation, to job mobility and support activities as well as capacity building related to the use of micro-credit facilities under InvestEU (bringing together the multitude of earlier EU financial instruments, including those previously undertaken by the EaSI programme under its Microfinance and Social Entrepreneurship axis).

As specified in Article 3 of Regulation (EU) 2021/1057<sup>2</sup> (ESF+ Regulation), ESF+ is implemented under:

- **Shared management:** for the part of the assistance which corresponds to the Specific Objectives set out in Article 4(1) of the ESF+ regulation. The ESF+ Regulation refers to this strand as the ESF+ strand under shared management<sup>3</sup>. Its budget of EUR 95.1 billion (EUR 142 billion with national co-financing) is programmed and implemented in partnership between the European Commission, national and regional authorities, social partners, and other stakeholders. The shared-management strand is a part of the EU cohesion policy. Similarly to the past, the ESF+ shared management strand continues to be regulated by the

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<sup>1</sup>Many of the former stand-alone programme EaSI provisions were preserved, however, the financial instruments for microfinance and social enterprises implemented under the former EaSI were deployed under the [InvestEU Fund](#), while the EURES (European Employment Services) network coordination office function was transferred to the [European Labour Authority](#) (ELA) established in 2019. Link to the Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021 establishing the European Social Fund Plus (ESF+): <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R1057>.

<sup>2</sup>Regulation (EU) 2021/1057 available at:

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R1057&from=EN>

<sup>3</sup>This strand corresponds broadly to the objectives previously addressed in the 2014-2020 programming period by ESF, YEI and FEAD.

Common Provisions Regulation (CPR)<sup>4,5</sup>, the fund specific ESF+ regulation and a limited number of implementing acts.

- **Direct and indirect management:** for the part of the assistance which corresponds to the specific objectives set out in Article 4(1) and operational objectives Article 25 of the ESF+ regulation. The ESF+ regulation refers to the direct/indirect management strand as the EaSI strand. Its budget is EUR 762 million<sup>6</sup>. Under direct management mode, the European Commission launches calls for proposals to award grants to projects as well as calls for tenders to award service and/or supply contracts. International organisations (mainly OECD, ILO, CoE and WHO) implement a small part of the programme under indirect management. In addition, EUR 132 million<sup>7</sup> are implemented under indirect management mode to support transnational cooperation to accelerate the transfer and facilitate the scaling up of innovative solutions (the ESF Social Innovation Plus Initiative). The entity entrusted by the Commission to implement this initiative is the European Social Fund Agency in Lithuania (hereafter called ‘ESFA’)<sup>8</sup>. From 2025 ESFA will handle both direct and indirect management calls, making it easier to shift validated experiments into large-scale solutions.

## 1.2. Purpose and scope of the evaluation

Article 45(1) of the CPR stipulates that the “Commission shall carry out a mid-term evaluation to examine the effectiveness, efficiency, relevance, coherence and Union added value of each Fund by the end of 2024.” A similar requirement to carry out the mid-term evaluation of the EaSI strand is established in Article 34(2) of the ESF+ Regulation.

This evaluation covers both ESF+ strands and the period from the entry into force of the Regulations, i.e. from 24 June 2021 till the end of 2024. It aims to inform the work on the design of the future EU instrument investing in human capital as well as to identify lessons learnt which can be still used to improve the implementation of the ESF+ in 2021-2027

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<sup>4</sup>Regulation (EU) 2021/1060 available at: [Regulation - 2021/1060 - EN - EUR-Lex \(europa.eu\)](https://eur-lex.europa.eu/eli/reg/2021/1060/oj).

<sup>5</sup>The CPR is not applicable to the EaSI strand.

<sup>6</sup>An amount of EUR 676 million (in 2018 prices), corresponding to the part of the financial envelope for the implementation of the EaSI strand, was envisaged in the ESF+ Regulation for the period 2021 to 2027 in line with Article 5.3 of the ESF+ Regulation. This amount corresponds to EUR 762 million in current prices.

<sup>7</sup>An amount of EUR 175 million (in 2018 prices) was envisaged for the transnational cooperation to accelerate the transfer and facilitate the scaling up of innovative solutions as referred to in Article 25(i) of the ESF+ Regulation, coming from the financial envelope for the implementation of the ESF+ strand under shared management. Following the annual budgetary procedures as well as the MFF mid-term review, the budgetary authority has updated in 2024 the amount mentioned above and allocated a total budget of EUR 132 million from the shared management envelope in line with Article 5.2 of the ESF+ Regulation for the EaSI strand objective of ‘transnational cooperation to accelerate the transfer and facilitate the scaling up of innovative solutions’. The exact amounts are determined annually through the EaSI strand financing decisions and annual work programmes.

<sup>8</sup>Following a call for expression of interest open uniquely to managing authorities and implementing bodies, the Lithuanian managing authority was selected to implement transnational cooperation to accelerate the transfer and facilitate the scaling-up of innovative solutions, branded as the ESF+ Social Innovation Plus Initiative. To this end, it established a ‘Social Innovations and Transnational Initiatives Division’, which is known as the European Social Fund Agency (ESFA). See <https://european-social-fund-plus.ec.europa.eu/en/selection-entrusted-entity-indirect-management-initiative-esf-social-innovation>.

programming period. The geographical scope includes all EU Member States, and for the EaSI strand, also participating third countries (Norway, Iceland, Montenegro, Serbia, and Moldova)<sup>9</sup>. The resources of ESF+ shared management strand are allocated, in line with Article 108 of the CPR, to three categories of regions (less developed, transition and more developed) which are defined based on the region's GDP per capita (see also footnote 39). These categories determine the maximum co-financing rates that can be applied to the priorities in the ESF+ programmes. Outermost regions can benefit from the same maximum co-financing rate as the less developed regions, as well as from additional allocation<sup>10</sup>. Categories of regions do not apply to financing under EaSI strand which is not covered by CPR.

Due to the Covid-19 crisis and its following initiatives, including changes to the Cohesion Policy regulations and the creation of the Recovery and Resilience Facility<sup>11</sup> (RRF), the implementation of the ESF+ shared management strand started effectively only in 2023. Member States focused on concluding the 2014-2020 programmes which included an additional EUR 50 billion of REACT-EU<sup>12</sup> (Recovery assistance for cohesion and the territories of Europe) resources that had to be spent in three years, within the same spending deadline of 2023. They also prioritised the RRF having a much shorter implementation timeline. Moreover, the ESF+ Regulation and the CPR entered into force only in June 2021<sup>13</sup>. However, the Regulatory requirements to carry out a mid-term evaluation by the end of 2024 were formulated rigidly. In consequence, as analysed in Section 3 on the state of play, the implementation of the ESF+ shared management strand was not sufficiently advanced to ensure a meaningful assessment of effectiveness, efficiency and value added of the funds operations, whose results were yet to emerge. Similarly, although for the EaSI strand the implementation started already in the third quarter of 2021, most of the projects granted were still ongoing by the end of 2024 so that their results could not yet be analysed.

The ESF+ results and impacts will be fully assessed in the retrospective evaluations due in 2031. On the other hand, the expected impact of ESF+ shared management strand investments in skills and active labour market policies are analysed in Employment and Social Developments in Europe report<sup>14,15</sup>. Therefore, this mid-term evaluation focuses on the progress in the ESF+ implementation at the end of 2024, and on the criteria of coherence and relevance. Under the criteria of effectiveness and efficiency, given the above-mentioned constraints, it assesses the effects of changes introduced in the 2021-

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<sup>9</sup>State of play in September 2024 (see [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation-esf-socpl\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation-esf-socpl_en.pdf)).

<sup>10</sup>[Inforegio - Is my region covered?](#)

<sup>11</sup> Regulation (EU) 2021/241 of the European Parliament and of the Council of 12 February 2021 establishing the Recovery and Resilience Facility: [Regulation - 2021/241 - EN - rrf - EUR-Lex \(europa.eu\)](#).

<sup>12</sup> Regulation (EU) 2020/2221 on REACT-EU: [Regulation - 2020/2221 - EN - EUR-Lex \(europa.eu\)](#).

<sup>13</sup>The Commission initial proposal was adopted in May 2018.

<sup>14</sup>Employment and Social Developments in Europe 2024.

[Publications catalogue - Employment, Social Affairs & Inclusion - European Commission \(europa.eu\)](#).

<sup>15</sup>The Rhomolo model simulations show that ESF+ funding for skills, in addition to the direct employment and social benefits expected in the areas and sectors targeted by the projects financed, could increase EU GDP by up to 0.039% at its peak in 2036 relative to baseline GDP. The ESF+ investments in ALMP (Active Labour Market Policies) are projected to raise economic activity in the long-term, increasing EU GDP by approximately 0.029% per year, even 20 years after the start of the programme. In both cases the benefits more than offset the initial investments.

2027 programming period to improve the fund's implementation and performance. A particular emphasis is put on the effects of the merger of four former funds (ESF, YEI, FEAD and EaSI) on the programming and implementation. Coherence between the ESF+ and other funding instruments with similar goals refers to the extent to which these instruments generate synergies and complementarities that enhance overall performance as compared to performance of each instrument separately. It also involves assessing whether there are any conflicting objectives, overlaps, or substitution<sup>16</sup>. Relevance is assessed in terms of correspondence between the fund's objectives and current and future needs, identified both at the European level (country-specific recommendations, European Pillar of Social Rights principles, new priorities) as well as national/regional/stakeholders' level. Under the criterion on EU added value, which looks at the results that go beyond what could be expected by individual actions of Member States, given the impossibility to make an assessment because of insufficient implementation at the moment of conducting the evaluation, the report refers to the existing evidence of value added of ESF and EaSI in the previous programming period(s).

### **1.3. Methodological framework and data limitations**

This Staff Working Document draws on evidence from the supporting study carried out by the consortium formed by Ecorys, Ismeri and 3s<sup>17</sup> which covers the period by end 2023. It included desk research as well as extensive stakeholder consultation (two surveys with managing authorities and EaSI strand stakeholders, 360 interviews at the EU, national and regional levels, two focus groups respectively for the shared management and the EaSI strand). Furthermore, evidence from EaSI performance monitoring report<sup>18</sup> and the results of EaSI Stakeholder Survey<sup>19</sup> fed into the Staff Working Document. In addition, relevant studies and internal analysis by DG EMPL were used, in particular updated data on expenditure, outputs and results in the shared management strand at the end of 2024.

No public consultation was carried out due to the technical nature of the evaluation questions, focusing mostly on the design of ESF+. During the targeted consultations, the questions were formulated in a non-technical language to reach out to ESF+ beneficiaries and organisations representing the participants/end recipients. During the consultations, a high level of evaluation fatigue was observed among the stakeholders, caused by the considerable number of evaluation exercises running in parallel at the EU and national level. Nevertheless, the study managed to gather the views from a substantial number of

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<sup>16</sup>Even though there are slight differences between substitution and displacement effects, for the purpose of this SWD, these effects are treated as synonyms. The substitution effect refers to cases where the ESF is replaced in a particular intervention by another fund. This can occur when there are overlapping eligible activities.

<sup>17</sup>Ecorys, *Study supporting the mid-term evaluation of the ESF+ during the programming period 2021-2027*, 2025.

<sup>18</sup>European Commission: Directorate-General for Employment, Social Affairs and Inclusion, *EaSI performance in 2014 – Executive summary of EaSI performance monitoring report 2014*, Publications Office, 2015, <https://data.europa.eu/doi/10.2767/952588>

<sup>19</sup>The EaSI Stakeholder Survey is conducted biannually to collect the views of strand's beneficiaries as well as unsuccessful applicants, potential applicants, participants in events and/or stakeholders interested in the activities implemented by the strand. The first survey was disseminated in 2024 by email to 13 575 selected stakeholders (435 respondents submitted their replies). Two (2) other similar surveys will be launched to cover the entire programming period.

all relevant types of stakeholders and the results are considered robust (see [Annex II](#)).

The Staff Working Document, and particularly the sections on effectiveness of the merger of the former four funds, efficiency, coherence and relevance rely to a large extent on stakeholders' opinions. To corroborate the validity of the findings, the report uses stakeholders' opinions collected through various data collection methods. Opinions expressed only by a small number of stakeholders were treated with caution when formulating the conclusions. The findings of the evaluation are valid for the current state of play and might change when the implementation is more advanced, and more data is available.

Data from the monitoring systems are used to present the progress on implementation. However, at this stage they do not allow to present robust conclusions on the fund's effectiveness, efficiency and value added. As Member States' reporting on output and result indicators by the end of 2024 was not yet fully comprehensive, such conclusions would be biased<sup>20</sup>. They would reflect rather the different level of advancement of Member State in implementing their programmes, instead of contributing to assess the overall effectiveness, efficiency and value added of the shared management strand of ESF+.

## **2. WHAT WAS THE EXPECTED OUTCOME OF THE INTERVENTION?**

### **2.1. Description of the intervention and its objectives**

#### *Policy challenges*

The impact assessment of the ESF+<sup>21</sup> identified the following policy challenges to be responded by the fund:

- Constantly evolving technology, productivity and globalisation paradigms required constant upskilling and reskilling of the workforce to face the new digital and automation challenges and the changes in skills requirements due to the low-carbon and climate resilient transition.
- The trends related to demography, migration, technological change, work organisation and labour market were going to have a massive impact on education and training systems and skill needs. However, access to quality education, training and life-long learning opportunities across the EU was still unequal.
- Disparities and divergence across Member States were significant with unemployment rates and indicators pointing to substantial slack in some labour markets while tightening was evident in others. Unemployment and long-term unemployment remained among the most important challenges, and, despite improvements, too many young people struggled to find a (quality) job.
- 118 million people were still at risk of poverty in 2016 meaning that social inequalities remained an important concern.
- Long-term demographic trends (less working-age population, more senior workers

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<sup>20</sup> For a comprehensive overview of monitoring issues, see ESF+ Synthesis Report 2024 (forthcoming).

<sup>21</sup> Commission Staff Working Document SWD (2018) 289 final: [eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018SC0289](http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018SC0289).



programming and implementation tasks to the EU Member States and regions: contrary to the EaSI strand, these actions implement policies in scale. The subsidiarity principle also limits EU action to what is necessary to achieve its objectives as laid down in the Treaties. Shared management aims to ensure that decisions are taken as closely as possible to the citizen and that EU-level action is justified in light of the possibilities and specificities at national, regional or local level. Shared management brings Europe closer to its citizens and connects local needs with European objectives. Moreover, it increases ownership of EU objectives, as Member States and the Commission share decision-making power and responsibility. According to the 2017 report of the High-Level Expert Group monitoring simplification for beneficiaries of ESI Funds, a more centralised management mode would have been detrimental to the efficiency and effectiveness of investments<sup>23</sup>.

The EaSI strand, under direct management, focuses on projects with an innovative dimension in which there is clear EU added value, and on actions with transnational dimension, meaning that EU action is more effective than action taken at national, regional or local level to reach critical mass and reduce administrative burden<sup>24</sup>.

### *Intervention logic*

The ESF+ invests in human capital with a view to achieving its employment and social policy goals. The theory of change (see the detailed intervention logic in [Annex VIII](#)) postulates that the specific human capital investments, e.g. via active labour market policies, lifelong learning, or active inclusion policies, will increase human capital and improve its composition. This will increase labour supply and productivity, which in turn will increase economic output and employment, reduce poverty and inequalities. As the intervention logic's starting point is the investment in the individual participants, the programmes' results are measured at micro-economic level. For example, the shared management strand's common result indicators collected via the monitoring system include the number of participants who gain a qualification, move into employment or are in employment six months after the intervention. Provided that a certain part of the positive outcomes would have not materialised without ESF+ support (more on that below), higher results indicate a higher accumulation of human capital, which, according to the theory, leads to the desired economic outcomes.

Each step of the intervention logic corresponds to specific parts of the monitoring and evaluation framework of ESF+ (see [Table Y](#) in Annex VIII). Under shared management, the investments are monitored by financial indicators broken down by thematic policy fields (the specific objectives). The policies' outreach is depicted by output indicators (e.g. number of long-term unemployed or number of low-skilled participants). Result indicators describe the change in the participant's situation (e.g. how many moved to education or training or to employment).

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(Article 5 TFEU) or competence to carry out actions to support, coordinate or supplement the actions of the Member States (Article 6 TFEU).

<sup>23</sup>Final conclusions and recommendations of the High-Level Group on Simplification for post 2020 p. 7-9. [https://ec.europa.eu/regional\\_policy/sources/newsroom/simplification\\_proposals.pdf](https://ec.europa.eu/regional_policy/sources/newsroom/simplification_proposals.pdf).

<sup>24</sup>Explanatory Memorandum to the Commission Proposal for a Regulation of the European Parliament and of the Council on the European Social Fund Plus (ESF+) COM (2018) 382: [EUR-Lex - 52018PC0382 - EN - EUR-Lex](#)

This is also the case for the EaSI strand, where the performance framework includes six primary indicators (KPIs/PPIs) to report on the progress towards the achievement of the specific and operational objectives defined in the Regulation for this strand (see Section 4.1). This reporting is made in terms of outputs (for instance, number of calls for social experimentation or “activities”) or outcomes (e.g. number of job placements under targeted mobility schemes). These “units of measurement” are defined in the ESF+ Regulation. The targets associated to each primary indicator define the objectives to be reached at the end of the programming period (2021-2027). Thus, the coverage of operational objectives shall be taken on board already in the planning stage (programming phase) and before the approval of the Annual Work Programme. This approach was adopted to ease the monitoring, the subsequent mid-term and ex-post evaluations, and especially to help detect relevant dysfunctions on the execution affecting a concrete primary indicator (KPI/PPI) that could compromise the reaching of the final targets. In that case, corrective measures could be swiftly applied already in the programming phase. Secondary indicators were included in the Performance Framework to complement these KPIs/PPIs and to show a more complete picture of the funds’ performance, i.e. those related with the budget execution (input indicators) and indicators based on stakeholders’ opinions (using data from the EaSI strand stakeholders biannual survey).

Under shared management, the net contribution of the policies’ positive impact is estimated at the level of the individual, using counterfactual impact evaluations (CIEs) performed at national level, with support from the European Commission.<sup>25</sup> As far as labour market impacts are concerned, the results of CIEs are summarised via a meta-analysis (first edition in 2022<sup>26</sup>, regularly updated<sup>27,28</sup> since) that allows to compute average impacts across the EU. To estimate the ESF+’s macroeconomic effect, the Commission relies on JRC’s Rhomolo model. Also, econometric studies are used to estimate the impact of the cohesion funds on the macro-economic variables, but due to size of the ESF+ and complementarities with other cohesion funds, such studies are not done separately for the ESF+.

At this stage of implementation, firm evidence is available about the planned financing (inputs) and the main fields of intervention. That is used to evaluate the fund’s relevance by using thematic concentration and links to the country-specific recommendations (CSRs) as a main criterion. For the analysis on effectiveness and efficiency, due to incomplete data availability at this point in time, the evaluation relies on other data sources by looking at

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<sup>25</sup>DG EMPL, together with the JRC and DG REGIO, support work with the national authorities to improve evaluation capacity and culture, including capacity to conduct counterfactual impact evaluations. However, access to data poses a significant challenge. There is a lot of data available in administrative registers, such as employment registers or tax registers, which can be useful for evaluating policies financed by the ESF+.

<sup>26</sup> European Commission: Directorate-General for Employment, Social Affairs and Inclusion, Ismeri Europa, Pompili, M., Kluge, J., Jessen, J. et al., *Meta-analysis of the ESF counterfactual impact evaluations – Final report*, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2767/580759>

<sup>27</sup> Haepf, T. and Serrano Alarcon, M., *Meta-analysis of the European Social Fund counterfactual impact evaluations: Brief update with alternative measures*, European Commission, Ispra, 2024, JRC137571, <https://publications.jrc.ec.europa.eu/repository/handle/JRC137571>

<sup>28</sup> HAEPP, T., JESSEN, J., POMPILI, M. and SEEBAUER, J., *Meta-Analysis of ESF/YEI Counterfactual Impact Evaluations - A comprehensive update including new methodology*, Publications Office of the European Union, Luxembourg, 2025, <https://data.europa.eu/doi/10.2760/1873376>, JRC141819

the fund's design and processes. More quantitative analysis, e.g. findings from counterfactual evaluations and their meta-analysis and cost-benefit analysis will be carried out in the ex-post evaluation of the ESF+.

For the EaSI strand, given its limited scale in terms of budget and volume of activities (representing 1% of the ESF+ overall budget), the influence on the macro variables (e.g. GDP, employment rate, population at risk of poverty in the EU) is not realistically measurable. An indicator on the share of upscaled EaSI strand social experimentation projects can be used as a proxy for the expected impact of the support to policy reforms. A method to gauge the uptake of EaSI analytical activities is the citation analysis. While ordinarily used to measure the impact of scientific articles, this method was already applied to EaSI analytical outputs in the first monitoring report to reveal their importance within a specific collection of documents (e.g., political documents, scientific articles, news articles)<sup>29</sup>.

Other expected impacts are measured by quantitative indicators based on stakeholders perceptions (data collected through the EaSI strand biannual survey), for instance: “extent to which support services have helped in developing integrated European labour markets, increasing employment opportunities and facilitating mobility of workers”, “stakeholder perceptions of the impact of EaSI funded activities on policy designs”, “perceived extent of EaSI’s contributions to networking and capacity building”, etc. These indicators are already part of the Performance Framework but were not used within the scope of the mid-term evaluation due to the lack of data at this stage<sup>30</sup>. Additionally, the ex-post evaluation will benefit from the findings included in the EaSI strands’ monitoring reports covering 2021–2027 (including results from the three bi-annual EaSI Stakeholders Surveys), from an ongoing internal assessment of social experimentation projects, including their potential for upscaling (any project finished at the time of the current evaluation) and from other ongoing reports related to the social innovation.

### *Unintended effects*

The intervention logic describes how the ESF+ is expected to work and what are the expected outcomes, results and impacts. However, the ESF+ funded policies might also have unintended effects which are not part of the intervention logic. The unintended effects could be positive, such as increased positive attitudes towards the EU, increased civic engagement, positive peer effects or spillovers to non-targeted groups or regions. Also, collaboration among ESF+ stakeholders during ESF+ implementation might improve governance and policy coordination. ESF+ investments might also cause some unintended negative effects. Over-reliance on ESF+ funding may discourage national or regional governments from allocating sufficient domestic resources to social policies. There may also be crowding-out effects in the life-long learning markets, as ESF+ investments could reduce private investment in upskilling and reskilling. Existing inequalities might be reinforced if the investments disproportionately benefit advantaged groups.

Some of these unintended effects could be assessed during the programming period using a combination of surveys and statistical methods. However, certain unintended effects, such as the crowding-out of private investments in lifelong learning, may be difficult to

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<sup>29</sup>See the EaSI strand monitoring report, forthcoming in second quarter of 2025 (<https://op.europa.eu/en/>).

<sup>30</sup>This information is based on the EaSI Strand Stakeholders survey (the first survey covered 2021 - 2023).

evaluate. Since the ESF, together with its successor the ESF+, has been in place for several decades, it would be methodologically challenging to estimate the amount of private funding that would exist in their absence. DG EMPL will consider the possibility of identifying such effects, e.g. by studying regions that have experienced variations in receiving support from the shared management strand (for instance due to transitioning from one category of regions to another one).

#### *Implementation challenges: design features*

In addition to the policy challenges described in the beginning of the section, the ESF+ impact assessment also identified challenges related to the implementation of the funds investing in human capital:

- limited interaction and alignment between funds for human capital investment, a diversity of rules and limited synergies;
- funding framework not fully aligned with EU policy priorities and/or social policy needs as well as rigidities in implementation;
- complex requirements and high costs in management and delivery.

These challenges were addressed by changes in the funds' design and provisions compared to the previous programming period. In the previous programming period, limited interaction took place between ESF and the EaSI programme, leading to limited scaling up of EaSI projects through ESF<sup>31</sup>. Bringing the two funding instruments under one single legal basis, was therefore expected to improve the coherence and synergies, and in particular to support the transfer or upscaling under shared management strand of successful innovations experimented under direct/indirect management strand. Under the shared management strand, the ESF+ regulation established (in Article 14) the obligation for Member States to dedicate at least one priority to social innovation and social experimentation. This obligation has two (not mutually exclusive) options: promoting testing of innovative solutions or scaling up social innovations, particularly the ones tested under EU level programmes. This represents a significant change from the formulation used in the ESF Regulation<sup>32</sup> for 2014-2020 (Article 9), where no specific obligation was set out for Member States. This is expected to incentivise the Member States to strengthen the links between the shared management strand and the EaSI strand.

Furthermore, while the ESF Regulation for the 2014-2020 period envisaged a co-financing rate for social innovation actions between 60% to 95% depending on the region, the ESF+ Regulation for the 2021-2027 period established a maximum co-financing rate of 95%. These incentives are complemented with social innovation and social experimentation activities under the EaSI strand (grants, capacity building and support to upscaling). While

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<sup>31</sup>The main reason was the lack of concrete links between ESF and EaSI. While there was a provision for scaling up to take place via the ESF (Article 9 of the [ESF Regulation \(Regulation \(EU\) No 1304/2013 of the European Parliament and of the Council of 17 December 2013 on the European Social Fund and repealing Council Regulation \(EC\) No 1081/2006](#)), in practice, the managing authorities had limited awareness of EaSI outputs. This issue, identified in the [EaSI mid-term evaluation](#) and the ESF+ impact assessment, was confirmed by the *ex post* evaluation of EaSI programme ([Staff Working Document](#)).

<sup>32</sup> [Regulation \(EU\) No 1304/2013 of the European Parliament and of the Council of 17 December 2013 on the European Social Fund and repealing Council Regulation \(EC\) No 1081/2006](#)

direct management under EaSI strand targets early-stage social innovation (testing of new solutions), the Social Innovation Plus Initiative (indirect management mode) focuses on promoting their transfer and upscaling.

Figure 1 presents the ESF+ architecture to facilitate interactions and exchanges between strands in promoting social innovation.

**Figure 1 - ESF+ social innovation scheme**



Source: DG EMPL

The merging of ESF, YEI and FEAD under the umbrella of ESF+ aimed to further streamline and simplify the EU funding landscape, to ensure better synergies, strengthen strategic orientation and reduce red tape. A number of indicators measuring the success of the merger are used in the evaluation (see Table 1 below).

**Table 1 - Indicators of the success of the former ESF, YEI, FEAD and EaSI merger**

Merger	Expected effects	Indicators used
ESF shared management and EaSI	Scaling up of EaSI social experimentation projects under shared management	<ul style="list-style-type: none"> <li>• number of mentions of EaSI strand under the shared management programmes</li> <li>• number of EaSI projects scaled-up through shared management programmes</li> </ul>
ESF and FEAD	More complementarity between food/basic material support and other operations under ESF+ shared management strand  Simplification	<ul style="list-style-type: none"> <li>• number of Member States integrating specific objectives dedicated to most deprived (SO (l) and SO(m)) into broader programmes</li> <li>• number of Member States supporting operations for most deprived both under SO (m) and SO(l)</li> <li>• number of Member States envisaging specific mechanisms to support the end</li> </ul>

Merger	Expected effects	Indicators used
		recipients of assistance under SO(m) under other specific objectives
ESF and YEI	More flexibility in programming Simplification	<ul style="list-style-type: none"> <li>reduced number of programmes, priorities in the programmes and indicators used</li> </ul>

Source: DG EMPL

To safeguard that sufficient efforts are continued to support the youth and most deprived, the ESF+ Regulation sets out in Article 7(3)-(6) the so-called thematic concentration requirements, prescribing the minimum share of Member States' allocations dedicated to youth employment, social inclusion, aid to the most deprived and fight against child's poverty (for details see [Annex VII](#)).

To reinforce the alignment with EU policy priorities, the link with the European Semester and country-specific recommendations (CSRs) was strengthened by Article 7(2) of the ESF+ Regulation, which calls on Member States to 'allocate an appropriate amount of their resources of the ESF+ strand under shared management' to implement relevant CSRs relating to structural challenges, which it is appropriate to address through multiannual investments falling within the scope of the ESF+. Furthermore, in preparation for the current programming period 2021-2027, in 2019 each Country Report prepared in the context of the European Semester included an assessment and an overview of priority areas for investment (Annex D). The investment priorities outlined in the 2019 European Semester process formed the basis for ESF+ programming.

In order to reduce the administrative costs over the 2021-2027 programming period, the use of tools for performance-based management was further encouraged. Dedicated templates for simplified cost options (SCOs) and financing not linked to cost (FNLC) schemes were developed and attached to the programme model which was expected to result in easier and wider use of these tools. The use of SCOs is also promoted by simplifying rules and calculation methods, providing more off-the-shelf options, and making them compulsory for operations of small amounts.

In the 2021-2027 programming period, the enabling conditions<sup>33</sup> were streamlined and their number reduced which was expected to simplify the process of their assessment. At the same time their fulfilment is monitored and checked throughout the whole programming period and not only at the start (for more details see [Annex VII](#)).

## 2.2. Points of comparison

Throughout this Staff Working Document, the ESF+ is compared to the funds implemented in the previous programming period: ESF, YEI, FEAD and EaSI. The effects of the changes in the design on programming and implementation are compared in qualitative and quantitative terms across the evaluation criteria. The expected effects described in the ESF+ impact assessment are used as basis for the qualitative comparison. As the changes

<sup>33</sup>As set out in Article 15 of the Common Provisions regulation (CPR), when preparing a programme or introducing a new Specific Objective as part of a programme amendment, the Member State is required to assess whether the enabling conditions linked to the selected specific objective are fulfilled. Member States are also required to fulfil the horizontal enabling conditions, which are applicable to all specific objectives.

in ESF+ design were expected to impact the allocations for social inclusion, youth employment, most deprived and social innovation under shared management, the quantitative indicators in Table 2 are selected for the quantitative comparison.

**Table 2 - Points of comparison – effects on programming level**

Indicator	Period
Allocation for social inclusion	2014-2020
Allocation for youth (YEI v. thematic concentration on young)	2014-2020
Allocation for the most deprived (FEAD v. SO(l) and SO(m))	2014-2020
Allocation for social innovation (dedicated priority/shared management strand)	2014-2020

The progress in the implementation of the ESF+ shared management strand is compared with the achievements of the ESF and YEI at the end of 2016. Due to the late adoption of ESF+ and Common Provisions Regulation in June 2021 and priority given to implementing the still available 2014-20 funds, REACT-EU and RRF, none of the 169 ESF+ programmes were adopted in 2021; 148 programmes were adopted only in 2022 (96 adopted only in the last quarter); and 21 programmes were adopted in 2023-2024. Implementation started only in 2023. Conversely, in the 2014-2020 programming period<sup>34</sup>, most of the programmes had been adopted in 2014 (68%, 127 out 187). For these reasons, it is considered appropriate to compare the implementation of ESF+ shared management strand from June 2021 to December 2024 with the first three years of implementation under the previous programming period (2014-2016).

ESF+ performance at the EU level is measured by Key Performance Indicators monitored in MFF Performance Results Reports<sup>35</sup>. These indicators represent the main outputs and results to be achieved by the fund by 2029, therefore they are used as the quantitative points of comparison for the progress in implementation. The progress to their targets is reported by the Commission in the programme performance statements and used in the budgetary discharge by the European Parliament. DG EMPL's preparations to the next programming period are also informed by the achievements of KPIs. At the same time, the achievement values of all common indicators as well as the progress to their and programme specific indicators' targets are monitored at programme level. These are set out in the programmes in line with their intervention logic and agreed with the Commission during the programme negotiations. For the first time, in 2021-27 the managing authorities had to prepare methodologies for each programme in line with the CPR and submit them to the Commission together with the programmes.

To ensure the methodologies are sound (indicators are clearly defined and targets are based on verifiable estimation methods and reliable data), DG Employment trusted a contractor (the ESF+ Data Support Centre) to review the methodologies. The monitoring of progress to targets takes place, for example, in the programme monitoring committees. Geographical desks of DG Employment, Social Affairs and Inclusion, as members of the committees, regularly discuss implementation considering progress to targets (achievement ratios). In the annual performance meetings, the Commission services and

<sup>34</sup>Taking as a reference point the start of the programming period, the Common Provisions Regulation 2014-20 and ESF Regulation were published in December 2013 i.e. 6 months earlier than in the 2020-2027 programming period.

<sup>35</sup>Link: [https://commission.europa.eu/document/5ce5a9df-7f2f-4b96-8761-7f67c2642f94\\_en](https://commission.europa.eu/document/5ce5a9df-7f2f-4b96-8761-7f67c2642f94_en)

the national authorities assess the programme's targeting, its outreach to the target groups and the change in the target groups' labour market situation through the common output and result indicators.<sup>36</sup>

In Section 3, which describes the state of play of ESF+ during the evaluation period, the KPI's achievement in 2024 is compared to the values achieved in 2016 (Table 4 Section 3.1). Section 4, under effectiveness, compares their progress towards final targets with the progress achieved in 2016 towards observed values for 2022 (latest data point available)<sup>37</sup> (Table 7 Section 4.1). The set of Key Performance Indicators is complemented with indicators on expenditure declared by beneficiaries to compare the absorption rate between the programming periods.

For the EaSI strand, the six primary indicators - five Key Performance Indicators (KPIs) and one Primary Performance Indicator (PPI) from the strand's Performance Measurement Framework - are used as quantitative points of comparison (Table 8 in Section 4). The primary indicators cannot be directly compared with the indicators from the former EaSI programme Performance Measurement System<sup>38</sup> as the consolidation of various EU funding instruments into ESF+ resulted in several changes in the EaSI strand objectives<sup>39</sup>, activities and monitoring approach (more details are provided in Annex VII). For this reason, milestones for 2024 of the primary indicators were calculated and used for the quantitative comparison. These milestones were obtained by dividing the final target for 2027 by 7 (numbers of years of the programming period) and then by multiplying this result by 4 (for the three years of implementation, i.e. 2021-2024). In this way, it was ensured that all milestones for 2024 are based on the target for 2027, regardless of whether the EaSI strand targets for 2027 are based on the previous programme or not.

### 3. HOW HAS THE SITUATION EVOLVED OVER THE EVALUATION PERIOD?

#### 3.1. Shared management strand state of play

##### *Shared management strand – programming*

The total budget of the ESF+ for the 2021-2027 programming period managed under the shared management strand is EUR 142 billion, with some EUR 95 billion of this coming from the EU budget. The ESF+ shared management strand is implemented by Member States in partnership with the Commission. For each programming period, the Member States and the Commission define key priorities for ESF+ investments, which are set out

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<sup>36</sup>Similarly to the 2014-2020 period, the achievements will be published and regularly updated in [Open Data Portal for the European Structural Investment Funds - European Commission | Cohesion Open Data](#).

<sup>37</sup>Comparison with 2014-2020 targets is not possible as target-setting changed between 2014-2020 and 2021-2027 for most core indicators of the Performance Results Reports.

<sup>38</sup>EaSI programme (2014-2020) was designed to contribute to the modernisation of employment and social policies (PROGRESS axis); to facilitate the access to labour markets and job mobility (EURES axis); and to increase access to micro-finance and social finance (Microfinance/Social Entrepreneurship axis). The EaSI Regulation defined nine specific objectives contributing to the achievement of five general objectives. A number of 42 indicators (one headline and two complementary for each objective) were used to measure the progress in the achievement of the EaSI programme objectives.

<sup>39</sup>In terms of objectives, Article 25 of the ESF+ regulation establishes 10 operational objectives for the EaSI strand that align with the 13 specific objectives (Article 4) of the whole fund, as well as with the ESF+ three policy areas (employment and labour mobility, education, and social inclusion).

in national and regional programmes. For the current period, a total of 169 programmes have been agreed, of which 115 are at regional level and 54 at national level (See [Table](#) in Annex VI). More specifically, 62% (EUR 88 billion) of the total fund is allocated to national programmes while 38% (EUR 54 billion) is allocated to regional programmes. Italy has the highest number of programmes (27), with the majority operating at regional level. Spain, France, Poland, Greece, and Germany follow closely with more than 10 programmes each.

The below analysis of allocation of resources provides a general picture of ESF+ shared management support and feeds into the assessment of the relevance criterion later in the report.

**The allocation of resources remains quite evenly distributed across the three main policy areas (thematic objectives in the previous programming period) (Table 3).** Comparing to the previous period, the thematic objectives (TOs) addressing the public administration capacity and the effects of the crisis due to the Covid-19 pandemic are no longer envisaged, while there is a new policy area dedicated to social integration and material deprivation (former FEAD).

**Table 3 – Allocation of ESF in 2014-2020 (including YEI and REACT-EU) and of ESF+ shared management in 2021-2027 (in EUR)**

2014-2020		2021-2027	
Thematic Objective	Allocation	Policy area	Allocation
Sustainable & Quality Employment	49 516 876 985	Enhancing effectiveness of labour markets & equal access	43 999 809 933
Educational & Vocational Training	36 295 327 429	Education & Training & Life-long learning	43 360 573 895
Social Inclusion	35 898 173 300	Social Inclusion & Poverty	39 804 103 671
-	-	Social integration & Material deprivation	11 084 834 113
Efficient Public Administration	4 096 055 671	-	-
Fostering crisis repair and resilience	19 662 567 244	-	-
<b>Total (excluding technical assistance)</b>	<b>145 469 000 629</b>	<b>Total (excluding technical assistance)</b>	<b>138 249 321 612</b>

Source: SFC financial allocation data, retrieved in February 2024 and Cohesion Data (financial implementation data 2014-2020), retrieved in August 2024.

The total available budget of the shared management strand is allocated to support a series of specific objectives (SO) ([Table](#) in Annex VI). The highest allocation (21.4%) is for SO(a), which seeks to improve access to employment and activation measures for all jobseekers, in particular young people, the long-term unemployed, inactive people, and disadvantaged groups, as well as promote self-employment and the social economy. Beyond that, the next highest allocations are to support SO(f), promoting equal access to inclusive education especially for disadvantaged groups (15.4%) and SO(h), fostering active inclusion with a view to promote equal opportunities (15.2%). The lowest portion of resources are allocated to actions of social inclusion for both non-EU-country nationals, including migrants (SO(i); 0.8%) and marginalised communities such as Roma people (SO(j); 0.7%).

To demonstrate the different approaches to the programming of the ESF+ shared management strand, Member States were divided on the basis of the degree of concentration of the resources:

- **High concentration:** Finland, Denmark, Luxembourg, Netherlands, Sweden, Cyprus, Belgium, Lithuania, France and Croatia. This category includes countries that chose a limited number of SOs (from 4 to 6), as well as some with a higher number of SOs (9 or 10) that decided to concentrate over 60% on two SOs (Belgium) and almost 80% on three SOs (France and Croatia);
- **Moderate concentration:** Estonia, Latvia, Germany, Hungary, Spain, Romania, and Ireland; the countries of this group allocated from 40% up to 58% (Spain) to two SOs. The exception is Hungary, where a notable share of resources (40%) has been concentrated on supporting the quality and inclusion of the education and training system (SO(e)), and Ireland, where 32% of the resources were absorbed by social integration (SO(l)) while the remaining resources addressed a limited number of other SOs;
- In countries classified as **low concentration** such as Italy, Slovakia, Greece, Poland, Czechia, Bulgaria, Slovenia, and Portugal, the highest allocations are for one particular SO, at over 30%, or for two SOs, both at over 20%, but the remaining resources are spread across several other SOs. It is worth noting that in Czechia and Poland, no SO exceeds the 20% threshold.

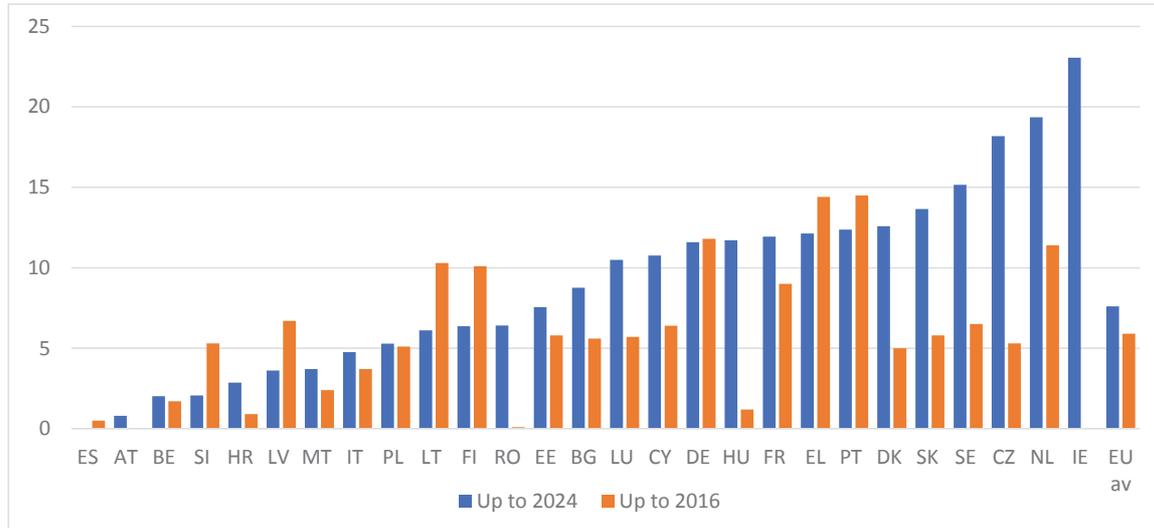
#### *Shared management strand – progress in implementation*

At the end of 2024, the eligible expenditure declared by beneficiaries amounted to 7.6% of the total allocation, equal to EUR 10.8 billion. Despite the late start, the expenditure was not only higher in percentage terms compared to 2014-2016 period for the ESF and YEI combined (5.9%) but also in absolute value (EUR 7.6 billion). In more than half of Member States (14), the expenditure rate remained below 10% of the country's allocation. Within this subset, Spain had reported no expenditure and four countries – namely Austria, Belgium, Croatia and Slovenia – reported values below 3%. At the other end of the spectrum, Czechia, Ireland and the Netherlands stand out with recorded expenditures of around 20% of their allocations ([Table](#) in Annex VI).

Among countries with a declared expenditure for 2021-2024, only Slovenia, Lithuania, Finland, Germany, Greece, Latvia and Portugal had a slightly lower level of expenditure

for this programming period compared to the first three implementation years of the previous programming period.

**Figure 2 – Percentage of expenditure up to 2016 and 2024**



*Source:* SFC financial implementation data, retrieved in May 2025, and Synthesis Report of ESF 2017 Annual Implementation Reports (financial implementation data 2014-2020).

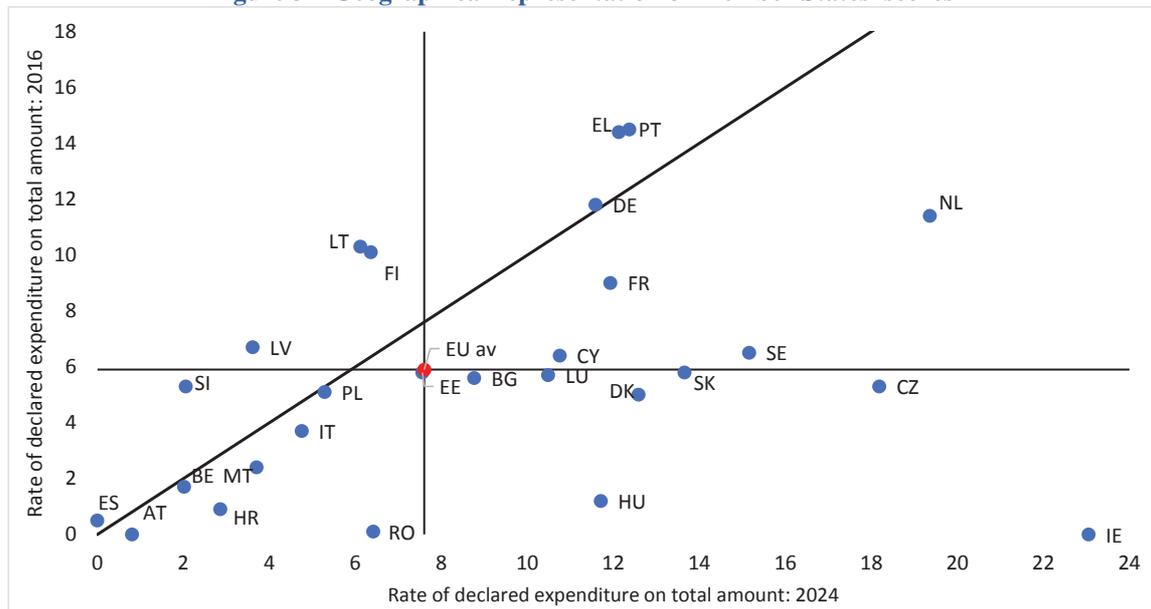
In order to compare the performance of each Member State to the previous programming period, the scatterplot in Figure 3 plots the EU average expenditure up to 2016 (vertical axis, ESF and YEI) against the EU average expenditure up to December 2024 (horizontal axis). Member States can thus be divided into the following four groups:

1. Greece, Germany, Portugal, the Netherlands, France, Sweden and Cyprus are above the EU average on expenditure in the current programming period, in line with the performance recorded in the 2014-2020 cycle (up to December 2016);
2. A large number of Member States (Spain, Austria, Belgium, Croatia, Romania, Malta, Italy, Estonia, Slovenia and Poland) are below the EU average both in 2016 and in 2024;
3. In contrast, Finland, Latvia and Lithuania, which had performed better than average in 2016, are currently below the EU average;
4. Finally, Bulgaria, Luxembourg, Denmark, Hungary, Slovakia, Czechia and Ireland are the Member States where the rate of expenditure has been below average in 2016, while their current average rate is higher than the EU average.

Thus, it appears that most Member States that were relatively late (or early) in implementing measures during the 2014–2020 period were also late (or, respectively, early) also in the 2021–2027 period. An attempt was made to discover patterns that would explain the reasons for this variation, but no correlation was found between the implementation progress in until 2024 and other variables potentially linked with the low absorption rates, such as the amount of unspent funding from the previous period in 2022,

perceived governance effectiveness<sup>40</sup>, quality of government<sup>41</sup> or population size. Overall, when correcting for the additional year of delay, the progress of expenditure is about the same, or slightly better in some cases.

Figure 3 – Geographical representation of Member States' scores



Source: SFC financial implementation data, retrieved in May 2025 and Synthesis Report of ESF 2017 Annual Implementation Reports (financial implementation data 2014-2020).. The 45-degree line indicates an unchanged rate of declared expenditures in 2016 and 2024.

When comparing the various categories of regions<sup>42</sup>, transition regions had at the end of 2024 the highest expenditure rate, averaging 8.6% of the budget. More developed regions followed, with an average expenditure of 8.4% of the budget, whereas less developed regions reported a lower 6.9% of average expenditure. Finally, outermost regions remarkably fall behind, having spent just above 3% of the total allocated budget.

Looking at the level of specific objectives (Table in Annex VI) the average expenditure rate was largely exceeded by two SOs (SO(f) *inclusive education* and SO(m) *addressing material deprivation* with expenditure rates above 10%. The expenditure rates were strongly below the EU-level average for SO(b) *modernising labour market institutions* and SO(c) *gender balanced labour market participation* recording expenditure rates below 4% at the end of 2024.

By end 2024, a total of 7.8 million persons were reported as ESF+ participants which corresponds to 96% of the participants reached between 2014 and 2016. At Member State

<sup>40</sup>[Home | Worldwide Governance Indicators](#)

<sup>41</sup>[European Quality of Government Index | University of Gothenburg](#)

<sup>42</sup>The EU Cohesion Policy defines the following categories of regions: a) Less developed regions, which have a GDP per inhabitant that is less than 75% of the EU average; b) Transition regions, which have a GDP per inhabitant that is between 75% and 100% of the EU average; c) More developed regions, which have a GDP per inhabitant that is above 100% of the EU average. The outermost regions are constituted by island, archipelagos and one land territory (French Guiana). They are home to close to 5 million EU citizens and are integral part of EU. See [https://ec.europa.eu/regional\\_policy/policy/what/investment-policy\\_en](https://ec.europa.eu/regional_policy/policy/what/investment-policy_en).

level, Italy and Spain reported the highest number of participants ([Table E](#) Annex VI). They both accounted for more than 20% each of the total, which is also can also be linked to the size of their financial allocation. Only one Member State did not report yet any participants under any of the specific objectives (Romania).

The highest share of participants (24.4%) has been reported under SO(f)<sup>43</sup> aiming at enhancing the quality of education and training and making them inclusive. At a broader level, the interventions for education and training (SO(e), SO(f), SO(g)) engaged the largest number of participants accounting for 38.3% of the total (3.0 million individuals), followed by the social inclusion interventions (SO(h), SO(i), SO(j), SO(k)) with 31.8% of the total (2.5 million). Finally, 30.0% of the participants (2.3 million) were involved in employment-related activities supported by SO(a), SO(b), SO(c), and SO(d).

Among the participants reported until the end of 2024, in terms of employment status, the majority were unemployed (38.6.2%), followed by inactive persons (37.7%) and by those who were employed (21.8%). With regards to age, younger people (under 29 years old) and children were the most represented groups as participants: together they accounted for 48.0% of the total.

Looking at participants' education level, persons with a low education level (ISCED 0-2) were the most represented (51.7%), while persons with tertiary education accounted for 16.5% of the participants. Persons with upper secondary education or post-secondary, non-tertiary education accounted for 30.0% of the participants.

As far as the disadvantaged groups are concerned, 13.4% of participants were from third countries (1 million), 8.0% were persons with disabilities (0.6 million) and 2.7%, corresponding to 209 357 individuals, belonged to minorities (including marginalised communities such as the Roma). These indicators were significantly higher in a number of countries, specifically: persons with disabilities in the Netherlands (45.2%) and Estonia (25.6%); third-country nationals in Austria (54.7%), Ireland (43.9%), Sweden (42.5%) and the Netherlands (34.5%); individuals belonging to minorities in Estonia (39.0%) and Bulgaria (37.9%).

With the uptick in implementation in the course of 2024, first concrete results also started to materialise. Of the 7.8 million persons reached with ESF+ support until the end of 2024, 2.4 million registered a positive short-term result<sup>44</sup>, corresponding to a success rate of 31.3% ([Table F](#) Annex VI). The most frequent results observed were gaining a qualification (1.1 million participants) and being in employment (0.9 million). The success rates vary by country and specific objective ([Table F](#) and [Table G](#) Annex VI), however given the delayed start of implementation and still incomplete reporting, especially for longer-term indicators, this picture is prone to changes as the implementation progresses.

In the previous programming period, which had reached slightly more participations at a comparable stage of implementation, slightly less short-term results had been reported at the end of 2016 (1.98 million), resulting also in a lower success rate of 24.4%. At the same

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<sup>43</sup>The participation in a given specific objective depends also on the frequency by which this objective has been selected by the Member States within their programmes.

<sup>44</sup> Based on the four common short-term result indicators: EECR01 "Participants engaged in job searching upon leaving"; EECR02 "Participants in education or training upon leaving"; EECR03 "Participants gaining a qualification upon leaving" and EECR04 "Participants in employment upon leaving"

time, the most frequent results were also gaining a qualification and being in employment (each 0.8 million).

As Table 4 below shows, the values of Key Performance Indicators at the end of 2024 and at the end of 2016. Indicators on participant characteristics show that there has been a slight change in the composition, with more participations from inactive persons, persons with lower secondary education or less, and those that are 55 years of age and above. In terms of results, a shift towards more participants gaining a qualification and being in education or training and less participants engaged in job searching upon leaving is observed. Considering figures related to the ex-FEAD (SO(m)), at the end of 2024 monitoring data were largely incomplete with more than half of Member States that had allocated budgets to this specific objective not reporting or only partially reporting. Therefore, the low achievement values, especially for the number of end recipients receiving food support are not representative of the true implementation on the ground and are reported only for the sake of completeness.<sup>45</sup>

**Table 4 – Values of shared management strand KPIs compared to the previous programming period**

Key Performance Indicators	2014-2020: implemented values up to 2016	2021-2027 implemented values up to 2024	2024 value/2016 value (%)
<b>Specific Objective 1: Policy area - Employment and labour mobility</b>			
Participants in employment, including self-employment, upon leaving	810 397	857 741	105.8%
Unemployed, including long-term unemployed, participants reached	4 177 458	3 028 802	72.5%
Inactive participants reached	2 105 021	2 947 850	140.0%
Number of participants 55 years of age and above reached	461 592	764 362	165.6%
<b>Specific Objective 2: Policy area - Education</b>			
Participants with lower secondary education or less (ISCED 0-2) reached	3 400 402	4 030 227	118.5%
Participants with tertiary education (ISCED 5-8) reached	1 255 188	1 283 716	102.3%

<sup>45</sup> For a comprehensive overview of monitoring issues, see ESF+ Synthesis Report 2024 (forthcoming).

Key Performance Indicators	2014-2020: implemented values up to 2016	2021-2027 implemented values up to 2024	2024 value/2016 value (%)
Participants gaining a qualification upon leaving	750 166	1 072 376	143.0%
Participants in education or training upon leaving	275 478	389 051	141.2%
<b>Specific Objective 3: Policy area - Social inclusion, including contributing to poverty eradication and health</b>			
Participants with disabilities reached	633 462	623 466	98.4%
Participants considered as part of disadvantaged groups reached (Participants with a foreign background, minorities including Roma people, third-country nationals)	1 215 476	1 394 981	114.8%
Participants engaged in job searching upon leaving	148 426	121 690	82.0%
Number of end-recipients receiving food support	38 523 871	2 459 012	6.4%
Number of end-recipients receiving material support	1 516 050	653 574	43.1%

Source: SFC data, retrieved in May 2025 and Synthesis Report of ESF 2017 Annual Implementation Reports (implementation data 2014-2020).

Notes: (1) The category 'participants with foreign background' was defined more broadly in ESF 2014-2020 and also included migrants and minorities. These are now separate indicators in ESF 2021-2027 and there might be an overlap between third country nationals and participants with foreign background as the latter is based on national definitions. Therefore, the sum displayed here takes the maximum value of these two indicators per country and adds the sum of minorities to exclude double counting in the EU sum. This is however a lower estimate as the overlap of indicator definitions varies by country.

### 3.2. EaSI strand state of play

The total budget allocated to the EaSI strand in 2021-2027<sup>46</sup> is EUR 894 million in current prices. This amount comprises the EaSI strand budget (EUR 762 million), and the financial envelope (EUR 132 million) transferred to the EaSI strand from the shared management

<sup>46</sup>As set in the ESF+ Regulation, this budget includes the EaSI strand financial envelope in line with Article 5(3) and the financial envelope transferred from the ESF+ shared management budget to implement the transnational cooperation to facilitate the scaling up of innovative solutions as referred to in Article 5(2).

strand envelope for the implementation of transnational cooperation to facilitate the upscaling of innovative solutions (see Section 1.1).

When looking at the two financial envelopes relevant for the EaSI strand (see Table 5 below), it appears that the budget planned steadily progresses in its implementation in relation to the first envelope (from 93% in 2021 to 99% in 2024). The second envelope shows an absorption rate of almost 100% throughout all three analysed years.

**Table 5 – State of play of the EaSI strand financial envelopes**

Budget line	EaSI strand envelope (Article 5.3)			Envelope for scaling up social innovations (Article 5.2)		
	Planned budget	Implemented	Absorption rate	Planned budget	Implemented	Absorption rate
<b>2021</b>	99 982 373	92 614 738	92.63%	26 530 200	26 530 200	100.00%
<b>2022</b>	93 237 964	88 231 545	94.63%	13 530 402	13 528 002	99.98%
<b>2023</b>	100 604 370	98 102 431	97.51%	30 308 100	30 308 100	100.00%
<b>2024</b>	101 197 331	100 525 443	99.34%	30 860 140	30 860 140	100.00%
<b>TOTAL</b>	<b>395 022 038</b>	<b>379 474 157</b>	<b>96.06%</b>	<b>101 228 842</b>	<b>101 226 442</b>	<b>100.00%</b>

Source: DG EMPL

The EaSI strand is implemented under direct and indirect management modes. Under direct management, grants and procurement are funded by the Commission. Under indirect management activities are implemented in partnership with EU partners, international organisations or other entrusted organisations.

When it comes to **grants**, there are direct grants<sup>47</sup> (awarded without a call for proposals on the basis of Article 195 of the Financial Regulation), and action and operating grants awarded based on calls for proposals<sup>48</sup>. The EaSI Annual Work Programmes establish the main policy priorities to which the EaSI strand contributes in a given year<sup>49</sup>. A summary of the main priorities and calls for proposals launched under EaSI strand in 2021-2024 is presented in [Table Annex VI](#).

<sup>47</sup>For instance, events organised by the Presidency of the Council of the EU, or direct grants to Member States to implement the Labour Force Survey (LFS), to the International Agency for Research on Cancer (IARC) Monographs or to the International Commission on Non-Ionizing Radiation Protection (ICNIRP).

<sup>48</sup>For instance, direct grants to support the EURES Targeted Mobility Scheme (TMS) or the social innovation projects and operating grants to support EU-level NGOs networks including those active in the areas of social entrepreneurship and microfinance.

<sup>49</sup>The selection of activities funded by the EaSI strand are decided following internal discussion among the DG EMPL Directorates and involves EaSI stakeholders via structured consultation processes (EaSI strand Technical Working Group members and EU-level civil society organisations). This process should ensure coverage of all EaSI strand operational objectives during the programming phase (prior to approving the annual work programme), which facilitates the monitoring and evaluation processes. This approach also helps identify any implementation problem(s) compromising the realisation of the final targets with respect to one or more KPSs/PPI.

The strand is also implemented directly through **procurement contracts** (call for tenders and framework contracts or administrative arrangements). The policy areas addressed through these procurement (service) contracts according to the 2021-2024 work programmes (which reflect the EaSI strand policy priorities) were: employment and skills; social protection and inclusion; labour markets and labour mobility; safe and fair working conditions; and cross-cutting issues.

Under **indirect management**, several implementation organisations were selected through calls for expression of interest to work under indirect management with DG EMPL 2021-2027. Those entities include: the Lithuanian Implementation Agency for ESF+ (ESFA); the Organisation for Economic Co-operation and Development (OECD); the Joint Research Centre (JRC); the International Labour Organization (ILO); the World Health Organization (WHO); and the Council of Europe (CoE).

The EaSI funding under the direct and indirect management modes of the ESF+ also covers **other actions or expenditure** such as different meetings, ad-hoc committees, and other events; scientific support for evaluation of chemicals at work; support for data collection and management, analysis, studies, and evaluations; and various publications.

As shown in Table 6 below, the overall absorption rate (SIP 1)<sup>50</sup> for the period 2021-2024 indicates a high degree of execution (97%) with respect to the budget planned in the EaSI strand Annual Work Programmes (AWP). The overall budget consumption rate (SIP 2)<sup>51</sup> for the period 2021-2024 shows that payments are in progress (29%). Payments will increase as the implementation of the EaSI strand moves forward, honouring legal obligations from the funds already committed.

**Table 6 – EaSI strand secondary input performance indicators (SIP) and values attained in 2021-2024**

Indicator	Formula	Calculation (EUR)	Share (%)
<b>SIP 1 - Absorption rate (commitments)</b>	Planned budget (planned)/implemented (individual + global commitments)	496.250.880,00 / 480.700.597,87	96,87%
<b>SIP 2 - Budget consumption rate (payments)</b>	Budget already spent / total budget	261.765.761,29 / 893.814.025,00	29,3%

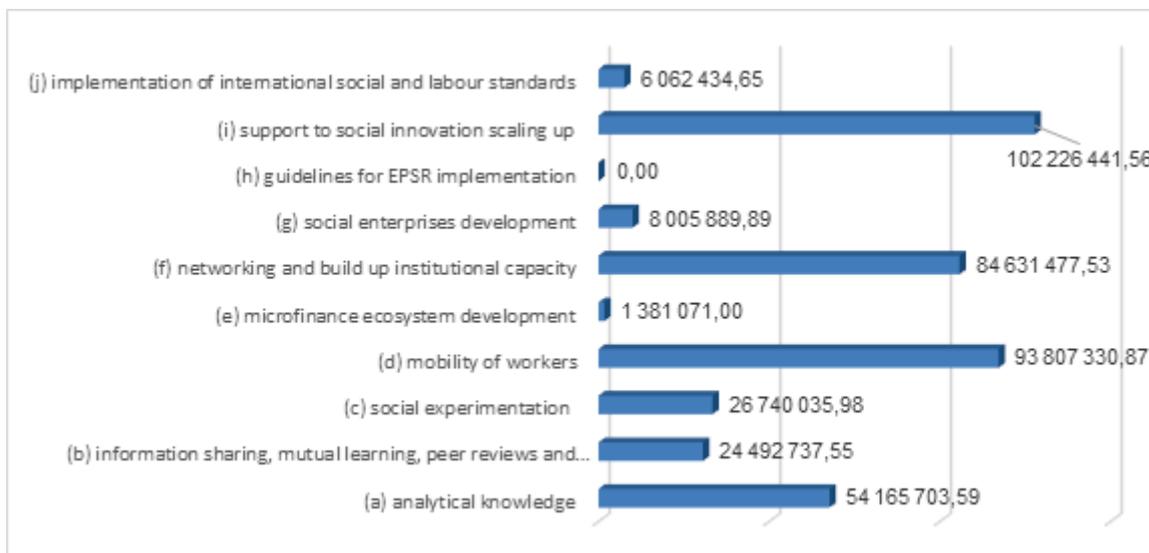
Source: DG EMPL **Error! Reference source not found.**

<sup>50</sup>The input indicator SIP 1 - Absorption rate is obtained from the total executed budget (individual and global commitments) divided by the planned budget of each EaSI Annual Work Programme (and their amendments). They include direct and indirect management of the two budget lines, corresponding to the two financial envelopes funding the EaSI strand: the 07.020400 EaSI financial envelope (the administrative budget line is excluded as it is not part of the AWP) and the 07.020100.05 ESF+ shared management financial envelope (implementation of the Social Innovation Plus Initiative by ESFA).

<sup>51</sup>The input indicator SIP 2 – Budget consumption rate is obtained from the total payments (budget already spent) divided by the total EaSI budget according to the ESF+ Regulation. It includes payments belonging to the 3 budget lines of the EaSI strand: 07.020400 for the EaSI financial envelope, 07.020100.05 for the ESF+ shared management envelope (implementation of the Social Innovation Plus Initiative by ESFA) and the 07.010102 EaSI administrative budget line.

Figure 4 provides a distribution of the EaSI budget in 2021-2024 across the **operational objectives**, showing that about 32% of the funds were directed towards supporting operational objectives c and i (support provided to social innovation testing and upscaling); about 23% to support the mobility of workers (operational objective d), around 14% to support the production of analytical knowledge (objective a), and around 2.3% to support the development of social finance ecosystems (operational objectives e and g). An important share of funding – around 27% – was committed to build stakeholders’ capacity through support provided to EU-level NGOs (objective f), and through mutual learning and peer reviews (objective b). As regards the objective h, the approved annual work programmes for 2021-2025 do not include any activity for this specific operational objective of the ESF+ Regulation. Therefore, the discussions for the selection of activities for the annual work programmes 2026 and 2027 should include activities related to this operational objective.

**Figure 4 - Commitments per EaSI strand operational objective in 2021-2024**



Source: DG EMPL

In terms of distribution of budget commitments per beneficiary country (see

Table I in Annex VI), Lithuania benefitted from the highest amount in 2021-2024, followed by Belgium, Germany and Luxembourg. These figures are explained by the implementation of the Social Innovation Plus Initiative (by ESFA Lithuania), stakeholders’ participation in EURES calls for cross-border partnerships and targeted mobility schemes (Germany)<sup>52</sup> and in recurrent calls for EU-level NGO networks operating grants (Belgium). As regards Luxembourg, an important number of activities (IT services, studies,

<sup>52</sup>In practice, for the EU-level NGO networks that signed the Framework Partnership Agreements, their chances for obtaining an operating grant mainly depended on them submitting an annual proposal; therefore, their success rate is close to 100%. Similarly, the EURES calls for proposals are specific and targeted, resulting nearly in a 100% success rate of the applications submitted.

conferences, external meetings and travel, consultancy, evaluation services, communication and publications, translation/interpretation, training, supply contracts, services linked to buildings, action and operating grants) are implemented by organisations located in this country.

## 4. EVALUATION FINDINGS (ANALYTICAL PART)

### 4.1. To what extent was the intervention successful and why?

#### Effectiveness

##### *Delivering on objectives of ESF+ shared management strand*

Implemented since 1958, ESF has proven to be an effective instrument supporting labour market policies and investing in people. The most recent available data from the previous programming period (2014-20) show that more than one third (35%) of participants in the ESF operations up to 2022 achieved a positive result (finding employment, gaining a qualification, starting a job search or education/training)<sup>53</sup>. However, as explained in the introduction, **the assessment of the effectiveness of ESF+ under shared management was not yet possible at the moment of conducting this evaluation** because the level of implementation was not sufficiently advanced for this type of analysis (described in Section 3).

**The level of achievement of the 2029 EU targets for the output and results indicators selected as points of comparison** (see Table 7 below) **was between 8.1 and 14.8% at the end of 2024**. This corresponds roughly to the level of financial implementation (7.6% absorption rate). At the same time, the ESF+ implementation (excluding ex-FEAD activities) was about as advanced at the end of 2024 as in the previous programming period. In 2016, the progress in physical implementation was between 7.5 and 21.5% for the same indicators (excluding FEAD) measured against their actual achievement in 2022 (latest data point available). In the current programming period, the same indicators are between 8.1 and 14.8% of their 2029 targets (Table 7). Still, the currently observed values for these indicators are considered at a lower bound due to delays in introducing the data into the system. In a survey about ESF+ monitoring and information systems, managing authorities declared that 27.8% put in place completely new systems and the majority (55.6%) were not fully operational in April 2024.<sup>54</sup> An additional cause may be the managing authorities' decisions to report data on participants only after completion of the operations. This delayed reporting is evidenced by discrepancies when comparing reported expenditure and outputs reported at the end of 2024. For instance, Romania and Greece reported considerable expenditures, but still no or very limited participations.

The cost per participant data available at the end of 2024 suggest a huge variation (ranging from less than EUR 200 per participant to more than EUR 8,000 in Czechia, Estonia,

<sup>53</sup>ESF Synthesis report 2023 (Annual Implementation Reports 2022) and Study supporting the ESF 2014-2020 ex-post evaluation, ongoing.

<sup>54</sup>The survey has been carried out by the ESF+ Data Support Centre. Responses have been gathered about 54 systems which cover 145 programmes.

Greece and Latvia). This variation is much larger than in the preceding programming period (when costs per participants ranged between around EUR 700 and EUR 4,400 per participant). A part of this variation reflects composition effects, as the cost per participant differs depending on the type of operations financed by each Member State. However, due to delayed reporting and differing data collection practices, the data on cost per participant cannot be reliably compared across Member States or with the previous programming period at this stage. Such comparisons will only be possible in the ex-post evaluation.

Inflation was especially high in Hungary, Slovakia, Czechia, Poland, and the Baltic countries at the beginning of the programming period. For instance, in Hungary, the consumer price index increased by 42% between 2020 and 2022. High inflation was partly offset by a 9% currency depreciation during the same period, as allocations of the ESF+ in EUR corresponded to higher allocations in forints. However, the effect of the inflation was stronger, and the real value of allocations in the forints still declined significantly by 23%<sup>55</sup>. Even though costs of intervention increased in the beginning of period due to high inflation, this did not lead to significant programme modifications. Some countries like Czechia and Latvia have made minor target modifications, partly in response to inflation. In particular, high inflation has had a greater impact on the implementation of SO(m) due to rising food prices. For example, in Latvia, the cost per food package increased by 61% between 2021 and 2023, while demand also continued to rise, placing additional pressure on the programme<sup>56</sup>.

**Table 7 – Achievement of shared management strand KPIs targets compared to the previous programming period**

Key Performance Indicators	2014-2020			2021-2027		
	Implemented value at the end of 2016	Implemented value at the end of 2022	2016 on target 2022 (%)	Implemented value at the end of 2024	Target value 2029	2024 on target 2029 (%)
<b>Specific Objective 1: Policy area - Employment and labour mobility</b>						
Participants in employment, including self-employment, upon leaving	810 397	6 348 579	12.8%	857 741	7 400 000	11.6%
Unemployed, including long-term unemployed, participants reached	4 177 458	19 407 013	21.5%	3 028 802	21 500 000	14.1%

<sup>55</sup> Following the formula that  $1+r = (1+\epsilon)/(1+\pi)$ , where  $r$  is change in real value of the allocation in national currency,  $\epsilon$  is exchange rate changes and  $\pi$  – inflation (change annual average of the Harmonised Index of Consumer Prices over 2020-2023).

<sup>56</sup> Eiropas Savienības kohēzijas politikas programmas 2021.-2027.gadam vidusposma novērtējums. [https://tapportals.mk.gov.lv/attachments/legal\\_acts/document\\_versions/3384892c-703a-4d61-a2fa-142d037c94b8/download](https://tapportals.mk.gov.lv/attachments/legal_acts/document_versions/3384892c-703a-4d61-a2fa-142d037c94b8/download)

Key Performance Indicators	2014-2020			2021-2027		
	Implemented value at the end of 2016	Implemented value at the end of 2022	2016 on target 2022 (%)	Implemented value at the end of 2024	Target value 2029	2024 on target 2029 (%)
Inactive participants reached	2 105 021	24 261 644	8.7%	2 947 850	24 200 000	12.2%
Number of participants 55 years of age and above reached	461 592	6 141 546	7.5%	764 362	6 400 000	11.9%
<b>Specific Objective 2: Policy area - Education</b>						
Participants with lower secondary education or less (ISCED 0-2) reached	3 400 402	31 977 301	10.6%	4 030 227	31 100 000	13.0%
Participants with tertiary education (ISCED 5-8) reached	1 255 188	10 814 420	11.6%	1 283 716	11 000 000	11.7%
Participants gaining a qualification upon leaving	750 166	9 828 230	7.6%	1 072 376	9 100 000	11.8%
Participants in education or training upon leaving	275 478	2 790 717	9.9%	389 051	2 900 000	13.4%
<b>Specific Objective 3: Policy area - Social inclusion, including contributing to poverty eradication and health</b>						
Participants with disabilities reached	633 462	3 976 122	15.9%	623 466	4 200 000	14.8%
Participants considered as part of disadvantaged groups reached (Participants with a foreign background, minorities including Roma people, third country nationals)	1 215 476	8 654 145	14.0%	1 394 981	10 900 000	12.8%
Participants engaged in job searching upon leaving	148 426	1 442 883	10.3%	121 690	1 500 000	8.1%

Source: Synthesis Report of ESF 2017 and ESF 2022 Annual Implementation Reports (implementation data 2014-2020), SFC data, retrieved in May 2025, for 2021-2027 period.

### *Delivering on the EaSI strand objectives*

The EaSI strand Performance Framework includes six primary performance indicators (see Table 8 below) to report on the strand's progress towards the achievement of its specific objectives and operational objectives (see EaSI strand Intervention Logic in [Annex VIII](#)). The Performance Framework establishes concrete targets for these indicators at the end of the current programming period. As explained in Section 2.2, for the mid-term evaluation purpose, the comparison is made between the actual implementation in 2021-2024 and the milestones estimated for 2024.

Table 8 below shows that **EaSI strand implementation is overall on track**, with most Key Performance Indicators being in line with or above the expected delivery at the end of 2024.

More specifically, KPI 1 'Number of analytical activities'<sup>57</sup> has shown overall positive performance from 2021 to 2024, slightly below the milestone for 2024. This level of implementation per year should permit to reach the target at the end of the programming period (199 activities). EaSI strand Stakeholder Survey<sup>58</sup> results indicate as well high satisfaction with the quality and relevance of EaSI-generated evidence, with 76% finding it is useful and 68% agreeing it is high quality and relevant to EU policy.

KPI 2 'Number of information-sharing and mutual learning activities'<sup>59</sup> was below the expected delivery to date, and about a third of the 2027 target. This figure is partially explained by the low number of activities in 2021 (only 15, almost half of the indicative average of 27, due to Covid-19 pandemic effects on events). Even if in 2022 the number climbed to 28, it did not compensate the gap. In 2023, the number of activities lowered again to 22, while in 2024 to 17, justifying a closer attention to this indicator in the subsequent programming processes. However, the EaSI strand stakeholder survey results indicate a largely positive perception of these activities, with 92% of respondents agreeing that EaSI activities facilitate effective information exchange and 76% believing they contributed to policy design.

KPI 3 'Number of social experimentation/innovation activities'<sup>60</sup> has overachieved its milestone for 2024. This level of execution per year should permit to reach the target at the end of the programming period (14 activities). Stakeholder survey results indicate a largely

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<sup>57</sup>KPI 1 refers to EaSI analytical outputs ranging from flagships such as the Eurobarometer surveys, to some publications with less reach receiving very few citations. Support for implementing international labour standards was provided through surveys and partnerships. However, no outputs were produced for the operational objective on guidance on implementing the European Pillar of Social Rights in this period.

<sup>58</sup>EaSI strand monitoring report, forthcoming in second quarter of 2025 (<https://op.europa.eu/en/>).

<sup>59</sup>KPI 2 refers to EaSI strand supported initiatives across various sectors, including the Public Employment Services Network, social economy stakeholders, and mutual learning programmes in employment, social protection and inclusion, and working conditions.

<sup>60</sup>KPI 3 refers to EaSI strand initiatives in testing and evaluating innovative solutions in employment, social affairs and inclusion fields.

positive perception of these activities, with 68% of respondents agreeing that EaSI activities contributed to social innovation and experimentation.

KPI 4 ‘Number of capacity-building and networking activities’<sup>61</sup> has also overachieved its milestone. This level of execution per year should permit to reach the target at the end of the programming period (75 activities). The EaSI stakeholder survey results indicate a largely positive perception of these activities, with 76% of respondents agreeing that EaSI strand activities contributed to capacity building and networking.

**Table 8 - EaSI strand actual implementation compared with milestones for end-2024**

Indicator	Target (2021 - 2027)	Actual implementation (2021 - 2024)	Milestone 2024 (point of comparison)	% of the point of comparison
KPI 1 - Number of analytical activities	199	110	114	97%
KPI 2 - Number of information-sharing and mutual learning	191	81	109	74%
KPI 3 - Number of social experimentation/innovation	14	9	8	113%
KPI 4 - Number of capacity-building and networking	75	50	43	116%
KPI 5 - Job placements targeted mobility schemes	14 500	4 708	8 286	57%
PPI 6 <sup>62</sup> - Activities supporting microfinance and social	12	5	7	71%

Source: DG EMPL

KPI 5 ‘Job placements under targeted mobility schemes’<sup>63</sup> has shown steady progress despite initial challenges. Job placement is indeed at about 57% of the milestone for 2024 and at about 32% of the 2027 target. Due to the late approval of the ESF+ Regulation in June 2021, even if the first call for the Targeted Mobility Schemes (TMS) was launched in July 2021, the projects started in July 2022. However, the number of job placements is likely to increase in the coming years as the implementation of the strand progresses, as confirmed by the upward trend (the number of jobs created in 2024 increased by 127% compared to 2023). Additionally, the stakeholder survey indicates a positive perception of the related activities, with 87% of respondents reporting that support services have increased employment opportunities. Despite this slow start, the upward trend in job placements and positive stakeholder feedback suggest that KPI 5 is making progress

<sup>61</sup>KPI 4 refers to EaSI strand activities focusing on supporting networks, capacity building initiatives, and transnational cooperation projects.

<sup>62</sup>PPI - Primary Performance Indicator – see explanation in [Annex VII](#).

<sup>63</sup>KPI 5 refers to activities implemented under the EURES Targeted Mobility Scheme and Cross-Border Partnerships. KPI 5 is an outcome and not an output: by definition, the results come later.

towards its goal of enhancing voluntary geographical mobility of workers and expanding employment opportunities across the European labour market.

PPI 6 ‘Activities supporting microfinance and social entrepreneurship’<sup>64</sup> has shown a steady increase in activities over the first three years, from one in 2021 to five in 2023. The PPI 6 has no activities in 2024, as efforts are focused on a social innovation call for proposals that align with the objectives of PPI 6, i.e. developing impact performance intelligence services for social impact investing market actors. Since the performance framework does not allow an activity to be counted under two different KPIs/PPIs, this activity, planned for execution in 2025, will be included under KPI 3 Social Innovation. This specificity should be considered when interpreting the absence of 2024 activities and its impact on the final targets.

Overall, the EaSI strand is making substantial progress towards its objectives, with most KPIs on track or ahead, and only KPI 2 and KPI 5 requiring enhanced focus to ensure full target achievement by the end of the programming period. Stakeholder perceptions remain positive across all areas, further supporting the strand’s relevance and impact. The EaSI strand has also increased the efforts to promote social innovation (by launching calls for proposals) as well as its transferability and scaling up across Europe (notably through the new Social Innovation Plus Initiative). Although it is too early to fully assess the potential for transferring or scaling up projects implemented during the current programming period, as most projects are still ongoing, some projects with potential for future scaling-up and transferability were identified (see [Table W](#), Annex VII)<sup>65</sup>.

Moreover, the EaSI strand has addressed horizontal principles as outlined in Articles 28 and 6 of the ESF+ regulation (see examples of EaSI funded activities which integrate horizontal principles in [Table V](#), Annex VII). EaSI strand survey results indicate that stakeholders recognise these efforts, with 76% of respondents agreeing that EaSI activities contribute to gender equality, 72% to equal opportunities and non-discrimination, and 68% to accessibility for persons with disabilities. These figures are comparable to the stakeholders’ perception for the previous EaSI programme. Concrete examples of EaSI’s contribution include funding projects that promote women’s entrepreneurship and labour market participation, supporting initiatives for the inclusion of people with disabilities in the workplace, and backing programmes that combat discrimination against vulnerable groups.

### *Effects of the changes in the ESF+ design*

#### *General synergies between the shared management and EaSI strands*

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<sup>64</sup>PPI 6 refers to supporting social enterprises and social investment, with activities including the development of financial instruments, capacity building, and knowledge sharing.

<sup>65</sup>These examples were identified based on the desk research conducted for the first [EaSI strand performance monitoring report](#), using the Social Innovation Match database (<https://european-social-fund-plus.ec.europa.eu/en/social-innovation-match>), alongside interviews with European Commission Operational Units managing the current calls for proposals on social innovation.

The rationale behind the merger of the ESF (shared management mode) and EaSI programme (direct/indirect management mode) under one single legal basis<sup>66</sup> was to improve the coherence and create synergies between interventions previously implemented separately. The evaluation findings suggest that **the effects of the merger of the ESF and EaSI programme have not yet emerged**. While this may partly be due to the slow start of activities under direct, indirect and shared management (for the programming period 2021-2027, stakeholders consulted at both EU and national level provided mixed views in relation to the potential for synergies of the new ESF+ architecture. Overall, many of the stakeholders interviewed<sup>67</sup> either fail to see concrete changes in the articulation of the two strands or think it is still too early to see the results of the merger. They remark that, at this stage, the two strands still remain very distinct in terms of stakeholders involved at the different levels (i.e. Commission, EaSI strand National Contact Points, managing authorities), timing, governance mode and procedures (i.e. centralised for the EaSI strand and decentralised for the shared management strand), and also in terms of the nature of the actions supported. These views are confirmed by the results of the surveys targeting respectively the ESF+ managing authorities and the EaSI strand stakeholders<sup>68</sup>.

Limited synergies between strands were reported by both categories of stakeholders surveyed, notably in terms of governance, policy planning and design, implementation mechanisms, and monitoring and evaluation. These results suggest that there are several areas in which the two strands continue to operate separately. However, about 46% of managing authorities surveyed that expressed an opinion (19 of 41 responses)<sup>69</sup> indicate that the merger had a positive effect on collaboration between them and stakeholders involved in social innovation under the EaSI strand. Similarly, about 57% of the respondents to the EaSI strand survey (42 of 74 responses<sup>70</sup>) consider that the new ESF+ architecture is better suited than the previous one (ESF and EaSI as separate programmes) to help stakeholders from different strands to collaborate.

However, the available evidence does not allow to clearly link these results to the merger of the two funds under ESF+ as the results above refer mostly to measures taken to improve the communication and collaboration between stakeholders (e.g. National Contact Points,

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<sup>66</sup>Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021 establishing the European Social Fund Plus (ESF+) and repealing Regulation (EU) No 1296/2013.

<sup>67</sup>About 100 stakeholders: ESF+ beneficiaries (FI, LT, PL, PT, SI, SK), ESF+ Coordinating bodies (BG, FR, IT), ESF+ Intermediate Bodies (DE, FI, FR, HR, IE, IT, LV, NL, PL, PT), ESF+ MA (FR, IT, NL, PL), Members of the ESF+ Committee Employer Rep (CZ, EL, RO, SE), Members of the ESF+ Committee Government Rep (AT, BE, CZ, DE, EE, FI, FR, HU, IE, IT, LT, PL, PT, RO, SE), Members of the ESF+ Committee Workers' Rep (LV, SE), ministries' (Units) working on ESF+ (CZ, EL, FI, LT, LV, NL, PL, SI, SK), Organisations representing participants (EL, IT, PL), Other (IT), Research / Academic institutions (HU, PL, SI, SK); CoP (Transnational, Transnational), EaSI Beneficiary (direct) (ES, ES, FR, IT, PL, SE), EaSI Beneficiary (indirect) (MT, RO), NCP (BG, CZ, FR, IT, MT, SI), EC Representatives, EU-level beneficiaries (EaSI).

<sup>68</sup>Two targeted surveys were conducted during the study supporting the ESF+ mid-term evaluation: one targeting ESF+ managing authorities and one targeting EaSI strand stakeholders. A total of 165 responses were received in total, 91 responses to the survey of ESF+ managing authorities and 74 to the survey of EaSI strand stakeholders.

<sup>69</sup>50 respondents indicated not to be able to answer this question.

<sup>70</sup> 26 respondents indicated not to be able to answer this question.

Communities of Practice, National Competence Centres, the two strands' Technical Working Groups joint meetings) that could have been introduced without merging ESF and EaSI. Some participants in the two focus groups highlighted the particular added value of these activities bringing stakeholders from the two strands together. They also suggested that the stakeholders networking should become the sole focus of the EaSI strand, leaving the testing and implementation of social innovation to Member States under the shared management strand.

Stakeholders<sup>71</sup> also noted that the merger encouraged more communication between the Commission coordination units, reinforcing the link between the two strands. However, while generally appreciated by the stakeholders, the mechanisms for knowledge sharing are still not used to their full potential. About 70% of EaSI stakeholders that answered the survey are aware of the existence of NCPs in their countries (18 of 23 responses), and about 43% reported to have reached out to them (10 out of 23 responses). ESF+ managing authorities that replied to the survey, on the contrary, reported a much lower awareness of NCPs, with overall only 44% being aware of the NCP in their country (40 out of 91 responses) and 14% having reached out (13 out of 91 responses). The role of NCPs in fostering synergies between the two strands was praised by some stakeholders, recognising that NCPs can help connect project promoters with the European Commission, enhance access to information and opportunities, facilitate networking and learning, raise awareness of EaSI activities at the national level, and serve as a reference point for application support and partner searches.

The evaluation findings suggest that, so far, **the creation of a common legal basis did not lead automatically to more synergies between the previously separate funds. Nevertheless, more communication was observed between the two strands' stakeholders.** These strengthened links have led to enhanced exposure of relevant actors (particularly those involved in the shared management strand, e.g. managing authorities) to good practices and projects implemented under the EaSI strand.

The way in which Member States organise and allocate roles and responsibilities among the different players is also considered to affect the fund's capacity for synergies. Several interviewees and managing authorities survey respondents<sup>72</sup> mentioned that the diversity of actors involved in the EaSI strand and shared management strand, as well as the tendency to work in silos inherited from the previous programming period, are elements which limit the creation of synergies. For instance, the EaSI National Contact Points and the managing authorities are separate entities in most Member States<sup>73</sup>, hindering to some extent the effective dissemination of knowledge and good practices as well as opportunities

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<sup>71</sup>EC representatives, ESF+ Intermediate Bodies (HR), Ministries (HU), Members of the ESF+ Committee Government Rep (SE), Members of ESF+ monitoring committees (national level) (BE), National Contact Points (SE).

<sup>72</sup>A number of 27 interviewees: ESF+ beneficiaries (LT, PL), ESF+ Coordinating bodies (BG, RO), ESF+ Intermediate Bodies (FR, PL, PT), ESF+ MA (EL, FR), Members of the ESF+ Committee Government Rep (CZ, DE, IE, PL, SE), Members of the ESF+ Committee Workers' Rep (AT), ministries' (Units) working on ESF+ (EL), NCP (CZ, FR, IT, SI), EaSI beneficiary (direct) (ES, IT), Other (PL), Research/Academic institutions (PL), EC Representative.

<sup>73</sup>Only three countries have their EaSI strand National Contact Point within a Managing Authority, LT, PT and SE.

to upscale social innovations. While this separation is the result of different roles, status, scale, duration in office and set-up of the two types of actors, there is scope for further reinforcing their collaboration in terms of substance. For example, a good practice was reported by the Swedish National Contact Point that, differently from most Member States, sits within the country's ESF+ Managing Authority which was felt to have led to strong synergies between the ESF+ strands<sup>74</sup>.

As synergies between the shared management strand and the EaSI strand are expected mainly in the social innovation field, the next section analyses this issue in detail.

### *Synergies related to social innovation*

A tangible effect of the obligation under Article 14 to dedicate a priority axis to social innovation is the almost doubling of the allocation for social innovation under the shared management strand. In the current programming period, a total of EUR 1.78 billion have been allocated to priorities dedicated to social innovation and social experimentation for 2021-2027 (about 1.2% of the total shared management budget)<sup>75</sup>. This amount represents a substantial increase compared to the EUR 980 million<sup>76</sup> allocated to social innovation priority axes under the ESF 2014-2020<sup>77</sup>. Compared to the previous programming period, where only six Member States allocated funding to a social innovation priority axis (BE, CZ, DE, ES, HU, PL)<sup>78</sup>, under the current programming period, all Member States have programmed a specific priority to support social innovation<sup>79</sup>.

Most countries programmed only one priority for social innovation, while BE, DE, ES, FR and IT have programmed between 2 and 8 priorities ([Table K](#), Annex VI). However, there are significant differences in the amount allocated to the social innovation priority among Member States, ranging for instance from EUR 245 million in Germany (followed by France, Poland, Hungary, Spain and Italy) to EUR 0.4 million in Denmark. Four specific objectives account for nearly 82% of the total ESF+ social innovation priority allocation: SO.8 - Active inclusion and employability; SO.11 - Equal access to quality social and

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<sup>74</sup>The Swedish NCP is integrated within the national Managing Authority for ESF+, the Swedish ESF Council. The Council, created in 2000, is tasked with managing ESF+ for the 2021–2027 programming period but, as of 2022, it has also been serving as the EaSI National Contact Point. This dual role positions the Swedish NCP as a pivotal element in the synergies between the two strands of ESF+ in Sweden.

<sup>75</sup>Analysis of Social Innovation dedicated Priorities within ESF+ Programmes (2021–2027).

<sup>76</sup>ESF performance and thematic reports - The ESF support to social innovation. Available at: <https://siplus.at/wp-content/uploads/2022/01/Brodolini-THE-ESF-SUPPORT-TO-SOCIAL-INNOVATION.pdf>.

<sup>77</sup>It should be noted that both values represent an underestimation of the amount actually allocated by Member States to social innovation. The values are calculated based on whether the Member States specifically dedicated a priority axis (for the period 2014-2020) or a priority (for the period 2021-2027) to social innovation. However, it is possible that social innovation is also covered by other priority axes/priorities but not captured by the data.

<sup>78</sup>ESF performance and thematic reports - The ESF support to social innovation. Available at: <https://siplus.at/wp-content/uploads/2022/01/Brodolini-THE-ESF-SUPPORT-TO-SOCIAL-INNOVATION.pdf>.

<sup>79</sup>For LV, MT and SI no data on policy area distribution are available. Using data from Cohesion Data, if the filter 'policy area' is used, those three countries report no allocation for Social Innovation. In order to align all countries, for LV, MT and SI, data have been taken from ESFA report available here: <https://www.esf.lt/data/public/uploads/2024/03/annex-3-analysis-of-social-innovation-priorities.pdf>.

healthcare services; S.12 - Social integration of people at risk; and S.1 - Access to employment and activation measures for all.

The type of measures included under the social innovation priority can vary considerably between Member States programmes in terms of approach, activities, and target groups. Some measures are described broadly, aiming to develop an ecosystem favourable to social innovation or to create partnerships between public authorities, the private sector and civil society. Several measures are also intended to support the activities of the National Competence Centres. Some Member States (Denmark, France, Czech Republic, Ireland, Netherlands, Italy and Spain) also include social experimentation activities under the SI dedicated priority.

The focus groups participants<sup>80</sup> highlighted that the higher co-financing rate for social innovation in the shared management strand allows for higher flexibility and more opportunities for testing new approaches that would be otherwise not possible. The analysis of the ESF+ programmes reveals that while they refer to social innovation (in line with Article 14), there is no direct reference to the EaSI strand projects and to their potential for upscaling<sup>81</sup>. This could signal that Member States have not yet envisaged upscaling good practices experimented under the EaSI strand. An exception is the French National ESF+ Programme ‘Employment for Inclusion – Youth – Skills’<sup>82</sup> that explicitly envisages the upscaling of social innovation projects tested under the EaSI strand of the ESF+.

Interviewed policymakers from CY, EE, EL, ES, IE and SE think that the dedicated priority to social innovation could be effective in increasing the appetite for social innovation at the national level. At the same time, the majority of the ESF+ managing authorities which responded to the study’s dedicated survey, did not report scaled-up projects developed under the EaSI strand or plans to do so (Figure 5 below).

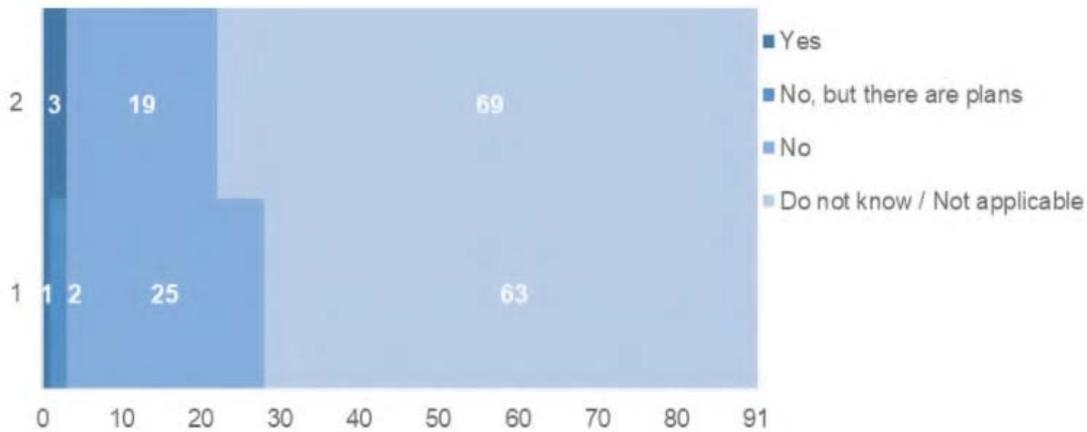
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<sup>80</sup>Two focus groups were conducted during the study supporting the mid-term evaluation: one with EaSI strand stakeholders and another with shared management strand stakeholders.

<sup>81</sup>Based on the results of the national desk research and the analysis of a sample of national programmes.

<sup>82</sup>See [https://fse.gouv.fr/sites/default/files/2023-10/ProgrammeFSE\\_A4.pdf](https://fse.gouv.fr/sites/default/files/2023-10/ProgrammeFSE_A4.pdf).

**Figure 5 – Number of managing authorities intending to up-scale EaSI social innovation projects<sup>83</sup>**



Source: Survey of ESF+ managing authorities (Ecorys consortium, 2025)

**Synergies on social innovation on the national level might be limited by the programming cycle of ESF+ programmes under shared management.**<sup>84</sup> While Member States have to decide on which priorities to focus on at the beginning of the programming period, the first EaSI strand projects funded are likely to terminate in 2024. Thus, shared management stakeholders must wait for first results of EaSI strand projects (funded under the current programming period) to understand which practices could be scaled up in the context of the set national priorities. Nevertheless, 12 Member States earmarked resources to transfer or scale up the results of the projects awarded under the ALMA call for proposals as part of the Social Innovation Plus Initiative<sup>85</sup> (see more details on the ALMA types of activities in [Box 1](#), Annex VII). According to the Member States representatives and European Commission officials interviewed, the short implementation timeframe of ALMA (6 to 18 months), its prominence in the European Commission’s priorities, and the decision to program it in the national programmes under shared management prior to their approval were among the key factors facilitating its integration under the shared management.

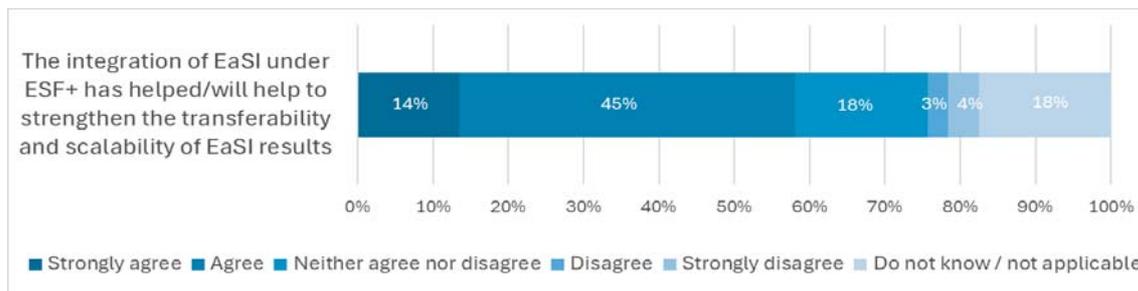
Transferability and scalability of EaSI social innovations to the shared management strand was the main goal of the merger of ESF and EaSI with the creation of the different mechanisms supporting the collaboration among stakeholders. As shown in Figure 6 below, almost 60% of EaSI stakeholders that answered the survey (43 of 74 responses) agreed that the integration of EaSI under ESF+ helped to strengthen the transferability and scalability of EaSI results.

<sup>83</sup>Line 1 of the Figure 5 presents the MAs intentions to introduce changes in the programming and implementation of the shared management strand to up-scale EaSI strand projects (N=91). Line 2 of Figure 5 presents the MAs intentions (including those already materialised) to transfer or up-scale EaSI strand projects under the shared management strand within Member States (N=91).

<sup>84</sup>ESF+ beneficiaries (AT, EE, HR, IE), ESF+ Intermediate bodies (PL), ESF+ Coordinating bodies (RO), Members of the ESF+ Committee Workers' Rep (BG, ES, PL), Members of the ESF+ Committee Employer Rep (SE), Members of the ESF+ Committee Government Rep (CY, EL), EU-level interview (European Commission representative), ministries' (units) working on ESF+ (IE).

<sup>85</sup>ALMA is the first call for proposals launched by ESFA under the EaSI strand indirect management (see <https://european-social-fund-plus.ec.europa.eu/en/how-to-make-alma-work>).

**Figure 6 - EaSI stakeholders' view on the effect of the merger on the transferability of EaSI results to the shared management strand**



Source: EaSI strand stakeholders survey (ESF+ mid-term evaluation supporting study, Ecorys, 2025)

Under direct and indirect management, the EaSI strand has launched several calls for proposals focusing on social innovation (see [Table X](#), Annex VII). Under indirect management, the Social Innovation Plus Initiative also facilitates knowledge sharing and mutual learning within five Communities of Practices (CoPs)<sup>86</sup>, two networks<sup>87</sup> and one online database (Social Innovation Match SIM)<sup>88</sup>. The core members of the CoPs and networks are the ESF+ managing authorities, NGOs, social partners and other interested stakeholders (see Figure 3 in [Annex VII](#) representing the Social Innovation Plus Initiative intervention logic).

Under the shared management strand, there are positive signals confirming the potential for synergies in the area of social innovation. Besides an increased amount dedicated to priorities focusing on social innovation compared to the previous period, there is an overall good level of awareness and use of the EaSI strand activities (notably the Social Innovation Plus Initiative<sup>89</sup>) by the managing authorities. According to the results of the managing authorities' survey, all these activities help them exchange knowledge, build partnerships and competences, networking as well as stay up to date and align their work with EU priorities.

However, it is difficult to ascertain the contribution of the ESF+ new incentives and mechanisms to the transfer and scaling-up of innovative solutions under shared

<sup>86</sup>The five Communities of Practice are (1) Social Innovation; (2) Social Inclusion; (3) Employment, education and skills; (4) Material deprivation; and (5) Migrant integration.

<sup>87</sup>The two networks are ALMA network (<https://www.socialinnovationplus.eu/network/alma/>) and EURoma network (<https://www.euromanet.eu/>).

<sup>88</sup>Social Innovation Match (SIM): <https://socialinnovationplus.eu/social-innovation-match-sim/>. Social Innovation Match (SIM) is an online tool to network of innovative initiatives and organisations across Europe. It provides examples as a source of inspiration (currently more than 240 case studies at local/regional/national and EU-level funded from public, private and EU sources). Project promoters can contribute by uploading their initiative or organisation profile directly to the database, before their validation by a SIM validator.

<sup>89</sup>As shown by the map of social innovation ecosystems enhanced through the implementation of the Social Innovation Plus Initiative (<https://socialinnovationplus.eu/transnational-calls/>).

management due to its short implementation period. A negative unintended effect of the merger of the former ESF and EaSI, which emerged from the stakeholders' consultation, consists in an increase of the perceived complexity of the overall ESF+ social innovation scheme (see also the section on efficiency).

The study supporting the ESF+ mid-term evaluation identified several challenges that appear to be beyond the ESF+ influence. Key issues revealed include Member States' hesitance to invest in social innovation operations due to competing national or political priorities and constrained national budgets, difficulties in adapting social innovation projects within the regulatory framework of shared management, low levels of awareness and dispersed responsibilities regarding social innovation in public administrations.

Interviews with the operational units responsible for implementing calls for proposals under the current EaSI strand and ESFA, highlight additional challenges for transfer/scale-up projects (see detailed information in [Box 2](#), Annex VII). Among these factors, the lack of convincing impact evaluation methods (e.g. counterfactual impact evaluation or equivalently robust evaluation methods) hinders a rigorous analysis and interpretation of the social experimentation results as regards their up-scaling potential. All these factors could potentially contribute to difficulty in transferring and scaling up innovative solutions under shared management.

Once social innovations projects have been implemented and fully tested under the EaSI strand, it will be possible to assess concretely whether the mechanisms in place are indeed conducive to more synergies, leading to an effective scale-up and transfer of social innovations to shared-management strand. At the same time, the social innovation mechanisms under ESF+ could already benefit from some improvements. Notably, managing authorities from the shared management strand highlighted the need to prioritize practical applications compared to theoretical examples and to prioritise in demand-driven topics compared to broader approaches.

For demonstrating the merger's impact on the ability to scale up under the shared management strand of the innovative solutions developed under the EaSI strand, a ratio between the number of up-scaled projects/number of social experimentations (based on the current KPI3) will be used in the future evaluations.

#### *Social inclusion and support to the most deprived*

In the area of social inclusion, the evaluation analyses the effects of the merger of ESF and FEAD and the thematic concentration requirements.

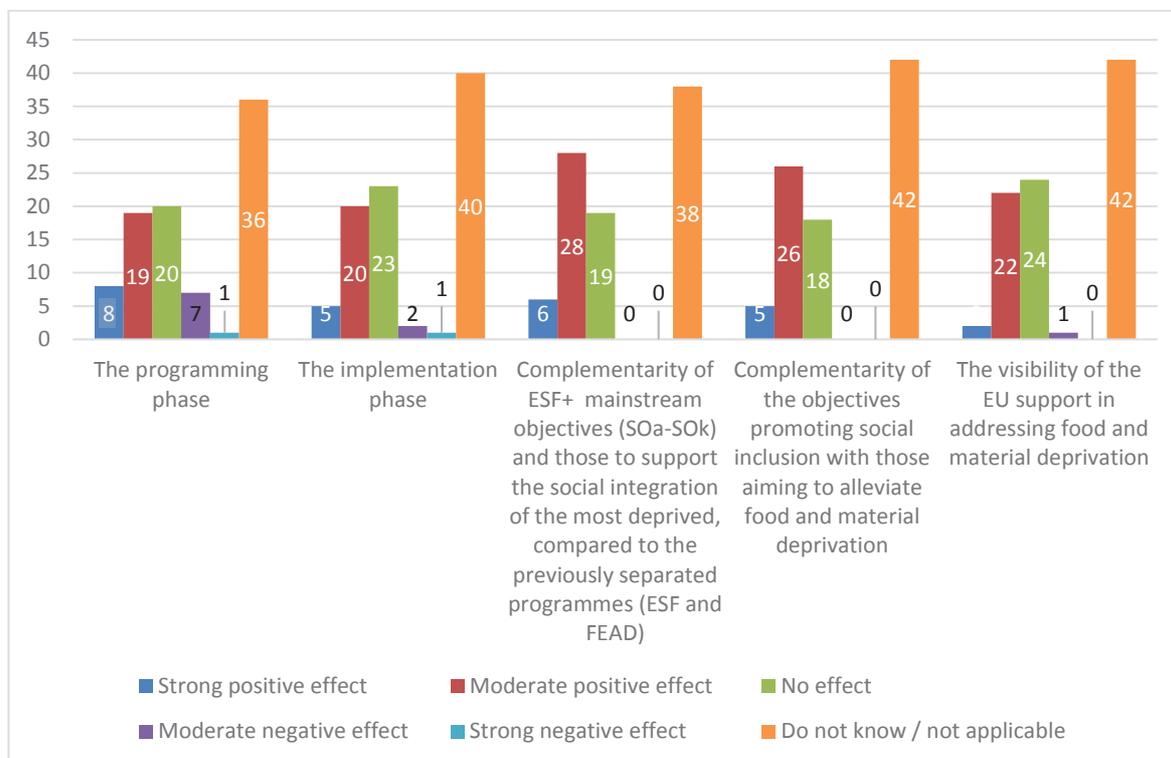
Evidence from the study supporting the evaluation shows that **the mainstream shared management strand Specific Objectives (a-k) and the Specific Objectives to support the social integration of the most deprived (l) and to combat material deprivation (m) complement each other better overall than the former ESF and FEAD but that the potential for complementarity has not been fully maximised and the effects at the level of participants are not evident yet.**

The results of the survey with the ESF+ managing authorities (Figure 7) show that the answer given most often was "I don't know". A small majority of the respondents who expressed their opinion thought that the merger of ESF and FEAD had (moderate or strong) positive effects while almost half of them did not see any effects of the merger. This might

suggest that it is too early for those effects to emerge (the question on implementation) but also that no particular changes were made by the concerned Member States at the level of programming following the merger.

**Figure 7 - Effects of the merger of ESF and FEAD (N=91)**

**What effect did the merger of ESF and FEAD have on the following:**



Source: Survey of the ESF+ managing authorities (ESF+ mid-term evaluation supporting study; Ecorys, 2025)

As Table 9 below shows, the majority of Member States (19) dedicated a priority to the most deprived (SO(l) or SO(m)) within national/regional programmes implementing mainstream shared management SOs of the ESF+. France has dedicated both a specific national programme and a priority of another national programme to SO(m), while Portugal has dedicated one priority to SO(m) within three different regional programmes.

**Table 9 – Approach to programming of support to the most deprived under SO(l) and SO(m)**

Approach to programming of support to most deprived	Country
National Programme dedicated to most deprived	AT, BE, BG, ES, FR, LT, LV, PL, SI
National Programme with a specific priority on the most deprived	CY, CZ, DE, DK, EE, EL, FI, FR, HR, HU, IE, IT, LU, MT, NL, RO, SE, SK
Regional Programme with a specific priority on the most deprived	PT

Source: analysis of programming documents ESF+2021-2027 (ESF+ mid-term evaluation supporting study; Ecorys, 2025)

Lack of programming for the most deprived at the regional level was one of the issues raised in the consultations. In response to the call for evidence for the evaluation, a Spanish NGO representing Roma highlighted that there was a missed opportunity to increase the use in ‘regional programmes of the opportunities offered by the ESF+ to address the situation of groups/people in situations of greater exclusion and vulnerability, such as the Roma’<sup>90</sup>. This was similarly echoed by a regional authority in Sweden that stated that the participation of local and regional authorities has been limited to date in the ESF+, with this having a negative effect on the achievement of regional goals to reduce the number of people at risk of poverty or social exclusion<sup>91</sup>.

**Management of the different types of operations by one managing authority was found to increase the potential for synergies between the mainstream shared management strand specific objectives (a-k) and those to help the social integration of the most deprived (l) and to combat material deprivation (m).** In Malta, ministry representatives highlighted that the collaboration and synergy between ESF and FEAD-type support have been strengthened as ‘FEAD is not treated as a standalone initiative but is considered complementary to the broader strategies implemented by the ministry, especially in areas concerning children and social initiatives’. In Greece, FEAD-type support has been programmed as a specific priority in the Human Resources and Social Cohesion programme. Ministry representatives responsible for the ESF+ in Greece held the view that, at least at programming stage, this integration has led to improved synergies between the two types of support, through allowing, for example, target groups of SO(m) to be better linked to actions related to the Youth Guarantee under other SOs. A greater potential for complementarity was also reported by stakeholders in Italy, with the integration of SO(m) within the new ESF+ programme expected to help overcome problems encountered in the previous period related to a lack of strategic planning and administrative difficulties with the transition of participants from one authority to another and to allow a better focus of support and increased complementarity with other active labour market measures.

**Little impact is seen in terms of increased complementarities between the mainstream shared management strand specific objectives (a-k) and those to help the social integration of the most deprived (l) and to combat material deprivation (m) in the nine Member States that have programmed SO(m) as a separate national programme.** In Belgium for example, the choice to programme SO(m) separately is seen by national stakeholders interviewed (members of the ESF+ committee as well as representatives of the Wallonia and Flanders ESF+ MAs) as one that replicates the previous FEAD programme - the merger of the FEAD into ESF+ is thus seen as having a ‘strictly budgetary’ influence. Similar views were also shared by ministry representatives from Lithuania and Latvia where SO(m) is a separate standalone programme<sup>92</sup>. They

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<sup>90</sup>[Feedback from: Fundación Secretariado Gitano \(FSG\) \(europa.eu\)](#)

<sup>91</sup>[Feedback from: City of Gothenburg \(europa.eu\)](#)

<sup>92</sup>In Lithuania, the Programme for addressing material deprivation (2021LT05SFPR001), see: [Programa | Materialinio nepritekliaus mažinimo programa](#); in Latvia, *Eiropas Sociālā fonda Plus programmas materiālās nenodrošinātības mazināšanai 2021.–2027. gada plānošanas perioda vadības likums* [Law on

reported that ‘synergies are not visible’ between SO(m) support and other ESF+ measures. Belgian stakeholders (ESF+ managing authority, former FEAD managing authority, and members of the ESF+ Committees (trade union representatives and regional government)) also reported that the merger has in fact had a detrimental impact on support to the most deprived, as the programming is no longer focused and tailored to material deprivation, losing a tailored performance and auditing framework as well as the potential for mutual learning on implementation issues specifically to material deprivation. This latter point also emerged in focus group discussions with managing authorities and partner organisations of the former FEAD, who highlighted the noticeable absence since the merger, of a forum for mutual learning specifically dedicated to food and basic material assistance and supporting the most deprived (as had been the case with the FEAD Network and FEAD Community in the 2014-2020 programming period)<sup>93</sup>.

One of the arguments presented in the ESF+ impact assessment for the merging of FEAD into the ESF+ is that that FEAD did not allow the delivery of social inclusion measures (OP II) alongside food and basic material assistance (OP I): ‘Member States implementing only social inclusion activities under FEAD see a need to also deliver material aid in order to alleviate immediate needs of the end recipients. This is not however possible under the current OP differentiation’<sup>94</sup>. Analysis of the financial allocations to SO(I) and SO(m) (see [Table L](#), Annex VI) shows that no Member State has programmed support under SO(m) as well as support to the most deprived specifically under SO(I)<sup>95</sup>. Member States have largely chosen to dedicate financial resources to the most deprived in the same way as the former FEAD. This is seen for example in the fact that three (of the four) Member States (DE, DK, SE) that implemented OP II under the former FEAD have not programmed SO(m), focusing some of their resources under SO(I) to the most deprived. The Netherlands is the one country from the former FEAD OP II-implementing countries that changed its approach to supporting the most deprived, as it introduced measures focusing on food support under ESF+ SO(m).

The financial resources specifically dedicated to supporting the most deprived under the ESF+ have increased in comparison to resources under the former FEAD. This can be seen when comparing the total financial allocation to SO(m) (exclusively targeting the most deprived) plus the resources addressing the most deprived under SO(I)<sup>96</sup> to the total

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the management of the ESF+ Programme for Addressing Material Deprivation 2021-2027], see: <https://likumi.lv/ta/id/332212-eiropas-sociala-fonda-plus-programmas-materialas-nenodrosinatibas-mazinasanai-20212027-gada-planosanas-perioda-vadibas-likums>.

<sup>93</sup>Ecorys, *Study supporting the mid-term evaluation of the ESF+ during the programming period 2021-2027*, 2025.

<sup>94</sup>Impact assessment for the ESF+: [eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018SC0289](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018SC0289)

<sup>95</sup>This is based on data from the Cohesion database whereby the filter ‘priority type description’ was used to identify allocations under SO(I) that have been specifically identified by Member States as ‘*supporting the most deprived*’.

<sup>96</sup>Regarding SO (I) in the 2021-2027 programming period, only resources addressing the most deprived are considered. To capture the amount directly addressed to most deprived, we used “Priority Type Description” variable as a filter. As set by the Article 2(1)(6) of the ESF+ regulation: “Most deprived persons” means natural persons, whether individuals, families, household or groups of persons, including children in vulnerable situations and homeless people, whose need for assistance has been established according to the objective criteria which are set by the national competent authorities in consultation with relevant

allocations to former FEAD programmes, including additional REACT-EU. As outlined in [Table L](#), Annex VI, through ESF+, EUR 5 billion are allocated to SO(m) and to the social integration of the most deprived specifically under SO(l). This is 11.26% higher than the amount allocated to FEAD and REACT-EU (EUR 4.5 billion) under the previous programming period. Considering FEAD exclusively (EUR 3.8 billion), resources in the current programming period increased by 31.3%. Eighteen countries have a higher allocation to the most deprived under these two objectives than they had through their former FEAD programmes<sup>97</sup>.

Stakeholders in some of these countries (e.g. ministry representatives in CY and EL) held the view that this increase of resources to FEAD-type support under ESF+ had a positive impact of the merger of FEAD type support into the ESF+. However, stakeholders from some of the nine countries<sup>98</sup> where allocations did reduce in comparison to FEAD considered that this reduction was in part brought on by the merger. In Latvia, where resources for the most deprived reduced by 33.5%, a ministry representative held the view that this reduction was due to the merger of FEAD into ESF+ as they now have to compete with other areas of support, to justify the needs of the most deprived at national level. In Luxembourg, where resources dedicated to the most deprived under SO(l) and (m) decreased by 73.8% compared to the former FEAD and REACT-EU, managing authority representatives also raised the challenge of ‘competing’ for different policy priorities.

Overall, the differences in allocations are much lower in real terms ([Table M](#), Annex VI). After adjusting the values to constant prices to account for inflation<sup>99</sup> in the 19 countries which increased their allocation both in nominal and real terms, at the same time the allocation per capita was far higher than in the past ([Table N](#), Annex VI), suggesting that these countries might have aimed at intensifying the support for the most deprived people.

**Thematic concentrations were identified as an important factor ensuring funding is allocated for support to vulnerable groups.** A trade union member of the ESF+ monitoring committee in Spain, for example, stated that ‘without setting a minimum level of funding for the most disadvantaged groups, funding could be dispersed, for example, according to territorial priorities’. Similarly, in Bulgaria, employer representatives on the ESF+ monitoring committee mentioned the relevance of the increased focus on poverty and social exclusion in the ESF+ intervention logic. The thematic concentration requirement on social integration and support to the most deprived was highlighted as particularly relevant.

**The thematic concentration on the most deprived is thus particularly important in ensuring that Member States continue to prioritise funding and actions for this group,** that may not so easily fall into typical ESF active labour market measures. The share of total allocation dedicated to material deprivation (5,3%) is higher than the

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stakeholders avoiding conflicts of interest, and which may include elements that allow for targeting of the most deprived persons in certain geographical areas”.

<sup>97</sup>BG, CY, CZ, DE, EE, FI, FR, EL, HR, HU, IE, LT, MT, NL, PL, PT, RO, SE.

<sup>98</sup>AT, BE, DK, ES, IT, LU, LV, SI, SK.

<sup>99</sup>The values have been adjusted through the annual average of the Harmonised Index of Consumer Prices (base year 2015) provided by Eurostat, by considering the real prices in 2014 for FEAD, in 2020 for REACT-EU and 2021 for ESF+ ([https://ec.europa.eu/eurostat/databrowser/view/prc\\_hicp\\_aind/default/table?lang=en&category=prc.prc\\_hicp](https://ec.europa.eu/eurostat/databrowser/view/prc_hicp_aind/default/table?lang=en&category=prc.prc_hicp)).

minimum requirement of 3%. However, as many as eight MS (CZ, DE, DK, EE, HU, PT, SE, SK) decided to stick to the required minimum (see [Table O](#), Annex VI). For social inclusion all Member States exceeded the minimum requirement to allocate 25% of their ESF shared management resources which resulted in overall share of allocation for this policy area at 31.5% (or EUR 29.9 billion, which is an increase comparing to 24.9 billion in the 2014-20 programming period). In two Member States (SE and IE) the allocations for social inclusion surpassed 50% of their total ESF allocations.

Few examples of the effect of the merger of the former FEAD with the ESF on the end recipients were identified to date. The majority of interviewees stated that implementation is not enough advanced to identify such synergies. However, almost half (25 out of 51 or 49%) of the managing authorities who replied to the question on implementation in the survey thought that the effects were positive. As an example, a ministry representative from Malta highlighted that the transformation of FEAD into an operation funded through the ESF+ programme has provided the ministry with increased flexibility in terms of design and has allowed for an expansion towards reaching a wider cohort of most deprived persons. The anticipated outcome is that the ultimate recipients of the operation will be seven times as many as those who benefited from the FEAD programme during the 2014-2020 programming period.

**Creating synergies for participants between the mainstream shared management strand Specific Objectives (a-k) and those to support the most deprived (l-m) requires concerted efforts.** Little evidence was found of such efforts yet, with only one clear example from Estonia. In Estonia, a ministry representative highlighted that, along with food aid, other welfare services are offered to recipients, which is in practice supported by comparing the personal codes of food aid recipients with the personal codes of ESF+ mainstream shared management support recipients. Managing authority representatives from Estonia confirmed that this has resulted in 40% of food aid recipients receiving services from another ESF+ project.

#### Support to employment of young people

In the area of support to employment of young people the evaluation analyses the effects of the **merger of ESF and YEI and the thematic concentration requirement**. Support to youth employment has been integrated in ESF+ under SO(a) ‘improving access to employment and activation measures for all jobseekers, in particular young people, especially through the implementation of the Youth Guarantee, for long-term unemployed and disadvantaged groups on the labour market, and for inactive people, as well as through the promotion of self-employment and the social economy’. The targeted funding (YEI provided support to young people living in regions where youth unemployment was higher than 25%) was replaced by the requirement set in Article 7 of ESF+ regulation, obliging Member States with a rate of young people aged 15 to 29 not in employment, education or training (NEET) above the EU average for the years 2017-2019 to devote at least 12.5% of their ESF+ resources to youth.

**The thematic concentration requirement for youth resulted in the same amount of financial resources, programmed for the areas where the problem of NEET was the most critical, under the ESF+ shared management strand as under YEI (almost EUR**

**9 billion)**<sup>100</sup>. Regions in 20 Member States were eligible for YEI funding whereas 10 Member States are obliged to fulfil the thematic concentration for young. With the 12 other Member States investing in ‘youth employment and socio-economic integration of young people’ the total amount is almost EUR 11 billion.

**Consultations at EU and national level showed generally positive feedback on the integration of the former YEI under the ESF+.** According to 20 of the interviewed national-level stakeholders representing national ministries, ESF+ monitoring committees, ESF+ managing authorities, ESF+ monitoring committees from several Member States (e.g. BE, BG, ES, EL, HR, IE, LT, PL, RO), as well as 15 of the open responses to the MA survey, **clear advantages of the merger included more streamlined and simplified management processes, greater flexibility in transferring funds depending on changing needs, and a more streamlined approach to implementation.** These positive effects correlate with the reduced number of programmes and programmes’ priorities (as YEI was integrated into the specific objective a) on access to employment) as well as reduced number of indicators that need to be monitored and reported<sup>101</sup> (see also analysis of efficiency).

**The positive impacts of the merger were often linked to strong complementarities between ESF and the YEI in the previous programming period (2014-2020).** These links were noted both in terms of target groups (young people not in employment, education or training) and areas of action (employment support). In Spain, for example, interviewed stakeholders from the ESF+ monitoring committee mentioned that, even in the previous programming period, both ESF and the YEI were managed by the same managing authority, with the merger representing an opportunity for further simplification.

Furthermore, interviewed stakeholders from the ESF+ managing authorities in Ireland and Greece perceived the merger as an opportunity to harmonise approaches to youth employment support, both within individual countries and across Member States. The overall positive impact of the YEI-ESF merger was also highlighted in the MAs survey outcomes (Figure 8), as majority of those who responded noted that the merger had a strong or moderately positive effect on the programming (74%, or 47 out of the 63 who replied to this question) and implementation of the ESF+ (67%, or 39 out of the 58 who replied to this question), as well as on complementarity with the rollout of the Youth Guarantee (68% or 41 out of 60 who replied to this question).

It is worth identifying as a potential unintended effect that, while a minority, five national-level consultees from ESF+ MAs, as well as survey respondents, noted that the lack of a separate funding stream with no co-financing rules for Member States is likely to result in less visibility and less funding made available for the implementation of the Youth Guarantee, which may affect support in countries with high levels of youth unemployment (e.g. Spain).

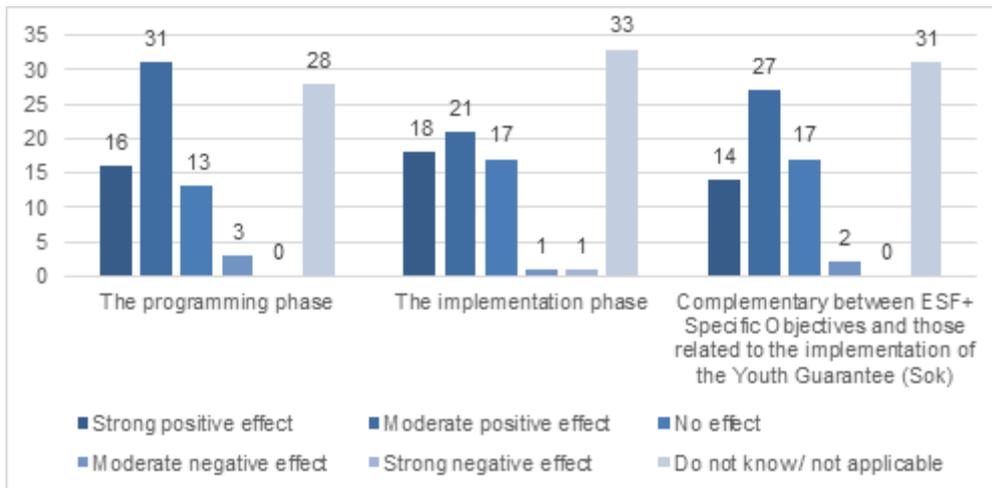
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<sup>100</sup>‘Cohesion 2021-2027: forging an ever stronger Union’ - Report on the outcome of 2021-2027 cohesion policy programming (SWD(2023) 134 final): [InfoREGIO - Report on the outcome of 2021-2027 cohesion policy programming](#)

<sup>101</sup>Annex II of ESF Regulation included 12 YEI result indicators which had to be monitored and reported in addition to the indicators applicable to ESF operations.

**Figure 8 - Effects of the merger between ESF and the YEI**

**What effect did the merger of ESF and YEI have on the programming and implementation phases of ESF+, and on its complementarity with the Youth Guarantee? (N=91)**



Source: Survey of ESF+ managing authorities (ESF+ mid-term evaluation supporting study, Ecorys, 2025)

### Enabling conditions

**Enabling conditions<sup>102</sup> intend to ensure that the necessary conditions for the effective and efficient use of the Funds are in place.** These conditions are, for instance, policy frameworks that support the ESF+ investments, ensuring that they are of high quality and in line with standards commonly agreed by Member States at EU level. There are thematic (applicable to a specific objective) and horizontal (applicable to all specific objectives) enabling conditions. To guarantee that the policy conditions for the investments' effectiveness and efficiency are in place, no expenditure is reimbursed from the Union budget until the Commission assesses that enabling condition relevant to the spending's specific objective as fulfilled. In the 2021-2027 programming period, the enabling conditions were streamlined and their number reduced as compared to the previous period (called 'ex-ante conditionalities' in the 2014-2020 programming period). At the same time, their fulfilment is monitored and checked throughout the whole programming period and not only at the beginning.

**Survey and interview evidence from the supporting study suggests that the enabling conditions have been effective in achieving their objective: ensuring the prerequisites necessary for effective and efficient use of Unions funds.** In some countries (e.g. EL, FI, HR, HU, LT, PL, RO), not all enabling conditions were fulfilled at the time of programme decisions and were fulfilled at a later stage. Consequently, the enabling conditions contributed to real changes as these countries established the necessary general or sectorial frameworks. Results from the survey of managing authorities indicate that a significant proportion of respondents (45, or 49% of respondents) agree with the statement that both (thematic and horizontal) enabling conditions led to national regulatory frameworks that are more conducive to effective investments in line with EU policies. Only 12 respondents

<sup>102</sup>Article 15, CPR Regulation. See also [Annex VII](#) and footnote 33 of this document.

(13%) disagreed with this statement. There is also evidence from the national-level documents in some countries that enabling conditions have likely led to structural investments further to the implementation of the measures of the related strategic documents (e.g. BG, DK, EE, ES, HU, MT, PT, RO, SE). This is also supported by the outcomes of the survey of the managing authorities where 32% agreed (and 20% disagreed) with the statement that ‘Enabling conditions (both horizontal and thematic) are leading to structural investments’. Interview evidence further shows that, in the majority of Member States, enabling conditions were regarded as an important factor shaping national regulatory and policy frameworks, fostering an environment conducive to EU-aligned investments (e.g. BE, BG, ES, HR, HU, IT, LT, MT, PL, PT, RO). The enabling conditions also guided the implementation arrangements and project selection (e.g. BE, BG, CY, DK, ES, IT, LT) and helped raising awareness. The vast majority of interviewees supported regular monitoring of the fulfilment of enabling conditions. In response to Call for Evidence, the European Disability Forum also expressed support for the inclusion of the enabling conditions within the CPR.

**Horizontal enabling conditions were effective in ensuring that minimum standards in programme implementation are in place.** The majority of respondents (52% or 48 out of 91) from the survey of the managing authorities agree with the statement that horizontal enabling conditions help foster the effective and efficient use of ESF+, while only 19% (17 out of 91) disagree. According to stakeholder interviews, these conditions are recognized as relevant in preventing irregularities in the implementation of the Fund. The horizontal enabling conditions have also acted as catalysts for reforms. For example, the horizontal enabling conditions concerning the implementation of the Charter of Fundamental Rights have encouraged some Member States to implement reforms in the area of judicial independence and discouraged policy action that ran counter to the EU’s acquis. In some Member States (BG, PT, RO) enabling conditions triggered changes in public procurement legislation. Many stakeholders (from CZ, ES, EL, PT, MT) also mentioned the focus of enabling conditions on ensuring compliance with the UN Convention on the Rights of Persons with Disabilities and the effect this has on ensuring that projects conform to international standards on accessibility and inclusion. However, in about half of the Member States, there is a view that horizontal enabling conditions have not significantly contributed to avoiding the irregularities, as relevant measures were already in place.

**Thematic enabling conditions were effective in having an impact on the formulation of public policies that are conducive to Union support.** The survey of managing authorities shows that the same percentage of respondents as for horizontal enabling conditions (52% or 48 out of 91) agree with the statement that thematic enabling conditions help foster the effective and efficient use of ESF+, with 19% (17 out of 91) disagreeing. In some Member States (e.g., DK, ES, FI, FR, IE, LT, LV, SE, SK) the thematic enabling conditions did not lead to substantive changes because the relevant policy frameworks were already in place before programming. Interviewees who agreed that the thematic conditions were effective highlighted that these conditions have prompted changes in national legislation and policies to bring them in line with EU priorities. For example, in Malta, enabling conditions have led to the development of new implementation approaches to better address policy objectives. This includes the design of an occupational forecasting tool that was implemented in the drafting of the Employment Policy 2021-2030 and

preparation of the Gender Equality and Mainstreaming Strategy and Action Plan for the period 2022-2027. Other examples include the development of new strategic framework for education in Bulgaria, the development and quicker adoption of a strategic plan for social inclusion of people with a disability in Belgium and Ireland, and collaboration between ministries to develop a joint action plan for long term care in Greece. However, in

## Efficiency

### *Shared management*

**The ESF+ implementation under shared management is not sufficiently advanced to compare the costs and benefits of operations.** This section will thus analyse the administrative costs of the management of the ESF+, and the cost reduction potential of the simplification measures introduced in the 2021-2027 programming period. Whenever possible, the impact assessment is used as point of comparison.

**Estimates suggest that growth of administrative costs at the beginning of the period outpaced the overall growth of spending, but the ratio is expected to decrease as implementation progresses.** A survey<sup>103</sup> asked the programme authorities to estimate administrative costs for the entire period by fund and by task, starting from the preparation phase in 2020 until after 2029. The survey also inquired about the evolution of administrative costs over time. Responses were received from 39 ESF+ programmes and 72 multi-fund programmes, of which 57 also included ESF+. The results for the remaining programmes were imputed<sup>104</sup>. By the end of 2024, the total estimated administrative costs for programme authorities constitute EUR 471 million<sup>105</sup> for the ESF+ programmes. For the same period, the respective costs for multi-fund programmes reached EUR 1.75 billion, with the ESF+ share assessed at EUR 312 million<sup>106</sup>. Thus, the total administrative costs for programme authorities managing the ESF+ are estimated at EUR 782 million by the end of 2024. For the entire programming period, based on the same methodology, the total amount of administrative costs is estimated to be EUR 2.9 billion.

As a proportion, the estimated administrative costs by the end of 2024 accounted for 27% of the total estimated costs for the entire programming period. As a comparison, the eligible expenditure declared by beneficiaries amounted to 7.6% of the allocations. This pattern of

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<sup>103</sup> Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*, forthcoming. In this study the respondents were asked to reply about the administrative costs for the entire period (until 2029) and about the distribution of these costs. Thus, the estimates of the averages partly refer to the costs already incurred and partly anticipated costs.

<sup>104</sup> Missing data was imputed using k-nearest neighbourhood method. For more details see [Annex II](#) and the study.

<sup>105</sup> The cost estimates are based on internal DG REGIO estimates based on the raw data of the study: Ramboll, 'Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027' (see [Annex II](#) on methodology)

<sup>106</sup> Assuming that the share of the administrative costs for the ESF+ in the multi-fund programmes equals the share of ESF+ allocations (18%) in the multi-fund programmes. Total allocations (EU and national financing) amount to EUR 297 bn for the multi-fund programmes out of which ESF+ allocations is EUR 53 bn. Total allocations for the ESF+ programmes are EUR 89 bn.

administrative costs outpacing spending in the beginning of the period is consistent with the previous period, when by 2016, administrative costs amounted to 22% of the total administrative costs of the period, while spending across all ESIF funds was only 5%<sup>107</sup>. This is because many types of administrative costs are frontloaded. Tasks<sup>108</sup> such as drafting Partnership Agreements, preparing programmes, setting up management and control systems, designating authorities and ensuring ex-ante conditionalities are more concentrated at the beginning of the period when implementation is low. Although certain types of costs (such as financial management, controls, audits, monitoring, selection of operations) become more significant at a later stage, overall spending increases at a faster rate. Estimates<sup>109</sup> suggest that, in relative terms (costs per million euro spent), administrative costs are expected to decrease as implementation progresses.

**Estimates suggest that the overall administrative costs of managing the ESF+ are expected to remain low for programme authorities.** The survey data indicate that by the end of the period (2020 until after 2029)<sup>110</sup> the weighted average of administrative cost over the total budget (sum of all administrative costs divided by the total funds' budget) for programme authorities will be EUR 19,652 per million spent (unweighted programme average: EUR 35,640). The corresponding figure for multi-fund programmes is EUR 21,754 per million spent (unweighted programme average: EUR 29,982). The budget weighted average is significantly lower than the unweighted average, and this implies that programmes with smaller budgets have disproportionately higher administrative costs. The median programme costs (at EUR 18,625 for ESF+ programmes and EUR 27,309 for multi-fund programmes) are lower than unweighted averages, suggesting that there are few outliers (programmes with significantly higher costs) which influence the average values.

Thus, the administrative costs for the programme authorities fall in the range of EUR 18,625 to EUR 35,640 per million spent corresponding to 1.9-3.6% of total spending. The administrative costs for the programme authorities are below 4% of total spending, which is generally not regarded as excessive<sup>111</sup>. Based on the results of a survey of programme authorities of 483 programmes (all CPR funds, not only ESF), the highest category of costs for the whole period is related to 'operations' (median cost of EUR 6,594 per million spent), which includes the selection of operations, information provided to beneficiaries, management verifications, and on-the-spot verifications. General management, with a median cost of EUR 3,131 per million spent, is the second-highest category. This covers expenses related to setting up systems for data collection and storage, establishing

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<sup>107</sup> The estimates are based on the raw data of the study: European Commission: Directorate-General for Regional and Urban Policy, Spatial Foresight and t33, New assessment of ESIF administrative costs and burden – Final report, Publications Office, 2018, <https://data.europa.eu/doi/10.2776/36663>

<sup>108</sup> European Commission: Directorate-General for Regional and Urban Policy, Spatial Foresight and t33, New assessment of ESIF administrative costs and burden – Final report, Publications Office, 2018, <https://data.europa.eu/doi/10.2776/36663>, see Annex III on the evolution of types of costs over time.

<sup>109</sup> Based on the raw data of the forthcoming study Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*

<sup>110</sup> Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027, forthcoming*. Estimates of the breakdown of costs by fund and task area were available only for the entire period (and not by end 2024)

<sup>111</sup> European Commission: Directorate-General for Regional and Urban Policy, Spatial Foresight and t33, New assessment of ESIF administrative costs and burden – Final report, Publications Office, 2018, <https://data.europa.eu/doi/10.2776/36663> Abstract, page 8.

electronic information exchange, running monitoring committees, communication and information activities, ensuring respect for fundamental rights and gender equality, and preparing management declarations. Other categories of tasks have median costs below 3,000 EUR per million spent. These include financial management (median cost of EUR 2,188 per million spent), audit (EUR 1,968), and monitoring, reporting, and evaluation (EUR 1,957).

Administrative costs are incurred not only by the programme authorities, but also by beneficiaries. As part of the study,<sup>112</sup> a survey was conducted with 197 CPR funds beneficiaries and 4 final recipients of financial instruments from 72 different programmes. However, due to survey limitations – such as significant differences in response rates across funds and Member States – for the sake of this evaluation the results will be presented only in qualitative terms. The administrative costs for beneficiaries are related to application process, project management, reporting and monitoring, and management and verifications. Among these categories, project management tends to be the most time- and labour- intensive task, also requiring the highest outsourcing costs. Overall, the ESF+ beneficiaries tend to have slightly higher administrative costs than beneficiaries of multi-fund or ERDF programmes but lower administrative costs than beneficiaries of other CPR funds.

**Estimations suggest that administrative costs have reduced compared to the previous period, but the results should be treated with caution.** The 2025 study<sup>113</sup> compared the new administrative costs for programme authorities with those presented in the 2018 study<sup>114</sup>. The budget weighted average costs per million spent in ESF+ programmes have decreased from EUR 27,600 to EUR 19,652 per million spent - a 29% reduction.<sup>115</sup> Similarly, the project application costs and project management costs for beneficiaries have decreased. However, these findings should be interpreted with caution since the two periods are not directly comparable (see [Annex II](#)).

**Simplification measures introduced in the 2021-2027 programming period likely have contributed to the reduction of administrative costs.** In the 2021-2027 period, 80 simplification measures<sup>116</sup> in Cohesion Policy were adopted to increase efficiency and reduce administrative burden. These measures include the simplification of the legal framework, a faster and more streamlined approach to programming, the reduction and simplification of various conditions, and simpler processes for implementation, management, control, and audit, along with more frequent but lighter reporting. Programme authorities were asked to assess the cost reduction potential of selected

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<sup>112</sup>Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*, forthcoming.

<sup>113</sup>Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*, forthcoming.

<sup>114</sup>European Commission: Directorate-General for Regional and Urban Policy, Spatial Foresight and t33, *New assessment of ESIF administrative costs and burden – Final report*, Publications Office, 2018, <https://data.europa.eu/doi/10.2776/36663>

<sup>115</sup>Estimates for the multi-fund programmes were not available

<sup>116</sup>European Commission: Directorate-General for Regional and Urban Policy, *Simplification Handbook: 80 simplification measures in cohesion policy 2021-2027*, 2018.

[https://ec.europa.eu/regional\\_policy/information-sources/publications/factsheets/2018/simplification-handbook-80-simplification-measures-in-cohesion-policy-2021-2027\\_en](https://ec.europa.eu/regional_policy/information-sources/publications/factsheets/2018/simplification-handbook-80-simplification-measures-in-cohesion-policy-2021-2027_en)

measures. The programme authorities of the ESF+ and multi-fund programmes<sup>117</sup> indicate that ‘a more proportionate approach to audits’ and ‘reduction of the number of verifications’ have a significant cost reduction potential. Other measures – ‘simpler rules on management costs and fees’, ‘streamlined payment applications’ – have moderate cost reduction potential. The ESF+ impact assessment also identified detailed and complex regulations and guidelines as factors affecting efficient delivery. As regards the Commission guidance documents, the number of these documents was significantly reduced in 2021-2027 programming period, but this did not always lead to increased efficiency. Some stakeholders noted that the lack of Commission guidelines was a hindering factor during programming, the assessment of enabling conditions, and the implementation of simplified cost options<sup>118119</sup>.

**The merger of the funds and fewer programming documents have likely produced efficiency gains.** In shared management the number of programmes has decreased from 188 in the 2014-2020 programming period to 169 in 2021-2027. Nineteen Member States integrated ex-FEAD types of operations in a broader programme. Moreover, by introducing streamlined programming and implementation rules, the ESF+ has reduced the administrative costs of beneficiaries who do not have to comply with different funding rules. According to 20 of the interviewed national level stakeholders and 15 of the open responses to the managing authorities survey, clear advantages of the merger of ESF and YEI included more streamlined and simplified management processes and more streamlined approach to implementation. Several interviewees (15) acknowledged the positive effects of the merger with FEAD, emphasizing reduced administrative burden, simplified management and easier processes for the reallocation of resources. However, a minority of interviewed stakeholders<sup>120</sup> expressed concerns about increased administrative burden for ex-FEAD type activities which are still managed by different ministries under ESF+, requiring increased coordination, or having lost some of the former flexibility by integration in the ESF+.

**Measures to streamline the programming process are assessed positively, but the programming process and programming documents are still regarded as complex.** The ESF+ impact assessment identified complex programming arrangements – excessively detailed Partnership Agreements and programmes – resulting in burdensome adoption and amendment processes and complex management of multi-fund programmes. Interviews and surveys provide mixed evidence regarding simplification in the programme preparation phase. Desk research and stakeholder interviews point towards a need to simplify the approach to the development of programming documents, notably Partnership Agreements. Stakeholders highlighted several hindering factors in the programming phase

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<sup>117</sup>Estimates are based on the raw data of the study: Ramboll, ‘*Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*’, forthcoming. For methodology, see [Annex II](#).

<sup>118</sup>Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025, p.157 and p.170.

<sup>119</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for Future platform, p.11, available at: [Adopted opinions - European Commission \(europa.eu\)](#).

<sup>120</sup>Government representatives in the ESF+ monitoring committee, ESF+ Intermediate Bodies, national ministries (AT, BE, BG, EL, LV, LU).

such as tight timelines and lengthy negotiations with the Commission<sup>121</sup>, complex and too detailed programming documents<sup>122</sup>, lack of guidance<sup>123</sup> and late adoption of the ESF+ Regulatory framework<sup>124,125</sup>. The Fit for Future Platform<sup>126</sup> expressed the view that there are too many fields required for programming documents. As regards the Partnership Agreements, the interviews and surveys<sup>127</sup> of the stakeholders suggest they are overall useful as strategic documents to support the identification of priority areas and target groups from the planning stage. However, the added value of Partnership Agreements is primarily perceived amongst stakeholders in larger and/or more decentralised Member States, where there is a stronger need for coordination at a central level to ensure coherence. For smaller countries, Partnership Agreements are often a high-level summary of programmes<sup>128</sup>. In the 2021-2027 programming period, there is no more an obligation to conduct the ex-ante evaluation, and the surveyed programme authorities (ESF+ and multi-fund programmes) assessed that this measure had a significant simplification potential<sup>129</sup>. The survey results also showed that the following measures have moderate cost reduction potential: ‘one strategic document per Member State to guide negotiations’, ‘shorter and better structured programmes’, ‘streamlined intervention logic’ and ‘simplified designation of authorities. No measure in programming stage was assessed as having minimal or negative cost reduction potential.

**Enabling conditions are generally perceived as relevant and conducive to effective and efficient investment<sup>130</sup>, but the monitoring of these conditions is still considered burdensome.** Monitoring the fulfilment of the enabling conditions entails administrative burden, which should be balanced against the expected positive impact of increasing the effectiveness of the investments. The ESF+ impact assessment had identified that the requirements linked to enabling conditions were complex, including numerous assessment criteria and duplication of their assessment in the Partnership Agreement and programmes. In the 2021-2027 programming period, a few changes regarding enabling conditions (previously called ex-ante conditionalities) were introduced. The number of enabling

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<sup>121</sup>15 interviewed stakeholders from national ministries, ESF+ monitoring committees members representing beneficiaries, employers, the government, representatives from ESF+ managing authorities and Intermediate Bodies from a third of Member States (i.e. AT, BG, CZ, EE, EL, ES, PL, PT, RO, SI, SE, SK).

<sup>122</sup>15 interviewed stakeholders from a range of Member States (e.g. BE, BG, CY, EE, EL, FI, HR, IE, LU, RO, SK) and stakeholder groups (national ministries, ESF+ monitoring committees; ESF+ Intermediate Bodies).

<sup>123</sup>15 interviewees from ESF+ managing authorities, government representatives in ESF+ monitoring committees, ESF+ Intermediary Bodies, and national ministries (e.g. DE, ES, HR, LV, PL, RO).

<sup>124</sup>Over 20 interviewed stakeholders across stakeholder groups (ESF+ monitoring committees; ESF+ managing authorities; government representatives in ESF+ monitoring committees; national ministries; ESF+ Coordinating Bodies; ESF+ beneficiaries; ESF+ Intermediary Bodies and the majority of Member States (e.g. AT, BG, DE, EL, ES, IE, LT, LV, MT, FR, PL, RO, SE, SI).

<sup>125</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for Future Platform, p.9 available at [Adopted opinions - European Commission \(europa.eu\)](https://ec.europa.eu/economic_finance_affairs/policy/economic/economic_opinions/economic_opinion_on_the_evaluation_of_european_social_fund_plus_fit_for_future_platform_en).

<sup>126</sup>Idem, p.9.

<sup>127</sup>Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025, pp.151-152.

<sup>128</sup>Idem, p.152.

<sup>129</sup>Estimates are based on the raw data of the study: Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*, forthcoming. For methodology, see [Annex II](#).

<sup>130</sup> See the sub-chapter on effectiveness.

conditions (both horizontal and thematic) was reduced from 36 to 20, and their assessment criteria were simplified. In addition, monitoring of the enabling conditions takes place continuously at the monitoring committees and annual review meetings where it is a compulsory point of discussion, and not just at the beginning of the period. However, according to the survey of ESF+ and multi-fund programme authorities<sup>131</sup> the reduction of the number of enabling conditions and clearer assessment criteria did not have a clear cost reduction potential. There are also some calls for improvement<sup>132</sup> such as clearer and more specific guidance from the Commission on how the fulfilment of these conditions should be demonstrated and monitored over specific time periods. A small minority of stakeholders expressed the view that the need of common enabling conditions across Member States can create unnecessary work if strategies already align with the enabling conditions. The 'Fit for Future' platform<sup>133</sup> expressed the view that the presence of some conditions at programme level is problematic because they are related to the Member State, not always to what the region can do, which risks slowing down development and implementation of programmes. Also, some regional hubs reported that the documents fulfilling the enabling conditions represent a significant administrative burden.

**Simplified cost options (SCOs)<sup>134</sup> and financing not linked to costs (FNLC)<sup>135</sup> are the main measures to reduce administrative burden.** SCOs provide a way of reimbursing expenditure not based on actual costs but according to predetermined amounts or percentages that are an estimation of the actual costs. FNLCs involve reimbursements linked to meeting specific conditions or achieving pre-defined results rather than actual costs. As identified by the ESF+ impact assessment, SCOs and FNLCs are expected to reduce administrative burden because programme authorities and beneficiaries do not need to collect, verify and store financial documents. In addition, these payment modalities simplify the audit trail. SCOs are also less error-prone than payments based on actual costs. According to the European Court of Auditors<sup>136</sup>, audits of the transactions involving SCOs found that between 2017 and 2022, only every 24th transaction involving SCOs was affected by error, compared to every fifth transaction based on reimbursement of actual costs. Additionally, the European Anti-Fraud<sup>137</sup> office has noted that the increased use of SCOs in 2014-2020 programming period may have been a significant factor contributing to the drop in non-fraudulent irregularities. In the previous periods, the uptake of SCOs and FNLCs ('joint action plans') remained low.

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<sup>131</sup>Estimates are based on the raw data of the study: Ramboll, 'Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027', forthcoming. For methodology, see [Annex II](#).

<sup>132</sup> Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025.

<sup>133</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for Future platform, p.20.

<sup>134</sup>[https://european-social-fund-plus.ec.europa.eu/en/simplified-cost-options#:~:text=Simplified%20Cost%20Options%20\(SCOs\)%20are,on%20process%2C%20outputs%20or%20results](https://european-social-fund-plus.ec.europa.eu/en/simplified-cost-options#:~:text=Simplified%20Cost%20Options%20(SCOs)%20are,on%20process%2C%20outputs%20or%20results)

<sup>135</sup><https://european-social-fund-plus.ec.europa.eu/en/financing-not-linked-costs>

<sup>136</sup>European Court of Auditors, Review 03/2024: An overview of the assurance framework and the key factors contributing to errors in 2014-2020 cohesion spending <https://www.eca.europa.eu/en/publications/RV-2024-03>, page 53.

<sup>137</sup>European Anti-Fraud Office, 33rd Annual Report on the Protection of the European Union's financial interests and the Fight against fraud, page 38 [https://anti-fraud.ec.europa.eu/system/files/2022-09/pif-report-2021\\_en\\_0.pdf](https://anti-fraud.ec.europa.eu/system/files/2022-09/pif-report-2021_en_0.pdf).

**The use of simplification measures, especially simplified cost options (SCOs), has increased significantly, contributing to a reduced administrative burden.** In the 2014–20 programming period 6.5% of the ESF budget<sup>138</sup> was covered by simplification measures at upper level (between programme authorities and the European Commission). This share has increased to 24.9% of the ESF+ budget in the current programming period. The corresponding increase for lower level (between programme authorities and beneficiaries) was from 31.5% to 49.8%. In absolute terms, the ESF increased its coverage from EUR 9.1 billion to EUR 22.8 billion at upper level and from 44.2 billion in 2014–2020 to EUR 70.7 billion in 2021–2027 at lower level. The largest share of increases of simplification measures come from SCOs. According to DG EMPL estimates, it is expected that the share of the ESF+ budget implemented using SCOs and FNLCs will increase to 50% by 2026.

As of January 2025, there are 235 SCO schemes. According to DG EMPL estimates, at the moment of drafting, around 90% of beneficiaries implement projects using SCOs and/or FNLCs. In the survey<sup>139</sup> of managing authorities about 90% of respondents indicated that they use SCOs, while 8% reported plans to adopt them. Consultations confirm the widespread use of SCOs, and in some countries (SE, BG, FI), they constitute the majority of financing modalities. According to the analysis of Partnership Agreements, the majority of Member States intend to increase the use of SCOs. According to the study on the uptake of simplification measures<sup>140</sup>, 44% of the ESF+ budget is covered by SCOs at lower level. By the end of the 2021–2027 period, ten Member States (CY, CZ, DK, ES, FI, LV, NL, PT, SE, SI) are expected to cover more than 50% of their ESF+ budget using lower level SCOs.

Applying the 2018 ex-ante simulations<sup>141</sup> and incorporating the current figures, an increase in the share of SCOs from 33% in the 2014–2020 period to 40% in 2024 resulted in an estimated cost reduction for programme authorities between EUR 96 million and EUR 141 million in 2024 prices.<sup>142</sup> If the target of achieving an SCO share of 50% by 2026 is met, the estimated cost reduction will be between EUR 232 and 342 million at 2024 prices.

Large majority of stakeholders acknowledge that SCOs reduce the administrative burden. Over 90% of managing authorities surveyed recognize the primary advantage of SCOs as reducing the administrative burden for beneficiaries. Facilitating the compilation of expenditures for beneficiaries is seen as an advantage by 87% of respondents, and

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<sup>138</sup> *Study on the uptake of SCO and FNLC for the CPR Funds in the 2014–2020 and 2021–2027 programming periods*, 2025. [Inforegio - Study on the uptake of SCO and FNLC for the CPR Funds in the 2014–2020 and 2021–2027 programming periods](#)

<sup>139</sup> Source for survey and interview results in this chapter, unless indicated otherwise: Ecorys, *Study supporting the mid-term evaluation of the ESF+ during the programming period 2021–2027*, 2025

<sup>140</sup> *Study on the uptake of Simplified Cost Options (SCO) and Financing Not Linked to Costs (FNLC) for the Common Provisions Regulation (CPR) Funds in the 2014–2020 and 2021–2027 programming periods*, 2025. [Inforegio - Study on the uptake of SCO and FNLC for the CPR Funds in the 2014–2020 and 2021–2027 programming periods](#)

<sup>141</sup> *New assessment of ESIF administrative costs and burden*, 2025. <https://op.europa.eu/en/publication-detail/-/publication/4f4b7bcc-e18f-11e8-b690-01aa75ed71a1/language-en>

<sup>142</sup> With a view to gaining better estimates also for the ex-post evaluation, the study may have to be updated at a later stage.

simplification of the management process is recognized as an advantage by 85%. Facilitation of payments to beneficiaries is acknowledged by 81% of respondents and the reduction of administrative burden for managing authorities is noted by 80%. Interviewed stakeholders also highlighted the transparency and low error rates associated with SCOs, as well as simplified paperwork and fewer checks during the reimbursement stage. Three Romanian evaluations<sup>143144145</sup> have identified the potential of SCOs to reduce administrative costs. So far only one evaluation has assessed the concrete results of applying SCOs in practice. This evaluation concluded that various streamlining efforts introduced in Lower Saxony, Germany,<sup>146</sup> during the 2021-2027 programming period have made the accounting and reporting process easier and more transparent than in the 2014-2020 programming period. The study<sup>147</sup> on administrative burden also confirms that the increased use of all types<sup>148</sup> of SCOs has significant cost reduction potential. The share of respondents who believe that SCOs have the potential to reduce administrative costs is significantly higher than the share of those who believe they might increase costs. Similar conclusions are reached by the study<sup>149</sup> on the uptake of simplification measures. Majority of surveyed programme authorities indicate that SCOs are relevant in terms of reducing administrative burden (90% agreeing), simplifying compliance (88%), reducing error rate (88%) and easier application for beneficiaries (83%). The survey results also showed that the benefits of SCOs go beyond less administrative burden and include more focus on results (77%) and focus on other activities (72%), and these shares have increased as compared to the survey results of the previous programming period. Not only the programme authorities but also beneficiaries report on benefits of using the SCOs. Large majority (89%) of beneficiaries who were aware of SCOs reported that SCOs brought benefits to project management such as reduction of administrative burden (56%) and greater focus on quality or results (37%).

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<sup>143</sup>Andreea Savin et.al., *Raport de evaluare ad-hoc 2, împreună cu seturile de date și metadate/ Evaluare ad-hoc pentru sprijinirea stabilirii opțiunilor de costuri simplificate pentru Programul Operațional Sănătate 2021-2027*, 2023. [ROE84.pdf](#)

<sup>144</sup>Liliana Lucaciu et.al., *Raport de Evaluare Ad-hoc 2, împreună cu seturile de date și metadate, pentru sprijinirea stabilirii opțiunilor de costuri simplificate pentru Programul Operațional Incluziune și Demnitate Socială*. 2022. [ROE85.pdf](#)

<sup>145</sup>Andreea Savin et. al, *Raport de evaluare ad-hoc 3, împreună cu seturile de date și metadate/ Evaluare ad-hoc pentru sprijinirea stabilirii opțiunilor de costuri simplificate pentru Programul Operațional Educație și Ocupare 2021-2027-faza 2*, 2022. [ROE83.pdf](#)

<sup>146</sup>Wolfgang Jaedicke, *Umsetzung des Querschnittsziels „Gute Arbeit“ im niedersächsischen Multifonds-programm*, 2024. [DEE374.pdf](#)

<sup>147</sup>Estimates are based on the raw data of the study: Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*, forthcoming. For methodology, see [Annex II](#) and [Annex IV](#) for details.

<sup>148</sup>This refers to the following SCO modalities: SCOs as an integral part of programme (SCOs can set in accordance with CPR Art 94.2); SCOs set by Delegated Acts prepared by the Commission (CPR Article 94.4); use of SCOs for reimbursement to beneficiaries and obligatory use of SCOs for smaller operations (CPR Art 53) and technical assistance reimbursed in proportion to progress in implementation, using a flat-rate (CPR Art.36-37).

<sup>149</sup> *Study on the uptake of SCO and FNLC for the CPR Funds in the 2014-2020 and 2021-2027 programming periods*, 2025. [InfoREGIO - Study on the uptake of SCO and FNLC for the CPR Funds in the 2014-2020 and 2021-2027 programming periods](#)

**FNLCs are used less and there is mixed evidence regarding perceived benefits of their use.** According to the study<sup>150</sup> on the uptake of simplification schemes, as of spring 2024, only 6% of the ESF+ budget (EUR 8.5 billion) is covered by the FNLCs. The same study also assesses that by the end of the current programming period, at least fourteen Member States are expected to use FNLC. Among them, eight Member States (CY, EE, FR, HU, LV, PL, PT, RO) already have approved schemes. The survey conducted in the framework of the supporting study<sup>151</sup> indicates that only 9% of managing authorities surveyed indicate current use of FNLCs, and over half (53%) state that they neither use nor plan to use them in the future. 21% of respondents reported plans to use FNLCs in the future. The interview evidence also indicates that FNLCs are used only sporadically. As regards the advantages of using FNLCs, only 38% of the managing authorities surveyed indicated reduction of administrative burden for beneficiaries. Simplification of the management process as an advantage is mentioned by 33%, facilitating compilation for expenditure for beneficiaries by 30%, and reduction of administrative burden is mentioned by 29% of managing authorities surveyed. The survey evidence from the study on administrative costs<sup>152</sup> also does not identify significant expected cost savings from the increased use of FNLCs. A study on the uptake of simplification measures has a significantly more positive assessment of the benefits of the FNLC. The programme authorities surveyed agree that FNLCs reduce administrative burden (93%), simplify compliance (93%), lower error rates (85%), simplify application for beneficiaries (85%) and increase focus on results (84%) and other activities (84%).

**Challenges persist in implementing simplification modalities, particularly FNLCs.** ESF+ stakeholders interviewed mention high initial investment required to set up an SCOs and FNLCs schemes as the main disadvantage. The main concerns leading managing authorities to avoid implementing FNLCs include their potential financial impact on beneficiaries if programmes do not perform as expected, anticipated issues with verifying results, concerns about future audits, and difficulties in demonstrating that intended goals have been achieved. Other challenges mentioned regarding FNLCs include the risk of "cherry-picking" (selecting target groups that are perceived to successfully achieve outcomes within the budget) and the perceived limited flexibility of FNLCs. An additional obstacle for both SCOs and FNLCs is national rules that counteract the benefits of simplification, such as the requirement to maintain records of all expenditures. Similar concerns were reflected by the study<sup>153</sup> on the uptake of simplification measures. The surveyed programme authorities mention the lack of information/experience on how to design and implement FNLCs schemes (75% rating this as medium/high importance) as the main reason to not use FNLCs. Other reasons mentioned are legal uncertainty (71%),

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<sup>150</sup> Study on the uptake of SCO and FNLC for the CPR Funds in the 2014-2020 and 2021-2027 programming periods, 2025. [InfoREGIO - Study on the uptake of SCO and FNLC for the CPR Funds in the 2014-2020 and 2021-2027 programming periods](#)

<sup>151</sup> Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025.

<sup>152</sup> Estimates are based on the raw data of the study: Ramboll, *Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027*, forthcoming. For methodology, see [Annex II](#).

<sup>153</sup> Study on the uptake of SCO and FNLC for the CPR Funds in the 2014-2020 and 2021-2027 programming periods, 2025. [InfoREGIO - Study on the uptake of SCO and FNLC for the CPR Funds in the 2014-2020 and 2021-2027 programming periods](#)

burdensome (70%), riskiness (65%), risk of systemic impact (64%) and lack of obvious benefits (52%). The programme authorities also reported on main challenges when designing the FNLC schemes. Over 80% of respondents indicated that FNLC schemes are complicated and challenging to put in practice. The respondents reported also a lack of guidance (84%), lack of knowledge (77%) and resources (77%) and difficulties to identify suitable operations (75%). Lower share of programme authorities identified challenges related to SCOs. The main challenge indicated was lack of alternative data sources to address the limitation of historical data when designing the SCOs schemes (48% agreeing).

There are a number of materials on SCOs and FNLCs available such as guidance note on SCOs<sup>154</sup>, two delegated regulations<sup>155,156</sup> on SCOs and FNLCs and other materials<sup>157</sup> available to support the take-up of the SCOs and FNLCs. For FNLCs adopted under Art. 95 CPR, as detailed in Appendix 2<sup>158</sup> of Annex V CPR, legal certainty is provided with a clear, adequate and complete audit trail being approved ex ante by the Commission. However, stakeholders still noted the limited guidance<sup>159,160</sup> and a general lack of knowledge and competence among applicants regarding SCOs. The Fit for Future platform also highlighted several challenges linked to SCOs and FNLCs, such as their complex and time-consuming development and use. Specifically, according to the platform, the mandatory requirement to develop SCOs for projects below EUR 200 000 often requires a higher administrative burden than real cost reporting.<sup>161</sup>

**The simplification of the monitoring system has contributed to reducing administrative burden.** The ESF+ impact assessment identified burdensome monitoring processes due to complex data-collection requirements and the limited use of administrative registers for collecting participants' data as key issues. As confirmed by the analysis of legal texts, there was an overall reduction in the number of indicators used compared to the previous programming period. Common output indicators were streamlined to focus on the most relevant target groups of the ESF+. Indicators with limited relevance or complex definitions, such as 'other disadvantaged,' were removed. Data on people belonging to disadvantaged groups may now be collected using informed estimates<sup>162</sup>, providing less intrusive and simplified methods of data collection. The integration of the YEI into ESF+ is also associated with a significant reduction in the number of indicators required to monitor youth support measures. Overall, output and result indicators' number per EUR 100 million (intensity) decreased from the previous to the current period from 4.4 to 2.7 and from 3.7 to 2.0 respectively. Moreover, in the 2021-2027 period, the performance reserve was abolished, which is expected to further reduce the number of programme-specific indicators and simplify data collection and reporting. While stakeholder perspectives on the relevance of indicators varied, consultation

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<sup>154</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1736171609509&uri=CELEX:52024XC07467>

<sup>155</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32023R1676>

<sup>156</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32022R2175>

<sup>157</sup> <https://european-social-fund-plus.ec.europa.eu/en/simplified-cost-options>

<sup>158</sup> [Appendix 2 of Annex V of the CPR \(EU\) 2021/1060 of 24/06/2021](#)

<sup>159</sup> Opinion on the Evaluation of European Social Fund Plus, Fit for Future platform, p.11.

<sup>160</sup> Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025, p.205.

<sup>161</sup> Opinion on the Evaluation of European Social Fund Plus, Fit for Future platform, p.24.

<sup>162</sup> See [NOTE ON INFORMED ESTIMATES MARCH 2024 | SFC Support Portal](#)

evidence<sup>163,164</sup> points to support for streamlining and simplification efforts, with a general consensus that the indicator system has been simplified. However, a small number of stakeholders<sup>165</sup> felt that data collection requirements remain too burdensome, noting that a census approach is expensive, difficult, and cumbersome for both participants and managing authorities. A minority of stakeholders, particularly ESF+ beneficiary organizations, also mentioned challenges with target setting.

**The use of administrative registers for collecting participants' data continues to be a challenge.** According to a study “Smart ways to monitor and evaluate the ESF”<sup>166</sup>, administrative data was used in all nine Member States<sup>167</sup> covered by the study, but with very limited use in Germany and France. According to the survey<sup>168</sup> on monitoring and information systems in the Member States, only 65% of programmes surveyed use administrative registers for monitoring purposes. Most of these Member States use only one or two registers (usually unemployment or social security), and a direct survey of participants is still used to collect the majority of information on indicators. According to the survey, half of the respondents (48%) reported encountering some or significant difficulties to conclude data sharing agreements with the institutions managing administrative data due to complex processes. These were followed by interoperability challenges between data sources as well as legal barriers related to personal data protection (in both cases 47% of respondents reported facing some/significant difficulties). In addition, Commission’s internal analysis suggests that uncertainties related to legal basis are one of the main challenges in accessing the administrative registers. Data collections from participants imposes administrative burden on authorities, beneficiaries and participants. Improving access to administrative data would contribute not only to improving the evidence base through higher quality data, but also to reducing administrative burden of the monitoring and evaluation of the future cohesion policy.

**Mixed evidence regarding the administrative burden due to lighter reporting requirements. Use of digital tools remains challenging at times.** In the 2021-2027 programming period, the annual implementation and progress reports were replaced with annual, more qualitative policy dialogues and lighter but more frequent electronic data transmission. This shift aimed to reduce the administrative burden. However, the programme authorities surveyed (ESF+ and multi-fund programmes)<sup>169</sup>, do not indicate that ‘real time reporting instead of annual reports’ has a potential to reduce administrative burden. On the other hand, according to the ‘Fit for Future’ platform, the majority of stakeholders consulted believe the simplification measures introduced (including, regular

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<sup>163</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for Future platform, p.16.

<sup>164</sup>Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025. p.280.

<sup>165</sup>Idem, p.283.

<sup>166</sup>European Commission: Directorate-General for Employment, Social Affairs and Inclusion, Hassan, E., Lundberg, P., Omersa, E., Robson, C. et al., *Smart ways to monitor and evaluate the ESF – How to gain access to administrative data while complying with data protection rules – Final report*, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2767/580113>.

<sup>167</sup>AT, ES, DE, FR, IE, IT, PL, RO, SE.

<sup>168</sup> The survey has been carried out by the ESF+ Data Support Centre. Responses have been gathered about 54 systems which cover 145 programmes.

<sup>169</sup>Estimates are based on the raw data of the study: Ramboll, *‘Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027’*, forthcoming. For methodology, see [Annex II](#).

data transmission instead of annual implementation and progress reports) have generally had a positive impact. Stakeholder feedback also shows that e-cohesion tools are widely used and are largely considered to have made processes easier. However, stakeholders also noted that while the more frequent transmission of electronic data provides up-to-date information, it also introduces some administrative burden, as the data often needs to be consolidated and imported manually, which involves significant effort and poses a risk of errors. Other challenges include lengthy data entry, compatibility with national regulations, interoperability with national systems, and the significant effort required to develop and adapt information systems.

### *EaSI strand*

In terms of simplification, the EaSI strand funding opportunities and results are promoted since 2021 via the Funding and Tenders Portal, which is now the single entry point (the Single Electronic Data Interchange Area) for stakeholders, including applicants and beneficiaries<sup>170</sup>. Additionally, the National Contact Points (NCPs) promote the EaSI strand opportunities and results in the participating countries' languages which facilitate the understanding of documents and reduces the number of requests for translations. However, evidence indicates some confusion at stakeholders' level between the roles of the NCPs and of the National Competence Centres for Social Innovation (NCCs)<sup>171</sup>. Further confusion is created by the fact that while the Funding and Tenders Portal publishes information on direct management calls, the ESF+ website provides an overview of the instrument, and the website run by the European Social Fund Agency (ESFA) provides information on the Social Innovation Plus Initiative<sup>172</sup>, including the EaSI strand calls under indirect management focusing on the transfer of social innovation.

Evidence also indicates that EaSI strand follows separate administrative processes in terms of application, selection and reporting under direct and indirect management (Social Innovation Plus Initiative), which can be potentially confusing at applicants' level. While under direct management, applicants use European Commission's corporate new system (eGrants), under indirect management, applicants submit their application through ESFA's online portal (eSINNIS, i.e. Social Innovation Information System).

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<sup>170</sup>The projects are promoted at the [Projects & Results](#) section, while the eGrants system – accessible via the same Portal – became the single gateway for all exchanges (submission, evaluation, implementation and reporting) between applicants and the Commission. Additional information and statistics on proposals, success rates, funded projects and participants is available on the Portal as well. Furthermore, the Portal also hosts a 'What's New' section with news about the EaSI strand. Here, the Commission informs about EaSI strand events, including those organised in Member States and participating countries and publishes articles informing about the strand.

<sup>171</sup>At national level, the National Contact Points (NCPs) – managed under the direct management mode of the EaSI strand - provide information in their country about all strand's activities (e.g. funding opportunities, application requirements, projects funded and results). The six National Competence Centres for Social Innovation (NCCs) - covering 25 countries and mobilising 148 organisations - aim to cultivate networks, build capacities and synergies, spotlight efficiencies and develop the tools and methods essential to growing social innovation across the EU. The NCCs are managed under the indirect management mode of the EaSI strand (Social Innovation Plus Initiative). For more information: <https://european-social-fund-plus.ec.europa.eu/en/competence-centres-social-innovation>).

<sup>172</sup><https://socialinnovationplus.eu/>.

Within indirect management, the representatives of beneficiaries under the ALMA call for proposals reported that the application process (on the eSINNIS platform<sup>173</sup>) was straightforward. Despite minor technical challenges, most representatives consulted were satisfied with the application process and benefited from the responsiveness of ESFA as well as info sessions and in-person meetings. However, three focus group participants found the application form repetitive, requiring the same information multiple times, but in a slightly different format.

In terms of programmes' performance measurement, the *ex-post* evaluation of the EaSI programme (2014-2020) indicated the need to focus on quantitative indicators in order to compare their baseline values with their end-values. Based on the experience with the EaSI programme performance measurement system – with a total of 42 headline and complementary indicators – a simplified system with a limited number of quantitative indicators (six primary indicators) was established to measure the EaSI strand performance in 2021-2027. A structured stakeholders' consultation<sup>174</sup> is also organised before the adoption of the EaSI strand Annual Work Programmes, which allows to use more efficiently their inputs in the programming process.

Financial reporting requirements have also reduced with the simplified cost options. However, it has to be noted that there is still limited experience with units' costs reporting under the EaSI strand which were only used for the action grants supporting the NCPs establishment and the operating grants for the EU-level NGO networks (for the latter only for travel/accommodation expenses). The introduction of the eGrants system was broadly regarded by stakeholders as a positive step in terms of reducing administrative burden, with about half of respondents to the EaSI survey agreeing that it successfully streamlined the grant management process (50%, 16 out of 32)<sup>175</sup>. Additionally, interview data revealed that indeed, through eGrants, compared to the previous programming period, the timeframe for contract signing was reduced from several weeks to just 24 - 48 hours, helping projects to start faster. Despite the benefits, stakeholders across all consultation activities highlighted the significant time required to become familiar with the eGrants system and pointed out several areas for improvement, particularly the need to enhance its user-friendliness. Interview data also emphasized the necessity to reduce duplications in the application, monitoring, and reporting processes for projects. This includes financial reporting, where reporting unit costs was reported to impose a significant burden on project promoters.

According to some stakeholders, improving these aspects could help attract smaller applicants to EaSI. Indeed, whereas evidence indicates that the administrative burden in the application phase and the reporting requirements were considerably reduced with the use of the eGrants, the related processes remain – as already identified by the EaSI programme *ex post* evaluation – too burdensome, notably for small organisations and for the operating grants beneficiaries (EU-level NGO networks). For instance, the support

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<sup>173</sup><https://socialinnovationplus.eu/app/uploads/2024/08/eSinnis-Application-Form-Guide.pdf>.

<sup>174</sup>This yearly strategic dialogue exercise has two parts: on one hand the EU level civil society organisations are consulted through an online dialogue meeting; and on the other hand, the EU level social partners are consulted in an email exchange.

<sup>175</sup>Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025, “Synopsis report” (Annex 2 to the ‘Study supporting the ESF+ mid-term evaluation’).

offered to these networks under the Framework Partnership Agreements for operating grants<sup>176</sup>, allows them to secure their long-term sustainability and to become critical sources of expertise both for national policymakers and EU institutions. However, the networks should reapply each year to recurrent calls for proposals which translated in a state of uncertainty and generated administrative burden both on applicants' side and the Commission services' side.

### Coherence

**Analysis of the legal texts shows that ESF+ is coherent and complementary in its objectives with other instruments in the area of human capital, as well as those supporting the digital and green transition.** These instruments include the RRF, ERDF, JTF, EGF, InvestEU, Erasmus+, Horizon Europe, Digital Europe, EU4Health, AMIF, Digital Europe, the Cohesion Fund, EMFAF, EAFRD and CAP. The ESF+ Regulation, as well as the regulations of other EU funding instruments, provide a strong legal basis to promote coherence and avoid overlaps. Articles 7(1) and 31(3) include provisions to foster synergies between ESF+ and other relevant EU funding instruments. The ESF+ regulation refers in its recitals<sup>177</sup> to the coherence of the ESF+ with EU instruments such as Erasmus+<sup>178</sup>, Horizon Europe, AMIF, EU4Health, InvestEU, ERDF, Cohesion Fund and EMFAF. Similarly, regulations governing the other funds such as ERDF, Cohesion Fund, AMIF, Horizon Europe<sup>179</sup> have reciprocal provisions about ensuring coherence with ESF+. Additionally, the Common Provisions regulation (EU) 2021/1060 sets out common provisions and financial rules which can facilitate coherence among ERDF, ESF+, Cohesion Fund, JTF and EMFAF. It also provides for common financial rules with AMIF, ISF (Internal Security Fund) and BMVI (Border Management and Visa Policy Instrument).

**National-level programming documents include specific provisions and administrative mechanisms to foster complementarity with other funds.** In line with the mandatory template, complementarities and synergies are defined in the Partnership Agreements and then further detailed in the programmes in shared management. The need for strong coordination with the National Recovery and Resilience Plans (NRRPs) is recognised in almost all cases. To facilitate coordination, the Member States have put in place different coordination mechanisms. These can take the form of umbrella committees, working groups (e.g. BE Flanders, DE), coordination platforms (e.g. SK), dedicated reporting mechanisms aiming at informing all actors involved on the potential complementarities and demarcations needed (EL), or even concentration of all programmes under the responsibility of the same entity (BE German-speaking region).

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<sup>176</sup>The Framework Partnership Agreements under the EaSI strand are long-term cooperation instruments that serve as umbrella for recurrent grants to EU-level NGO networks active in the employment and social inclusion fields. The specific operating grant agreements are then awarded on an annual basis following an invitation to submit a proposal addressed to the framework partners. This type of procedure for selecting operating grants is defined in the Financial Regulation, and therefore cannot be modified.

<sup>177</sup>Recitals 15, 16, 20, 21 and 22.

<sup>178</sup>There is however only limited mention of coherence with the ESF+ in the Erasmus+ Regulation, specifically in relation to the 'Seal of Excellence'.

<sup>179</sup>ERDF and Cohesion Fund regulation (recitals 8, 36, 39, 46175), AMIF (recital 15 and Article 2177) and Horizon Europe regulation (Annex IV).

**While the instruments' legal bases and programming documents include provisions to foster complementarity between ESF+ and other funds, there are some challenges in ensuring synergies in implementation.** According to the stakeholders' views<sup>180</sup>, obstacles to implementing synergies include differences in timings of application procedures, nature and rules of calls for proposals, geographical focus (transnational vs. national/regional), governance level (EU vs. national/regional) and lack of awareness/support from ESF+ managing authorities about seeking synergies with other funds.

**The degree of complementarity varies across funds, with the strongest complementarities seen between the ESF+ and ERDF.** ESF+ and ERDF funds have a long tradition of complementarity over many decades. They have the same rules of management, programming and auditing which foster synergies. ESF+ and ERDF programme planning is usually coordinated, especially in the multi-fund programmes. The monitoring committees oversee the coordination and complementarities of CPR funds. The complementarities between ESF+ and ERDF investments are particularly emphasised in national and regional programming documents, with ERDF supporting investments in 'hard' infrastructure, while ESF+ supports the 'soft' accompanying measures such as education, training, social inclusion and employment integration. The results of the survey of ESF+ managing authorities suggest that the ESF+ demonstrates the highest degree of complementarity with the ERDF compared to any other fund in the survey with 74% (67 out of 91) indicating this. The same survey also shows that, compared to the previous period, the complementarity increased most for the ERDF<sup>181</sup> as compared to other funds. Consultations with stakeholders confirm that overall, there is a good coherence between the ESF+ and the ERDF and there are many examples of complementary investments. For example, in Bulgaria in case of Roma, ERDF supports construction of social houses and ESF+ provides assistance to find job and skills improvement. However, the consultations also highlight some challenges in ensuring synergies. These include mainly insufficient coordination in timing and between departments managing both funds, and the need for beneficiaries to submit separate applications.

**There is a high degree of complementarity between the objectives of the ESF+ and both RRF and JTF, but some overlapping priorities could lead to substitution effects and create challenges in implementation.** According to the survey of the managing authorities, 65% (59 out of 91) of the respondents believe that the ESF+ is complementary with the RRF to a large or moderate extent (the second highest of all instruments covered in the survey). The corresponding figure for the JTF was also relatively high, at 47.25% (43 out of 91). High level of complementarity was also noted in the national level interviews. The most common areas of complementarity with the RRF given in the survey include active labour market policy measures, skills development, social cohesion and lifelong learning. ESF+ and JTF show the highest degree of complementarity in upskilling and reskilling. As an example of complementarity between the ESF+ and the RRF, in Poland funding from both the RRF and ESF+ are intended to support the creation and

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<sup>180</sup>Ecorys, *Study supporting ESF+ mid term evaluation*, 2025, p.107.

<sup>181</sup> Majority for all funds responded that the complementarities was about the same as in previous period (52%) or they replied 'do not know' (36%). The share of those who believe that complementarities have increased are 25% for ERDF, 24% for AMIF, 19% for JTF, 10% for Cohesion Fund and 5% for Horizon Europe.

running of childcare facilities. The RRF will support the construction of new facilities, while ESF+ will cover the running cost of some of those entities for first two years. However, the survey of the managing authorities also confirmed the potential of the RRF to substitute ESF+ with 36% (33 out of 91) of the respondents considering that the RRF displaced operations that would typically be financed under ESF. Potential substitution and overlaps were also highlighted in stakeholder interviews<sup>182</sup>. Interviewees also mentioned the efforts needed to ensure clear differentiation between the funds and appropriate sequencing and challenges of working under different rules.

It is to be noted that, while ESF+ investments require compliance with enabling conditions, there is no such conditionality for the RRF which can create incoherence between the two funding instruments.

As identified by the RRF mid-term evaluation<sup>183</sup>, not all Member States adopted *ex ante* strategies to create synergies between the two funds. The RRF was prioritized, and in some cases more mature projects, originally expected to be implemented under the 2021-2027 Cohesion Policy programmes, were implemented under RRF. The Fit for Future platform<sup>184</sup> also highlights the challenge of managing a large number of funding instruments, which invest in similar or even identical areas but operate under different rules and, in some countries, at different levels of government. The platform argues that the introduction of the RRF midway through the programming period contributed to delays in both the implementation of the 2014-2020 programmes and the negotiation of the 2021-2027 Cohesion Policy programmes. While stakeholders have indicated a risk of substitution between ESF+ and RRF/JTF, there is no evidence that it has created significant negative effects, apart from some implementation challenges. Additional investments from the RRF/JTF in addressing labour market and social challenges have freed ESF+ resources to tackle other issues or increase the intensity of support. Additionally, some operations initially funded by the RRF may transition to ESF+ once RRF allocations are exhausted. For example, in the Attica region in Greece, an RRF-funded innovative action for persons with disabilities is expected to be scaled up under the ESF+<sup>185</sup>. To date, no evidence of risks of double funding in implementation has been found<sup>186</sup>.

**Overall good complementarity is demonstrated between the ESF+ and AMIF with clear demarcation and good examples of complementarities, but there is scope to improve coordination between the funds.** Both funds support the integration of migrants with ESF+ supporting the longer-term integration of migrants and AMIF covering short-

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<sup>182</sup>Ecorys, *Study supporting ESF+ mid-term evaluation*, 2025, pp.124-125.

<sup>183</sup> Mid-Term Evaluation of the Recovery and Resilience Facility: Strengthening the EU through ambitious reforms and investments COM(2024) 82 final, p.178. [Mid-term evaluation of the Recovery and Resilience Facility \(RRF\) - European Commission \(europa.eu\)](#).

<sup>184</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for future platform, pp.6-7. [Adopted opinions - European Commission](#)

<sup>185</sup>Ecorys, *Study supporting ESF+ mid-term evaluation*, Ecorys, 2025, p.120

<sup>186</sup> In its replies to the ECA's [Special report 22/2024](#): Double funding from the EU budget, the Commission noted that "the ECA did not detect any case of double funding in the context of this performance audit. Moreover, in its annual report for the financial year 2023, the ECA has not identified any case of double funding under the RRF, while in its 2022 annual report, the ECA identified only one case of double funding – a finding the Commission does not agree with as the measure at stake is fully funded without any RRF contribution (a so-called "zero cost measure")."

term needs. The survey of managing authorities shows that almost 50% (44 of 91 responses) considered that the AMIF was complementary to ESF+ to a large or moderate extent (the third highest of all instruments covered in the survey). Complementarity and coherence between these funds were confirmed also by the national stakeholder interviews (BE, EE, FI, LT, MT, NL PL, SK). The EU level networks of organisations<sup>187</sup> supporting the rights of the refugees, asylum seekers and migrants, welcomed the transfer of long-term integration of third-country nationals from the AMIF to the ESF+, but they also noted an observed a lack of cooperation between authorities at national level and called for further support from the European Commission to ensure no migrant falls into a gap of support between the two funds.

**There is relatively good complementarity between the ESF+ and the EAFRD.** Both funds support social inclusion and poverty reduction with the EAFRD focusing on rural areas. The survey of the managing authorities shows that 41% of respondents (37 out of 91 replies) considered both funds to be complementary to a large or moderate extent. One example is the VirtuALL operation that engages older persons in rural Portugal with digital technologies and social activities. Initially supported by ESF+, this project was expanded with co-funding from EAFRD. However, the ‘Fit for Future’<sup>188</sup> platform points out the complexity and fragmentation of different funding instruments and rates mainly negatively that the EAFRD is implemented out of the CPR framework.

**ESF+ has coherent objectives but limited complementarities in practice with the Cohesion Fund, EMFAF, EGF, the CAP 2023-2027 and EU4Health.** The survey of the managing authorities (91 replies) indicates a relatively low degree of complementarity between ESF+ shared-management and Cohesion Fund (only 29% considering that there is a complementarity to a large and moderate extent), EMFAF (16%), EGF (16%), InvestEU (13%), CAP 2023-2027 (14%), EU4Health (14%). The largest share of respondents indicates that either there is no complementarity between these funds, or chose the answer ‘do not know/not applicable’.

The low degree of complementarity between ESF+ and the Cohesion Fund, EMFAF and CAP 2023-2027 can be explained with the different objectives of these funding instruments. The Cohesion Fund supports CPR policy objectives 2 (greener Europe) and 3 (more connected Europe), while ESF+ supports the policy objective 4 (more social Europe). EMFAF’s objective is to support sustainable fisheries, aquaculture, blue economy and international ocean governance which has little common with the objectives of the ESF+ and thus little potential for complementarities. Similarly, the ten policy objectives of CAP 2023-2027 have minimal overlap with the objectives of the ESF+.

Both ESF+ and EGF support workers that were displaced during restructuring with ESF+ acting as a preventive fund and EGF as a reactive emergency fund. There are limited synergies between the ESF+ and EGF despite common objectives, and this can be explained by a relatively small scope of the EGF as compared to the ESF+. The EGF has an annual budget of 35 million EUR, and during the period of 2021-2022 supported only

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<sup>187</sup>European Council on Refugees and Exiles and Platform for International Cooperation on Undocumented Migrants.

<sup>188</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for Future platform, p.6.

nine Member States in 14 instances<sup>189</sup>. ESF+ shares with the EU4Health<sup>190</sup> focus on health under the following specific objectives: (d) healthy working environments; and (k) access and accessibility to healthcare systems and long-term care services. EU4Health objectives are also coherent with the EaSI strand operational objective (f) which includes a focus on networking between health insurance institutions.

**The interim evaluation<sup>191</sup> of InvestEU concluded that the policy alignment between InvestEU and ESF+ is very high and that both funding instruments are complementary.** While ESF+ shared-management strand and InvestEU have similar ultimate goals, they are delivered very independently with involvement from different types of entities, whereas a blended finance approach would be beneficial to support relevant activities. The ESF+ managing authorities had the option to transfer part of their programme to InvestEU (which was a major simplification, compared to the previous programming period), which would enable them to use ready-made products under InvestEU. However, in practice, there has been no take-up so far. The interim evaluation of InvestEU shows that activities implemented by InvestEU partners and ESF+ managing authorities at national level are parallel but not joined-up. This finding was corroborated by one national-level ESF+ intermediate body (PT) who thinks that the InvestEU programme could be better aligned with ESF+, including its EaSI strand.

**As regards the EaSI strand, several activities to support the InvestEU action were funded under its operational objectives related to microfinance and social enterprises<sup>192</sup>, indicating good complementarity between the two instruments.** In the microfinance field, EaSI strand funded ‘Advisory services and technical assistance for microfinance providers’<sup>193</sup> (2021). EaSI strand also supported four initiatives in 2021-2024 in the field of social entrepreneurship: ‘Advisory services and technical assistance for social enterprise finance providers’ (2021)<sup>194</sup>; ‘Transaction costs to support social finance intermediaries’ (2022)<sup>195</sup>; ‘Flash Eurobarometer on attitudes of young people towards

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<sup>189</sup>[https://employment-social-affairs.ec.europa.eu/policies-and-activities/funding/european-globalisation-adjustment-fund-displaced-workers-egf\\_en](https://employment-social-affairs.ec.europa.eu/policies-and-activities/funding/european-globalisation-adjustment-fund-displaced-workers-egf_en).

<sup>190</sup>See [https://health.ec.europa.eu/funding/eu4health-programme-2021-2027-vision-healthier-european-union\\_en](https://health.ec.europa.eu/funding/eu4health-programme-2021-2027-vision-healthier-european-union_en).

<sup>191</sup> InvestEU interim evaluation (SWD(2024) 229 final), p.41. [InvestEU, interim evaluation](#).

<sup>192</sup>The financial instruments for microfinance and social enterprises implemented under the former EaSI programme were deployed under the [InvestEU Fund](#). The current ESF+/EaSI strand kept only non-financial instruments (calls for proposals) to support the development of microfinance and social entrepreneurship markets in the EU. The following operational objectives of the EaSI strand are aligned with the InvestEU objectives: (e) provision of microfinance to microenterprises and (f), which includes a focus on microfinance institutions and institutions providing finance to social enterprises and the social economy.

<sup>193</sup>The aim of these capacity building activities was to help microcredit providers in the EU to improve the quality of their operations, to scale up, and to become self-sustainable. The goal was to boost the capacity of microcredit providers and to facilitate their access to the existing EaSI financial instruments and to the financial instruments under InvestEU.

<sup>194</sup>These services are aimed at helping social enterprise finance providers in the EU to improve the quality of their operations, to scale up, and to become self-sustainable. The aim is to boost the capacity of social enterprise finance providers and facilitate their access to the financial instruments under InvestEU.

<sup>195</sup>This call for proposals focuses on supporting financial intermediaries that undertake long term risk capital investments in ticket sizes of less than EUR 500 000 in social enterprises. The idea is lowering transaction costs (i.e., travel cost, lawyers' fees, costs for carrying out the due diligence and business development

social entrepreneurship’ (2022); ‘Actions to boost the development of finance markets for social enterprises’ (2024).<sup>196</sup>

**There is good coherence in terms of objectives with Erasmus+ and Horizon Europe, but the complementarities in the implementation of actions at the national level are relatively limited for the ESF+ shared management strand, while there are good complementarities and no evidence of overlaps for the ESF+ EaSI strand.** ESF+ and Erasmus+ are active in similar fields, notably as regards the support to skills, upskilling and digital competences. Horizon Europe supports research and innovation and thus is complementary with the ESF+ as a whole, which is the main EU instrument for investing in human capital and skills. Nevertheless, the shared management strand managing authorities (MAs) surveyed indicate a moderate level of complementarity with 36% respondents considering that Erasmus+ is complementary to ESF+ to a large or moderate extent, and only 25% for Horizon Europe. Despite its similarities in some objectives between the EaSI strand and Horizon Europe, their focus is sufficiently different to ensure there is no unnecessary duplication, EaSI strand is focused on social experimentation and projects’ implementation while Horizon Europe focuses on innovation and knowledge generation. Notable example of complementarities between the ESF+/EaSI strand and Erasmus+ are the joint financing of the [EUROPASS](#) system<sup>197</sup> and the European Solidarity Corps<sup>198</sup> (notably with the labour mobility activities funded under the EaSI strand).

Other Union programmes fund social innovation complementary schemes such as the Single Market Programme from a business/entrepreneurship perspective or Interreg with a more territorial approach. The EaSI strand operational objectives also have complementarities with other programmes such as Citizens, Equality, Rights and Values programme (CERV)<sup>199</sup>, particularly the strand of CERV focused on citizens’ engagement and participation.

**There is also a good coherence between ESF+ and other EU funds active in supporting the digital and green transition in terms of objectives, legal texts and programming documents.** The ESF+ Regulation establishes the need to support the twin transitions, and this is coherent with the objectives of the other funds supporting digital and green transitions such as JTF, RRF, Digital Europe<sup>200</sup>, ERDF, Cohesion Fund, Horizon Europe, Erasmus+ and InvestEU. ESF+ is recognised as the key funding instrument to support the development of green and digital skills, while other funds support complementary investments in e.g. infrastructure, research and innovation, advanced or highly specialised digital skills.

The importance of digital and green transitions is recognized by all Member States in their programming documents as well as in the EaSI strand programming. Analysis of the

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support) for these small investment tickets with the aim of helping to overcome a market failure in the social investment market.

<sup>196</sup>These activities consist of contributing to the development of feasible, suitable, and reliable schemes or funds providing finance to social enterprises as well as support structures providing business development services and networking facilities to improve social enterprises’ investment readiness.

<sup>197</sup>See <https://europass.europa.eu/fr>.

<sup>198</sup>See [https://youth.europa.eu/solidarity\\_en](https://youth.europa.eu/solidarity_en).

<sup>199</sup>See <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/cerv>.

<sup>200</sup>The Digital Europe programme objectives are coherent with two ESF+ Specific Objectives mentioning digital skills – (e) and (g).

programming data shows that almost all (23) Member States have allocated specific funding to the digital transition, and 24 Member States allocated funding for green transition under shared management. The digital and green transitions goals are also increasingly mainstreamed in the EaSI strand actions; for instance, a call for proposals aiming to test social innovation approaches to foster green and digital transition in schools, training centres, at work and in local communities was launched in 2022. In practice, even where there are no specific funding allocations, mainstreaming of the focus on the digital and green transition within the ESF+ is carried out across all Member States through upskilling and reskilling activities to address the transitions, inclusion of the ‘Do No Significant Harm’ requirement, inclusion of a specific selection criterion for ESF+ operations/project, and by specific ESF+/ERDF programmes focusing on the transitions and transversal integration of the twin transitions into other labour market policies co-funded by ESF+. Yet, while the majority of stakeholders believe that there is a good complementarity between ESF+ and other EU funding instruments active in the green and digital transition, a minority of stakeholders believe that the focus on the twin transitions is not sufficient or that it is not yet possible to assess the degree of synergies between funding<sup>201</sup>.

There are several good examples of how synergies between funds are fostered, as well as operations which support the green and digital transition through combining funds. As described above, there remains nonetheless some potential for addressing overlaps, in particular between the ESF+, the RRF and JTF. Synergies between these funds could be improved through better defining key concepts (e.g. green jobs, green skills), further awareness-raising for all beneficiaries and potential beneficiaries on how to address the green and digital transitions, and more advanced planning across funds to avoid fragmentation of efforts.

**Internal coherence was analysed under the criterion of effectiveness, and concluded that ESF+ is internally coherent, i.e. both strands pursue consistent sets of objectives.** However, the synergies which were sought with the merger of ESF and EaSI, i.e. the additional effects stemming from the fact of working together in terms of transferring and scaling-up of innovative projects, have not materialised yet.

#### **4.2. How did the EU intervention make a difference and to whom?**

##### EU added value

Due to the delay in the implementation explained in Section 1.2, at the end of 2024, the results of the ESF+ operations only just started to emerge. At the end of 2024, ESF+ support reached 7.8 million persons

Despite the pickup in implementation and reporting observed in 2024, the available data remain too limited at the moment of conducting the evaluation to assess the EU added value. Nonetheless, previous evaluations and ongoing studies – such as the *ex post*

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<sup>201</sup>Ecorys, *Study supporting the mid-term evaluation of the ESF+ during the programming period 2021-2027*, 2025, page 128.

evaluation of the ESF 2007-2013<sup>202</sup>, the study supporting the *ex post* evaluation of the 2014-2020 ESF shared management programmes<sup>203</sup> and the EaSI programme *ex post* evaluation<sup>204</sup> – have found evidence about the former ESF and EaSI programmes' added value in terms of volume, scope, role and process effects (see [Annex IX](#)). Evidence collected for the current mid-term evaluation indicates persistency as concerns the types and extent of EU added value. In view of the stability in the fund's scope and the processes ensuring the programmes improved intervention logic, it is expected that very similar effects in terms of EU added value are materialising under ESF+ in the 2021-2027 programming period. This will be verified in the retrospective evaluation of both strands scheduled for 2030.

### 4.3. Is the intervention still relevant?

#### Relevance

The ESF+ was prepared in a policy context which was significantly different from the one in which its implementation started, mostly due to the Covid-19 pandemic and the impact of Russia's war of aggression on Ukraine. While the policy challenges identified in the ESF+ Impact Assessment (see Section 2.1) remain valid, some of them were exacerbated and new challenges emerged. Population aging and diminishing labour force aggravate the already existing labour and skills shortages undermining competitiveness and putting at the same time pressure on health and long-term care systems. Accelerating green and digital transitions increase the demand for skills, which were already needed. Increasing costs of living and lack of affordable housing intensifies the risk of poverty.

**The evaluation indicates that ESF+ continues to be a strategic instrument to address the EU policy priorities and national needs.** The ESF+ general objective to support Member States and regions to achieve high employment levels (Article 3.1 of the ESF+ regulation) remains highly relevant to the EU's priorities in the area of employment and the European Pillar of Social Rights Action Plan headline target of at least 78% of the population aged 20-64 being in employment by 2030. The ESF+ specific objectives (a) to (d) focus on various aspects of labour market integration, including on improving access to employment and activation measures; modernising labour market institutions; promoting gender-balanced labour market participation; and adaptation of workers and enterprises to change. The thematic concentration on youth unemployment (Article 7 of the ESF+ regulation) is further evidence of this relevance. It clearly responds to the needs faced by the specific group of youth, in the context of large variations across Member States in youth unemployment and NEET rates, and the fact that young people are typically impacted by a longer labour market integration, several job-to-job transitions, and the emergence of precarious forms of work. The EaSI strand also aims to address the employment and labour market needs by contributing to the voluntary geographical mobility of workers and increasing employment opportunities; the development of the market ecosystem around the provision of microfinance to microenterprises in start-up and development phases; the development of social enterprises and the emergence of a social

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<sup>202</sup>See [ESF 2007-2013 ex-post evaluation - Publications Office of the EU \(europa.eu\)](#).

<sup>203</sup>Ongoing.

<sup>204</sup>EaSI programme *ex post* evaluation Commission [Staff Working Document](#) SWD(2024) 146 final.

investment market; and the implementation of international social and labour standards (respectively points d, e, g and j of the Article 25 of the ESF+ regulation).

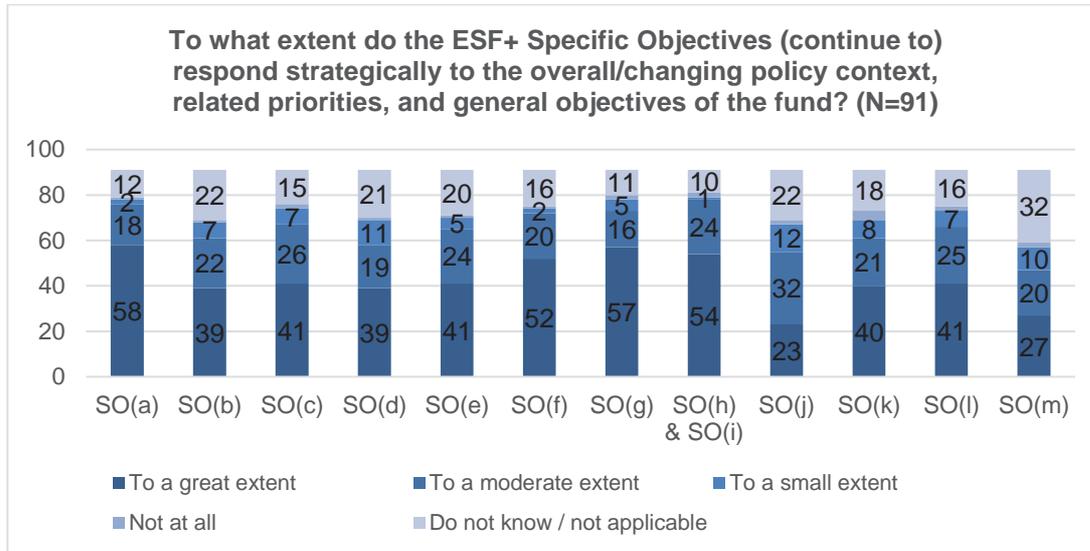
The ESF+ objective to support Member States and regions to achieve a skilled and resilient workforce ready for the future world of work (Article 3(1)) is highly relevant to the EU's priorities in the area of education and training, and the European Pillar of Social Rights Action Plan headline target of at least 60% of all adults in training every year by 2030. This is further reflected in the specific objectives (e) to (g), which focus inter alia on improving education and training systems, promoting equal access to quality and inclusive education and lifelong learning. The thematic concentration requirement on the implementation of the Child Guarantee (Article 7(3)) is also highly relevant to this context as two of the five service areas covered by the Guarantee are early childhood education and care and free education<sup>205</sup>. This is also highly relevant for women's labour market participation.

The ESF+ objective to support Member States and regions to achieve inclusive and cohesive societies aiming to eradicate poverty is highly relevant to the EU's priorities in the area of social inclusion and the European Pillar of Social Rights headline target of reducing the number of people at risk of poverty or social exclusion by at least 15 million compared to 2019. This is further reflected in the Specific Objectives (h) to (m) which aim inter alia to foster active inclusion, promote socio-economic integration of third-country nationals, enhance access to services and promote social integration of the most deprived people and address material deprivation. The thematic concentrations on implementation of the Child Guarantee, social inclusion and support to the most deprived are further evidence of the high degree of relevance of the ESF+ intervention logic to policy needs, as they reflect the severity of the challenges in terms of eradicating poverty, as well as the needs of specific vulnerable groups.

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<sup>205</sup>See <https://ec.europa.eu/social/main.jsp?catId=1428&langId=en>.

**Figure 9 – ESF+ SOs relevance to the overall/changing policy context, related priorities, and general objectives of the fund**



Source: Survey of ESF+ managing authorities (Study supporting the ESF+ mid-term evaluation; Ecorys, 2025)

This overall framework is confirmed by the results of the survey of ESF managing authorities who most often replied that the ESF+ Specific Objectives (continue to) respond strategically to the overall/changing policy context, related priorities, and general objectives of the fund to a great extent for all but one specific objective (SO(j)) (see Figure 9 above).

Stakeholder views gathered from the interviews, focus groups and survey data confirm the very high degree of relevance of the ESF+ intervention logic to the national priorities. Stakeholders interviewed from the majority of Member States (BE, BG, CZ, DE, DK, EE, ES, FI, FR, HR, IE, LT, LU, MT, PT, RO, SE, SK) and across different stakeholder types (managing authorities, ministries and beneficiaries) strongly held the view that the ESF+ is overall very relevant to national priorities. This is confirmed by survey evidence where the majority of respondents to the survey of MAs indicated that ESF+ Specific Objectives continue to respond strategically to stakeholders needs to a great extent (53 of 91 responses, 58%) or a moderate extent (33 of 91 responses, 36%).

Nevertheless, **some emerging challenges or priorities were identified by stakeholders as insufficiently covered.** The most commonly reported area was **housing and homelessness**. This was identified in several Member States (CZ, ES, IE, FR, LU, MT, PL, PT) and by a range of stakeholders interviewed and participating in the focus groups (ESF+ intermediate bodies, ministry representatives, academics and ESF+ beneficiaries) as an increasingly relevant area of intervention in the national context which is not fully captured by ESF+. In a few other Member States (HR, LU, LT, RO), **migration** was considered an area where ESF+ may not be fully adequate in addressing the challenges, although this was in most cases understood to be the case due to the highly politicised nature of the topic at the national level. Allocation data shows indeed that only 0.8% of resources across Member States were allocated to the Specific Objective on promoting the socio-economic integration of migrants (SO(i)). In addition, **gender equality** was reported

in some Member States (AT, CY, IE) as an angle not addressed sufficiently by the ESF+ intervention logic.

**The flexibility afforded to Member States to programme and reprogramme ESF+ under shared management in line with the changing policy context and priorities is a key factor ensuring the strand's continuous relevance.** The same is true for **the broad scope of ESF+ intervention** which allows to address a wide range of (emerging) problems based on the specific national needs<sup>206</sup>. The majority of respondents to the survey agreed or strongly agreed (61 of 91 responses, 67%) that programmes were responsive to policy changes. Flexibility and the breadth of the ESF+ intervention logic were also the factors most commonly reported in the interviews (e.g. BE, BG, CZ, ES, HR, LT, LU) as supporting **relevance to stakeholders needs**. Twenty interviewees and focus group participants (including organisations representing participants, ESF+ monitoring committee members and ESF beneficiaries) highlighted that flexibility in determining how the ESF+ is used needs to be assured also at regional and local level.

**A 'bottom-up approach' to determining needs is key in ensuring that ESF+ measures respond to challenges on the ground.** Involving regional and local actors in the process of designing ESF+ operations is necessary in this regard, as highlighted by focus group participants, who also raised the importance of allocating set budgets to local steering groups and communities to initiate projects in line with needs.

**The involvement of a range of stakeholders in the monitoring of ESF+ operations, through monitoring committees, was also seen as a factor facilitating the continued relevance of the ESF+ to a changing policy context.** This was cited by several European and national-level non-governmental organisations<sup>207</sup> active in the ESF+ in their response to the call for evidence<sup>208</sup> for this evaluation and identified in the desk research. Respondents to the open text question often mentioned 'partnerships' or 'stakeholder consultation' as a reason for the high degree of responsiveness of the ESF+ to stakeholder needs.

The concept of ensuring that the ESF+ benefits from bottom-up inputs into programming and implementation is reflected in the legislation and did not change comparing to the previous programming period. The ESF+ regulation explicitly places importance on partnership from the perspective of engaging social partners and civil society organisations (CSOs) in the delivery of employment, education and social inclusion policies supported by the ESF+ strand under shared management. The importance of allocating capacity-building support to facilitate such engagement, and partnership working/networking more broadly is also recognised. Article 8 of the Common Provisions Regulation (CPR) likewise enshrines the **partnership principle** and the significance of the bottom-up approach into programming via Partnership Agreements, as well as recognising the important role of sub-national authorities and non-state actors in the context of multi-level governance.

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<sup>206</sup>Reported by managing authorities, intermediate bodies, trade union representatives and beneficiaries in BE, CZ, EE, ES, FR, HR, LT, MT, SE and at European level.

<sup>207</sup>Federal Working Group of Non-Statutory Welfare (Germany), Eurodiaconia (EU), Red Cross EU (EU), Fundación Secretariado Gitano (Spain).

<sup>208</sup>See [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13746-European-Social-Fund-Plus-ESF+-mid-term-evaluation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13746-European-Social-Fund-Plus-ESF+-mid-term-evaluation_en).

Nevertheless, challenges in implementation of the partnership principle in practice remain. As highlighted in the Fit for Future platform Opinion on the ESF+ mid-term evaluation, the involvement of stakeholders is not always systematic and relevant stakeholders often lack resources and capacities to contribute to consultations on highly technical issues. It is also difficult and time-consuming to reconcile all interests, especially when partners are not willing to compromise and have unbalanced powers<sup>209</sup>.

The ESF+ intervention logic is also developed in the framework of other EU strategic governance processes. In this context, **the European Semester was mentioned by national stakeholders** (e.g. BG, ES, LU, PL) **as key in ensuring the high degree of relevance of the ESF+ intervention logic to national priorities**. Compared to the ESF, the ESF+ Regulation has reinforced the fund's strategic orientation towards the challenges identified in the European Semester, and in particular the Country-Specific Recommendations (CSRs). Whereas the ESF supported 'policies and actions *taking account* of the relevant Integrated Guidelines and relevant country-specific recommendations'<sup>210</sup>, the ESF+ obliges Member States '*prioritising* interventions that address the challenges identified in the European Semester, including in their national reform programmes as well as in the relevant country-specific recommendations'. To ensure the adopted programmes' strategic match with the European Semester, the Commission services included an assessment and an overview of priority areas for investment (Annex D) in the 2019 Country Reports. The investment priorities, aligned with the challenges identified in the country reports and with the country-specific recommendations, formed the basis for ESF+ programming. Moreover, in the mid-term of the programming period, Member States have to review the programmes by taking into account, among other elements, 'the new challenges identified in relevant country-specific recommendations adopted in 2024' (In the Common Provisions Regulation (CPR) Article 18 (1)(a)). To align the programmes to the 2024 European Semester cycle and to orient the Member States in their analysis, the Commission included in each country report boxes with the key priorities to consider in the programmes' mid-term review.

The outcome of the programming exercise is that the programmes are **broadly aligned in all Member States with the investment areas identified in the 2019 CSRs**, albeit with some specific objectives/key challenges being prioritised over others. Moreover, the stakeholders also confirmed the fund's focus on the policy challenges identified in the European Semester. The comparison between CSRs received and ESF+ allocations under relevant Specific Objectives ([Table P](#), Annex VI) shows that all EU Member States that received a CSR in 2019 corresponding to the policies advocated in SO(a), (d), (f), (g), (h), (j), (k), (l) and (m) allocated ESF+ budget to these specific objectives in their programmes. SO(b), (c), (e) and (i) show slightly lower, but still high level of alignment (78%, 83%, 88% and 80%, respectively<sup>211</sup>). There are only 6 Member States (i.e. EE, FR, IE, NL, PT,

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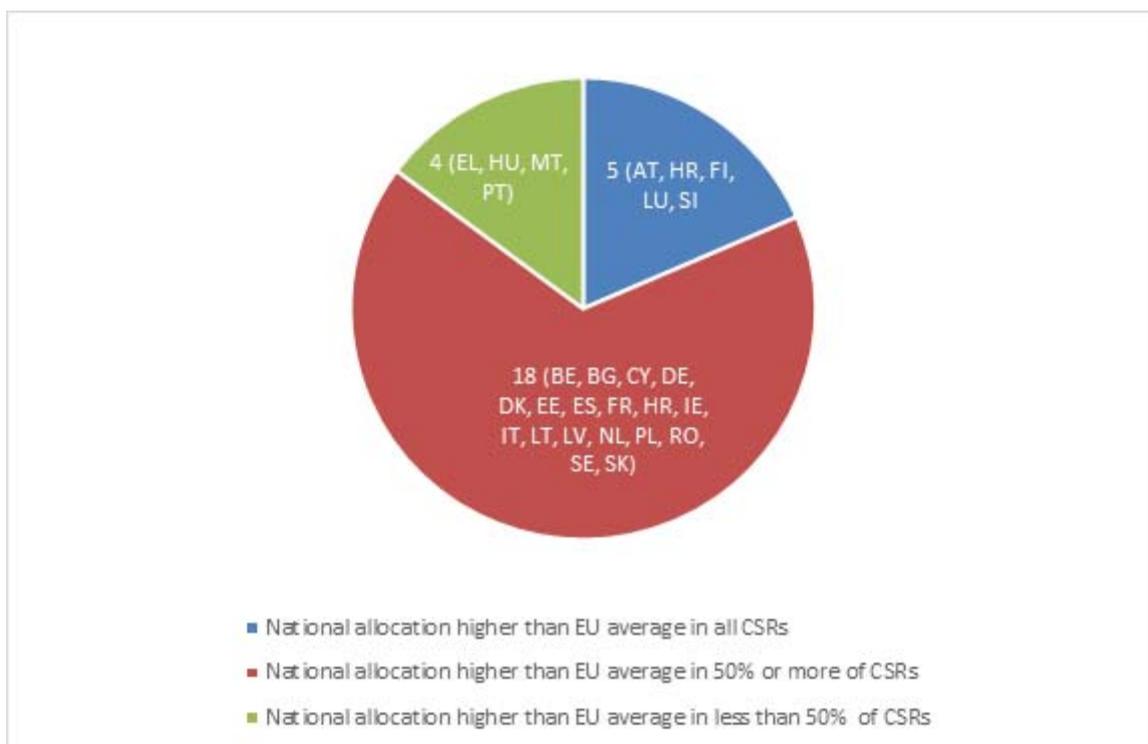
<sup>209</sup>Opinion on the Evaluation of European Social Fund Plus, Fit for Future Platform, pp.17-18. [Adopted opinions - European Commission](#)

<sup>210</sup>Regulation (EU) No 1304/2013 of the European Parliament and of the Council of 17 December 2013 on the European Social Fund and repealing Council Regulation (EC) No 1081/2006, Recital 3.

<sup>211</sup>It should be noted that alignment levels may also be influenced by the number of CSRs received that are relevant under a given SO. For instance, most EU Member States received CSRs under SO(a), with all of them allocating ESF+ resources to address them, whereas only four of the EU27 received recommendations relevant to SO(m) in 2019. Similarly, 18 out of the 27 EU Member States received CSRs relevant to SO(e),

SE) in which certain relevant CSRs were not addressed by the ESF+ programmes. Demonstrating the effect of regulatory requirement to prioritize the policy areas identified in the European Semester, Figure 10 shows that 23 Member States allocated more than the EU average to more than 50% of the SOs corresponding to their CSRs. In terms of actual spending, by end 2023 Member States selected operations ‘addressing challenges identified in the European Semester’ in the value of EUR 9 billion (38% of the total eligible cost).

**Figure 10 – ESF+ shared management allocation levels across Member States**



Source: Study supporting the ESF+ mid-term evaluation; Ecorys, 2025

The stakeholders’ perceptions are in line with the picture based on the programmes’ budgetary choices. More than 40 interviewees across most Member States (e.g. BG, CZ, DK, EE, ES, FI, IE, HR, LU, MT, NL, PL, PT, RO, SE, SI) and all stakeholder groups confirmed the strong level of alignment between the challenges highlighted as part of the European Semester and investments under ESF+. According to these stakeholders, Partnership Agreements and programmes show strong alignment with both National Reform Programmes and the European Semester. Between 5 to 10 interviewed representatives from ESF+ managing authorities, government representatives and other bodies in ESF+ monitoring committees (e.g. BG, LV, ES) attributed this result to the stronger focus on the CSRs embedded in the ESF+ regulation, which promoted stronger linkages and coordination. For example, an interviewed ESF+ Managing Authority in Czechia noted that a CSR on preventing school segregation for Roma children influenced the programming of the ESF+. Similarly, a government representative participating in the

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with 16 out of the 18 allocating ESF+ resources to address the recommendations received (i.e. 88% alignment), while only five countries received recommendations relevant to SO(i), with four of them earmarking resources (i.e. 80% alignment).

ESF+ monitoring committee recalled that programming documents include a focus on tackling unemployment through skills development, upskilling and reskilling as a result of the challenges highlighted in the 2019 CSRs. Alignment between the 2019 CSRs and ESF+ programming documents was also highlighted at the focus group, where, for example, a representative from the Ministry of Labour in Croatia highlighted the strong coordination between the key priorities identified in the country's single ESF+ programme and the CSRs.

However, a minority, four interviewees from ESF+ monitoring committees, ESF+ intermediate bodies, ESF+ beneficiaries and national ministries (e.g. ES, IE, LU) highlighted that alignment between the European Semesters and ESF+ allocations does not necessarily mean adequacy of investment levels. These are often influenced by e.g. availability of funding in national programmes or investments under other EU funding programmes. For example, organisations representing ESF+ beneficiaries in Luxembourg noted that child poverty is currently on the rise, and financial resources made available under the ESF+ are not sufficient to tackle the issue.

**ESF+ is also the main financial instrument used by the EU to support the implementation of the European Pillar of Social Rights (EPSR).** As the EU's main strategy for social policies, they set the framework for the formulation of the CSRs and the challenges identified in the European Semester.

**All the EPSR principles except one are addressed to a lesser or stronger degree by the ESF+ Specific Objectives (Table Q, Annex VI).** The only principle not addressed is (6) *Wages* because supporting wages does not fall under ESF+ scope. **EPSR principles which are most clearly aligned with ESF+ Specific Objectives include (1) Education, training and life-long learning, (2) Gender equality, (3) Equal opportunities, (4) Active support to employment, (9) Work-life balance and (10) Healthy, safe and well-adapted work environment and data protection.** EPSR principles which are less directly addressed by ESF+ Specific Objectives include (7) Information about employment conditions and protection in case of dismissals, (8) Social dialogue and involvement of workers, (13) Unemployment benefits, and (15) Old age income and pensions. Some EPSR principles are addressed by ESF+ in close collaboration with other funds, in particular the ERDF, such as (19) Housing and assistance for the homeless and (20) Access to essential services.

[Table Q](#) in Annex VI also provides a very broad indication of the overall financial investment of ESF+ shared management strand in each EPSR principle, based on the allocation to each (partially or fully) corresponding specific objective<sup>212</sup>. Using this very broad indication, **the largest ESF+ allocations correspond to EPSR principles: (3) Equal opportunities (EUR 71 139.1 million), (4) Active support to employment (EUR 49 669.7 million), (1) Education, training and lifelong learning (EUR 44 396.3 million) and (11) Childcare and support to children (EUR 31 077.6 million).** The lowest ESF+ allocations correspond to EPSR principles: (8) Social dialogue and involvement of workers

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<sup>212</sup>This analysis of ESF+ allocations can only be considered broadly indicative since several of the specific objectives (SOs) correspond only partially to specific EPSR principles, while the allocations provided represent the full allocation to each SO.

(EUR 1 724 million), (8) Work-life balance (EUR 3 600.7 million) and (2) Gender equality (EUR 3 600.7 million).

The results of the survey of ESF+ managing authorities clearly showed that the managing authorities consider that there is **good alignment between ESF+ and the EPSR principles**. Nearly 90% (81 of 91 responses) considered that ESF+ supported their country in delivering on the EPSR principles. The good alignment between the EPSR and ESF+ was also confirmed in interviews at both EU and national level and the focus groups conducted for the study, across both strands of the ESF+ and among different stakeholders (ESF+ coordinating bodies, beneficiaries, social partners, etc.). It should, however, be noted that several (5) did not answer this question since they were not familiar with the EPSR.

In EU-level interviews, three representatives from the European Commission (shared management strand) stated that they considered that the ESF+ was fully aligned with the EPSR, and that its specific objectives had been designed to reflect the EPSR principles.

A strong majority (over three-quarters) of interviewed national stakeholders representing different types of organisations (ESF managing authorities, ESF+ monitoring committee members including social partners, ESF+ beneficiaries) who answered this question agreed that the ESF+ plays a significant role in supporting the implementation of the EPSR. A Croatian research institution emphasised the importance of ESF+ funding to support EPSR principles: ‘ESF+ supports important aspects of EPSR. Without ESF+, investments would be lower.’ An ESF+ intermediate body in Poland stated that ‘ESF+ is the only fund that can support the objectives of the EPSR. Unfortunately, there are no funds of this type at national or regional level, so ESF+ is the only instrument of this type.’

**The evaluation shows that the actions and priorities set out in the EaSI strand Annual Work Programmes (AWPs)<sup>213</sup> are in line with the EPSR principles.** Indeed, each 2021-2024 work programme states explicitly that ‘the overall political priority is to implement the EPSR in line with its Action Plan’ and each planned activity indicates the specific EPSR principles which they are intended to support<sup>214</sup>. Although mentioned in the context of wider projects (e.g. those related to posting of workers) or covered to some extent through the support to EU-level NGOs networks, the EPSR principles least addressed by EaSI strand to date are the ‘gender equality’ (2), ‘wages’ (6), ‘social dialogue and involvement of workers’ (8) and ‘work-life balance’ (9).

**The AWPs also include activities addressing emerging issues at the top of the EU agenda** such as the aftermath of Covid-19 and the Russian war of aggression in Ukraine<sup>215</sup>. Additionally, they focus on supporting the transition of young people into work, in line

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<sup>213</sup>[https://ec.europa.eu/social/main.jsp?pager.offset=0&advSearchKey=ESFannualworkprogramme&mode=advancedSubmit&catId=22&doc\\_submit=&policyArea=0&policyAreaSub=0&country=0&year=0&iframe=true](https://ec.europa.eu/social/main.jsp?pager.offset=0&advSearchKey=ESFannualworkprogramme&mode=advancedSubmit&catId=22&doc_submit=&policyArea=0&policyAreaSub=0&country=0&year=0&iframe=true)

<sup>214</sup>Table R in Annex VI sets out the correspondence between the overall priorities of the EaSI strand (as set out in the annual work programmes 2021-2023) and the EPSR principles and provides some indicative (non-exhaustive) examples of corresponding activities funded by the EaSI strand.

<sup>215</sup>For instance, the call for proposals ‘Innovative Approaches to Mitigate the Societal Consequences of Russia’s War of Aggression Against Ukraine within EU Member States’ (indicative budget EUR 22 million; indicative date for projects’ award end-October 2024).

with the European Year of Youth in 2022, and the European Year of Skills in 2023. According to the largest share of these stakeholders (46%, 32 of 69 responses), the EaSI strand adequately addressed key policy challenges and priorities at the EU level to a great extent. Nearly an equal share of these stakeholders (45%, 31 of 69 responses) considered that they were addressed to a moderate extent. No stakeholders reported that the EaSI strand fails to address key challenges and priorities at the EU level and only five respondents had no opinion.

**The EU policy priorities related to the green and digital transitions have been addressed to a lesser degree.** Although several activities<sup>216</sup> were supported, including a specific call for proposals launched in 2022 under the EaSI strand on ‘Social innovations for a fair green and digital transition’ (EUR 10 million)<sup>217</sup> and the EaSI AWP for 2021 mentions that support for social inclusion and microfinance is mitigating the effects of the twin transitions<sup>218</sup>, the evaluation shows that overall there is still limited explicit mention to this specific priority in the strand’s AWP. Though several activities<sup>219</sup>, including calls for proposals on these topics were launched in 2021-2024<sup>220</sup>, consulted EU-level and national-level NGOs suggest that youth poverty, homelessness, housing, and socio-economic determinants of health are other issues that could have not been sufficiently addressed under the EaSI strand. These stakeholders also pointed to the need to emphasise interventions in rural, mountainous, island or otherwise remote regions.

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<sup>216</sup>Among the activities to contribute to the green transition financed by the EaSI strand are reports related to ‘Sources and mitigation of carbon inequality and environmental footprint inequality’ and on ‘Measuring the green economy and the associate skills’. DG EMPL also launched under the EaSI strand a new cooperation agreement with the ILO covering analyses on just transition and capacity-building activities. Through its agreement with the ILO, DG EMPL also helped fund the ‘Just Transition Pavilion’ at the annual UN climate Conference of the Parties COP-28 in Dubai. Moreover, an EMPL-JRC project was set up to assess the synergies between the green and digital transitions, considering dimensions such as gender, demographic change, urbanisation, and income distribution. This project builds on the existing COLLEEM (COLLaborative Economy and EMployment)/Future Jobs project, which developed analytical and survey tools to assess the share of platform workers in the economy. The aim of the project is to extend and refine the tools and analysis in the light of the Digital Agenda/Decade and the Declaration of digital rights and principles, to strengthen evidence and policy analysis on the employment and social dimension of digitalisation, AI and algorithmic management.

<sup>217</sup>See <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/esf-2022-soc-innov>.

<sup>218</sup>In this respect, a call for proposals to promote ‘Actions to develop impact performance intelligence services for the social impact investing market actors’ (EUR 5.7 million) was launched in 2024.

<sup>219</sup>One example is the contribution agreement with WHO on building more accessible, better quality and resilient long-term care systems through tools and policy advice for the implementation of the Long-Term Care (LTC) Recommendation.

<sup>220</sup>Several calls for proposals addressing these issues were launched in 2021-2024, for instance ‘Social innovation practices to combat homelessness’; ‘Social Innovations for the Upskilling of Vulnerable Youth, Especially Young People not in Employment, Education, or Training’, ‘Innovative Approaches Tackling Long-Term Unemployment’; the ALMA call (Aim-Learn-Master-Achieve) which is an active inclusion initiative to empower the most vulnerable young people aged 18 to 29. Moreover, for 2025, two calls are planned: one to ‘Promote innovative approaches to implement the Disability Employment Package’ and another to support ‘Child poverty and the implementation of the European Child Guarantee’. Additionally, recurrent calls are launched to support the EURES Targeted Mobility Schemes (TMS) and EU-level NGOs networks active in the area of social inclusion, including those supporting microfinance and social enterprise finance.

**The evidence collected suggests that EaSI strand action is also relevant to stakeholder needs, notably support to vulnerable people.** Consulted EU-level civil society organisations (CSOs)<sup>221</sup> acknowledged that their voice is being heard by the European Commission through structured consultations as well as through other ad-hoc exchanges via email or meetings. It is also worth noting that the EaSI AWP feature on the agenda of the ESF+ Committee, contributing to their alignment with Member States' needs at the national level. Nevertheless, stakeholders participating in the two focus groups<sup>222</sup> think that the calls for proposals are often too prescriptive, leaving little space for organisations to tailor their projects to answer local needs.

**The evaluation also shows that the budget of the EaSI strand is more flexible to respond to policy priorities and stakeholders' needs than in the previous programming period<sup>223</sup>.** Consulted European Commission officials confirmed that in terms of resources allocation, compared with the previous programming period, ESF+ allows additional flexibility in using resources within the funds and better fine-tuning them during the programming period. Moreover, the resources allocation within the EaSI strand focuses increasingly now on balancing competing needs and priorities, while the previous boundaries between axes have been completely removed.

Available evidence also suggests that the EaSI strand demonstrates some degree of budgetary flexibility to respond to stakeholder needs in terms of reallocating funds between the work packages of their projects. For instance, an EU-level CSO active in the field of social inclusion reported using this option to re-allocate funding to another work package where more resources were needed.

A limited number (6) of consulted project promoters also noted some rigidities regarding the budget and its use. For example, one EU-level CSO reported challenges in using EaSI strand funding to reimburse participants from non-EU countries in EaSI strand events, whereas another advocated for more flexibility to cover unexpected costs, for example for the indexation of salaries. Equally, a Ministry from Greece suggested that some flexibility in the payment of instalments could facilitate the implementation of projects as currently there can be imbalances between when payments are made and when funds are needed.

**ESF+ continues to be relevant, also considering future trends and priorities.** Currently, ESF+ resources are quite evenly distributed across the three main policy areas—employment, social inclusion, and education. These priorities align with the key areas of action identified in the Strategic Foresight Report 2023<sup>224</sup>. The report emphasizes the need

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<sup>221</sup>The ESF+ Regulation foresees the involvement of EU-level civil society organisations (CSOs) and social partners in the preparation of the EaSI AWPs in line with the Article 39(8).

<sup>222</sup>Two focus groups were conducted during the study supporting the ESF+ mid-term evaluation: one with the EaSI strand stakeholders and another with the shared management managing authorities.

<sup>223</sup>The EaSI programme Regulation defined an indicative budget allocation for each of its three axes and indicative breakdowns of allocations between the thematic areas within each axis. Although the EaSI Regulation included a flexibility clause to adjust funding among its three axes, the programme's *ex post* evaluation shown that it was in practice ineffective due to the administrative burden generated by any budgetary redeployment.

<sup>224</sup>Communication from the Commission to the European Parliament and the Council 2023 Strategic Foresight Report Strategic Foresight Report Sustainability and people's wellbeing at the heart of Europe's Open Strategic Autonomy. COM(2023) 376 final:

<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52023DC0376>

for inclusive labour markets that support participation among all segments of the population, notably women, persons with disabilities, the elderly, young people, and other underrepresented groups who are neither in employment, education, nor training. These needs correspond to ESF+ specific objectives SO(a), SO(c), and SO(h).

Additionally, the Foresight Report highlights the importance of effective migrant integration, which aligns with SO(i). It also argues that workplaces and working conditions need to be adapted to new types of jobs, generational expectations, and workers' needs, corresponding to SO(b) and SO(d). In the area of social inclusion, there will be a continued need to develop inclusive, high-quality social services that enhance people's capabilities, adapt social protection systems (SO(k)), and reduce inequalities and social exclusion (SO(h), SO(j), SO(l), and SO(m)). Lastly, Action Eight of the Foresight Report focuses on ensuring that everyone can successfully contribute to the sustainability transition. In this respect, quality and inclusive education and training are key, as reflected in ESF+ SO(e), SO(f), and SO(g).

**ESF+ remains broadly relevant in the context of the EU's emerging needs related to competitiveness and growth policies, as identified in the Draghi report<sup>225</sup>, although further analysis and subsequent adjustments may be necessary.** ESF+ has allocated roughly one-third of its funding to social inclusion, aligning with the premise of the Draghi report that the European approach must ensure that productivity growth and social inclusion go hand in hand. ESF+ investments are also aligned with the report's emphasis on education and skills and its call for a strategy to address skills gaps.

A significant share of ESF+ funding is dedicated to lifelong learning and education, including skills anticipation and the labour market relevance of education and training systems (SO(b), SO(e), SO(f), SO(g)), as well as investments in digital skills). However, the Draghi report also suggests shortcomings in delivering skills policies, such as insufficient industry involvement in developing job-specific skills, a lack of systematic evaluation of effectiveness, underuse of skills intelligence, and insufficient targeted interventions to address skills shortages—particularly in technical and STEM (Science, Technology, Engineering, and Mathematics) fields and in specific sectors. These elements are broadly covered in the ESF+ programmes, but given the low implementation of ESF+, it is not yet possible to assess the extent to which ESF+ investments address these shortcomings, as a more detailed analysis would be required at a later stage.

**Enabling conditions have strengthened the relevance of the ESF+.** In some Member States, the necessary preconditions for effective policy implementation were not fulfilled at the time of programming. In these cases, the enabling conditions contributed to the establishment of the necessary policy and regulatory frameworks. Additionally, based on the evidence from the desk research and interviews with EU and national level stakeholders, enabling conditions and the monitoring of their constant fulfilment are generally regarded as relevant across all Member States.

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<sup>225</sup>[https://commission.europa.eu/topics/eu-competitiveness/draghi-report\\_en#paragraph\\_47059](https://commission.europa.eu/topics/eu-competitiveness/draghi-report_en#paragraph_47059)

## 5. WHAT ARE THE CONCLUSIONS AND LESSONS LEARNED?

### 5.1. Conclusions

As discussed in the previous sections, the first general conclusion which emerges from this evaluation is that **the regulatory deadline to deliver the evaluation was formulated rigidly** and did not allow taking into account the delay in implementation of ESF+, in particular the shared management strand. In consequence, a conclusive analysis of the fund's intermediate results was not possible. The assessment of effectiveness and efficiency of the changes introduced in the design of ESF+ remained only partially conclusive due to early stage of implementation. Nonetheless, it is possible to draw some conclusions and lessons learnt to be taken into account in the ongoing implementation. They should be read with the methodological constraints described in Section 1.3 in mind.

#### *Effectiveness*

- **The evaluation provided mixed evidence of the effects of the merger of former ESF, YEI, FEAD and EaSI. The effects identified depended heavily on how similar the former funds were in terms of implementation and management mode. Common objectives were not sufficient to ensure synergies and complementarities on the ground.**
  - The advantages of a merger of funds were most commonly identified in the stakeholders' opinions about the merger of former ESF and YEI. Such advantages included more streamlined and simplified management processes, greater flexibility in transferring funds depending on changing needs, and a more streamlined approach to implementation. The positive opinions about the impact of the merger were linked to strong complementarities between ESF and the YEI in the previous programming period (2014-2020) both in terms of target groups (young people not in employment, education or training) and areas of action (employment support).
  - The positive effects of the merger of ESF and FEAD were reported in particular in the Member States that included ESF and FEAD-types of activities in one programme. However, complementarities between the operations dedicated to the most deprived and the "mainstream" ESF+ operations require strategic programming and additional efforts from the managing authorities' side to produce results at the level of end-recipients.
  - The evidence collected suggests that a common legal basis for ESF and EaSI did not automatically lead to more synergies between the ESF+ shared management strand and the EaSI strand. Different modes of implementation, procedures, timelines of programming, level of governance, stakeholders and type of activities constitute multiple challenges. Additional efforts, both at the EU and national levels, as well as more time are necessary for the synergies to occur.
  - The Social Innovation Plus Initiative as well as other mechanisms, incentives, platforms and actors involved in both strands are considered as having the potential to ensure better synergies/communication between them, but it is too

early to assess whether this will lead to scaling-up under the shared management strand of social innovation projects tested under the EaSI strand. At the same time, the complexity of the ESF+ design as regards its social innovation scheme and the ensuing risk of fragmentation of its components may create confusion among stakeholders and require a large investment of time and resources to navigate.

- **Thanks to the requirement to dedicate a priority to social innovation and the increased EU co-financing rate, the amount dedicated to social innovation under the shared management almost doubled compared to the previous programming period.** However, while the programmes refer to social innovation (in line with Article 14 of the ESF+ Regulation), there is no direct reference to the EaSI strand projects and to their potential for upscaling. This could signal that Member States are not interested in or have not yet envisaged upscaling projects experimented under the EaSI strand.
- **Thematic concentrations played an important role in ensuring that Member States continue to support areas which previously had dedicated funding.** The allocation focused on support to NEET remained at the same level in ESF+ as under YEI and the allocation for most deprived under ESF+ increased compared to FEAD.
- **Enabling conditions have been generally successful** in ensuring that the necessary preconditions for effective implementation of the ESF+ are in place.

#### *Efficiency*

- Estimates suggest that the **administrative costs for programme authorities are comparatively low, but they are frontloaded** at the beginning of the period and are expected to decrease in relative terms as implementation progresses.
- **The simplification measures introduced in ESF+ are generally perceived as leading to streamlining of the processes and reduction of the administrative burden.**
  - A more proportionate approach to audits and a reduction in the number of verifications have likely resulted in significant efficiency gains. Moderate efficiency gains have also likely been achieved through simpler rules on management costs and fees and streamlined payment applications.
  - The merger of funds has likely produced efficiency gains due to streamlined programming and implementation rules. Also, the number of programmes under shared management decreased as well as the number of indicators used in both strands for the monitoring and reporting.
  - Measures to streamline the programming process are assessed positively, but the programming process and programming documents are still regarded as complex.
  - Enabling conditions are generally assessed as useful by stakeholders and have prompted the Member States to put in place the necessary regulatory and legislative framework for effective use of Union funding, but there is no evidence that the simplifications introduced in the current period have led to

cost reductions. Monitoring and reporting of fulfilment of enabling conditions is still considered burdensome.

- For the EaSI strand, the application and reporting processes have been simplified by the use of new corporate tools (Tender&Calls Portal and eGrants). However, challenges remain in terms of user-friendliness of the eGrants system for applicants. Also, the application and reporting processes remain burdensome, in particular for small organisations and for the operating grants beneficiaries (the EU-level NGO networks) with limited resources. This issue is further compounded by the steep learning curve associated with adopting the new system.
- The information about EaSI strand activities is fragmented across several websites (Tender&Calls Portal, DG EMPL and ESFA), which can potentially be confusing for the general public. Some confusion at stakeholders' level was identified between the roles of the National Contact Points (NCPs) that disseminate information on the EaSI strand in general and of the National Competence Centres for Social Innovation (NCCs) that focus on social innovation aspects within the ESF+ shared management strand.
- **The use of simplified cost options (SCOs) has significantly increased contributing to a reduced administrative burden. The uptake of financing not linked to costs (FNLCs) is increasing, but still low.**
  - The stakeholders perceive the main advantage of the SCOs to be the reduction of administrative burden for beneficiaries and managing authorities, simplification of management process and facilitation of payments.
  - One of the key challenges to the uptake and effective implementation of simplification modalities is the high initial investment in the design and agreement over the simplification tools, which entails (time/staff) costs for administrations and beneficiaries that are not offset (initially) by the ensuing reduction in administrative burden (derived from their implementation).
  - National rules that may counteract the benefits of simplification are significant impeding factors for both SCOs and FNLCs in some countries.
  - The main factors hindering setting up FNLCs schemes include concerns about future audits, potential financial impact on beneficiaries if programmes do not perform as expected, incentives to select participants that are more likely to achieve the expected output or result, and difficulties in demonstrating that intended goals have been achieved;
  - There is insufficient awareness among stakeholders about the available guidance and future audit requirements.
  - While there is still limited experience with unit costs reporting under the EaSI strand (the action grants supporting the NCPs establishment and the travel/accommodation expenses under operating grants for the EU-level NGO networks), the evaluation shows that this modality imposes increased burden on these project implementers both in application/reporting phases.

- The use of digital tools is not sufficiently streamlined, notably in the domain of reporting of monitoring data.
- Administrative register data is not sufficiently used for monitoring purposes due to uncertainties regarding the legal basis for re-using personal data, complex processes and interoperability challenges.

### *Coherence*

- The ESF+ Regulation, as well as the regulations relating to the other EU funding instruments, provide **a strong legal basis to promote coherence and avoid overlap for its both strands**. ESF+ programming is coherent in its objectives with other EU funding instruments active in human capital investment. National-level programming, including Partnership Agreements and ESF+ programmes, also includes specific provisions and mechanisms to foster complementarity with other funds.
- **Under shared management instruments, complementarities are clearest between the ERDF and ESF+**. Many large EU-funded interventions include complementary funding from the ERDF and ESF+ for clearly distinct dimensions (e.g. infrastructure investments for ERDF, human capital investments for ESF+).
- There is **good coherence and complementarity between the objectives of the ESF+ and both RRF and JTF**, but some overlapping priorities could lead to substitution effects and create challenges in implementation. The existence of enabling conditions for the ESF+, which are absent in the RRF, may result in a lack of coherence between the two instruments.
- **There is also overall good complementarity between ESF+ and AMIF**, both in objectives and in implementation, similarly showing a clear demarcation of the types of activities supported by each fund and good examples of synergies.
- There is **good coherence in terms of objectives with Erasmus+ and Horizon Europe**, but the complementarities in the implementation of actions at the national level are relatively limited for the ESF+ shared management strand, while there are **good complementarities and no evidence of overlaps for the EaSI strand**.
- Although the objectives are coherent, the limited commonalities between them have resulted, in practice, in a **limited degree of complementarities between ESF+ shared management strand and the Cohesion Fund, CAP 2023-2027, EU4Health and EMFAF**.
- Due to relatively small size of the EGF, the **potential for large scale complementarities between ESF+ and EGF is limited**.
- For the EaSI strand, **complementarity with InvestEU is good**, notably because of capacity building activities provided through grants related to the use of microcredit facilities under InvestEU.
- Challenges still exist in terms of ensuring **synergies in implementation between ESF+ and other EU funding instruments active in human capital investment**. Obstacles to implementing synergies include differences in timings of application procedures, nature and rules of calls for proposals, geographical focus (transnational

vs. national/regional), governance level (EU vs. national/regional) and lack of awareness/support from ESF+ managing authorities about seeking synergies with other funds.

#### *EU Added Value*

- The implementation of the ESF+ operations was not sufficiently advanced to analyse the EU value added of the ESF+ funding.
- Based on the evaluations of the previous programming periods, which point into a certain **stability of both ESF+ strands' value added**, it is expected that similar volume, scope, role and process effects are being produced by the operations currently implemented.
- This will be verified in the **retrospective evaluation** of both strands scheduled for 2030.

#### *Relevance*

- The ESF+ intervention logic strategically **responds to a large extent to the overall policy context and related priorities in the EU**. The main challenges in the employment, skills and social policy area are fully addressed by the general objectives of the fund.
- **The ability to (re)allocate funding based on changing/emerging needs**, breadth in terms of policy objectives and involvement of relevant stakeholders are key factors in ensuring ESF+ continued relevance.
- The **link between cohesion funds and the European Semester in the ESF+ regulation** has been strengthened. The new rules require that Member States allocate 'an appropriate amount' to address the challenges identified in the Semester. Moreover, the CSRs also orient the mid-term review. There is strong alignment with priority issues identified in the European Semester process, particularly at programming stage.
  - However, as CSRs are relatively broad, evidence of a direct correlation between the European Semester and ESF+ is difficult to identify.
  - Furthermore, the alignment between the European Semester and ESF+ allocations cannot guarantee the adequacy of investment levels.
- Main **key priority areas across the EaSI strand** (education and training; labour market and labour mobility; social protection and active inclusion; and working conditions) are **adequately covered** in the strand's Annual Work Programmes and subsequent grants and tenders.
- ESF+ is the main EU financial instrument to support the implementation of the European Pillar of Social Rights (EPSR) that provides a comprehensive political framework for defining its goals. **All the principles of EPSR which fall in the thematic scope of ESF+ are addressed by the fund**. The challenges which Member States face in relation to the implementation of the EPSR principles have also guided the national and regional priorities for ESF+ funding.
- ESF+ continues to be broadly **relevant also considering future trends and priorities**.

- Stakeholders reported that **some emerging challenges** such as housing, homelessness, migration, green and digital transitions and gender equality **may not be sufficiently covered** by the ESF+.
- The evaluation of the **EaSI strand** has demonstrated that, while support has been provided to policy development in critical areas — such as job creation, promoting gender equality, supporting older workers, combating youth poverty, reducing homelessness, improving housing availability, tackling the socio-economic determinants of health, and advancing the inclusion of persons with disabilities - there remains an **ongoing demand for even greater support in these fields**. The evaluation also pointed out that such demand is particularly significant in rural, mountainous, island, and other remote regions.

## 5.2. Lessons learned

As a general lesson learnt, a certain degree of **flexibility in setting the deadlines in the legislation for presenting a mid-term evaluation** would allow to factor in exceptional circumstances and conduct the evaluation when the implementation is sufficiently advanced to provide a meaningful analysis of all criteria required by the legislation and the Better Regulation Guidelines.

In relation to the detailed findings of the evaluation, the following lessons learnt were formulated:

### *Effectiveness*

- Merging of funds requires a careful consideration of the existing similarities at the implementation level and of the mechanisms needed for the effects of the merger to materialise.
- Further support to ESF+ managing authorities in the identification of relevant and effective social innovation projects with rigorously assessed impacts indicating a high potential for scalability and transferability would be beneficial for the effectiveness of the ESF and EaSI merger.
- Outreach to EU and national-level social innovation stakeholders is important to ensure that a larger and more varied pool of organisations is aware of the existence of social innovation funding opportunities at both EU and national levels.
  - This could be achieved by further mobilising and empowering platforms already available, such as NCPs, NCCs, and CoPs.
  - When promoting social innovation interventions among managing authorities (e.g. in the framework of the Social Innovation Plus Initiative), it could be important to use evidence of concrete impacts for example from the former EaSI programme and current EaSI strand projects or other programmes of social innovation (national, European or extra EU).
- Testing and evaluating innovative solutions before scaling them up is instrumental in improving the efficiency of the policies. To improve the impact of social

experimentation, it is important to promote the use of rigorous methods (such as counterfactual impact evaluation) to gather the evidence base on the projects' up-scaling potential.

- Ensuring that authorities managing the “mainstream” shared management actions and the support to the most deprived cooperate closely is key to increasing complementarity between these two types of support. This could involve systematic cooperation with NGOs and local and regional actors in the design and implementation of measures for the most deprived. Managing authorities could establish clear processes and mechanisms to ensure that participants under SO(m) measures are guided to measures under the mainstream shared management SOs.
- When the implementation of the interventions is more advanced, it is also important to assess unintended effects. This requires designing evaluation methodologies in a timely manner and possibly launching special surveys.
- Enabling conditions help to ensure that the necessary preconditions for effective and efficient implementation of the Union funds are in place.

### *Efficiency*

- There is still room for more simplification under the shared-management strand.
  - There is scope to improve proportionality and make the monitoring and reporting of fulfilment of enabling conditions less burdensome.
  - The programming process and documents could be further simplified.
  - There is scope to streamline the use of digital tools, including ensuring interoperability with the national systems.
  - Extending the use of the SCOs and FNLC may be challenging in Member States where national rules and regulations cancel out the benefits of simplification.
  - There is scope to explore how to reduce the initial costs of setting up an SCO and FNLCs scheme and raise the awareness among stakeholders about the available guidance and future audit requirements.
- To facilitate future evaluations of the impacts of the ESF+, reduce reporting costs, and improve the quality of monitoring data, enhancing access to administrative data is crucial. In this regard, it is important to ensure a clear legal basis for accessing such data.
- It is important to provide additional support and/or guidance (written guidance, online training) to EaSI beneficiaries/project promoters about how to define and report unit costs for simplified cost options.
- More attention could be paid to facilitate access to the EaSI strand funding for smaller organisations (with less expertise in application procedures, more limited human resources, and lesser access to cofinancing) by exploring means of alerting potential applicants (for instance via the National Contact Points and other existing platforms/structures).

- The visibility of EaSI strand calls could be improved across the EU Funding&Tenders Portal, the ESF+ website and the ESFA website, including as regards the timelines for application and selection procedures. Providing one interface for publishing the EaSI strand calls and standard requirements to the users would imply – from a technical point of view - to align ESFA calls with the Commission criteria/requirements based on the eGrants format and the DG EMPL template.

### *Coherence*

- Although there is good coherence between the objectives of ESF+ and other EU funds active in human capital investment, it is important to foster and facilitate concrete complementarities in implementation.
- The following factors are found to be conducive to increasing complementarities between ESF+ and other funds investing in human capital: early strategic planning; common objectives and provisions for synergies in the regulations and national planning documents; alignment of rules and timing across different funding instruments; increased awareness among ESF+ managing authorities about seeking complementarities with other funds; establishment of coordination mechanisms; and dedicated reporting on complementarities and demarcations between funds.
- At EU level, there could be more in-depth and more regular overview and analysis of the complementarities across different relevant funds, to maximise the potential and to target synergies in specific fields (e.g., on the development of digital skills via ESF+, Digital Europe, ERDF, RRF, Horizon Europe).
- Clearer demarcation between funds or merging of similar funds is crucial to address potential substitution effects and implementation challenges between ESF+ and other funding instruments that invest in similar priorities and activities.
- To improve synergies between the ESF+ and the RRF and JTF in the area of green transitions, it is important to better define key concepts (e.g. green jobs, green skills), further raise awareness for all beneficiaries and potential beneficiaries on how to address the green and digital transitions, and advance planning across funds to avoid fragmentation of efforts.

### *Relevance*

- It is important to ensure that processes for reprogramming/reallocating funds continue to be straightforward and rapid and that relevant actors, including social partners and organisations representing target groups, are consulted meaningfully and systematically when designing, implementing and monitoring ESF+ operations.
- It is also important to continue synergies between the European Semester and the ESF+ while allowing Member States a certain degree of flexibility to prioritise investments, also taking into account national-level resources and budgets.

## ANNEX I. PROCEDURAL INFORMATION

This evaluation was carried out by DG EMPL as an initiative published in Decide with the reference number PLAN/2023/406. A public consultation was not launched as the general public does not have the specific knowledge on the ESF+ programming process, which was in the focus of this evaluation. Moreover, in parallel the 2014-2020 ESF ex-post evaluation was carried out and included a public consultation. Running simultaneously two public consultations on the same instrument would have added to the stakeholders' fatigue. An interservice group (ISG) was set up in March 2023, which included the following DGs: EMPL, AGRI, EAC, HOME, JUST, MARE, REGIO, RTD, SANTE and SG.

The timeframe for the evaluation was as follows:

24 March 2023	1st meeting of the ISG to discuss the technical specifications for the supporting study
12 May 2023	Request for services for the external study to underpin the evaluation launched
6 September 2023	Signature of the contract for the study with the consortium Ecorys – Ismeri – 3s
13 September 2023	2nd meeting of the ISG: kick-off meeting for the study
9 November 2023	3rd meeting of the ISG: draft inception report of the study
16 Jan -13 Feb 2024	Call for evidence feedback period
14 March 2024	4 <sup>th</sup> meeting of the ISG: draft interim report of the study
16 July 2024	5 <sup>th</sup> meeting of the ISG: draft final report of the study
5 September 2024	Revised final report of the study
4 November 2024	6 <sup>th</sup> meeting of the ISG: draft staff working document
2 December 2024	Approval of the external study
11 December 2024	Regulatory Scrutiny Board meeting
6 June 2025	Interservice consultation launched
23 June 2025	Interservice consultation answers received

The evaluation was based on a study carried out by an external team of experts, under contract (VC/2023/0287) through DG EMPL Multiple Framework Contract VT/2020/027 for the provision of services related to the implementation of the Better Regulation Guidelines. The interservice group assessed the quality of the final report of the external contractor as good. The conclusions and findings of the evaluation are considered to be robust, mindful of the limitations and mitigating measures described in [Annex II](#).

The evaluation was selected for the scrutiny of the Regulatory Scrutiny Board (RSB). The evaluation staff working document was discussed at the meeting on 11 December 2024. The RSB issued a positive opinion with reservations on 13 December 2024. The table below shows how this report took into account the RSB comments before launching the inter-service consultation.

<b>RSB comments</b>	<b>How and where comments have been addressed</b>
<b>Summary:</b>	The SWD has been significantly amended in order to take on board the RSB

<p>The Board notes the additional information provided and commitments to make changes to the report.</p> <p>However, the report still contains shortcomings. The Board gives a positive opinion with reservations because it expects the lead Service to rectify the following aspects:</p> <p>(1) The intervention logic is not sufficiently clear in terms of the underlying theory of change to explain the Fund’s contribution to the expected impacts and causal link between expected results and expected impacts.</p> <p>(2) The relevance of the Fund in view of evolving policy needs and competitiveness pressures is not sufficiently analysed. The report does not provide sufficient reflection on potential unintended consequences and related data needs.</p> <p>(3) The lessons learned do not sufficiently address the weaknesses in the monitoring and reporting framework and data needs for the final impact evaluation.</p>	<p>comments included in the 13 December opinion and in the quality checklist received from the RSB on 5 December. See below the main changes to address the points to improve.</p>
<p><b>What to improve:</b></p> <p>(1) The report should critically assess whether the intervention logic provides sufficient information on the underlying theory of change and how the intervention logic can serve to evaluate the Fund’s effectiveness, efficiency, and EU-added value. It should establish an intervention logic based on a clear theory of change to inform better about the expected causality, in particular between expected results and expected impacts. Based on the comprehensive intervention logic, the report should reflect on what additional KPIs may be needed together with corresponding methods and data needs, including the potential use of administrative data. The report should reflect on how the results of counterfactual impact evaluations at micro level will be aggregated to inform the final evaluation.</p>	<p>The intervention logic’s description was complemented with additional elements to showcase the feedback loops and types of evidence the monitoring system and evaluations will deliver to ascertain the intended effects.</p> <p>The description of the intervention logic was supplemented with more information about ongoing works to increase the amount and improve the quality of evidence from counterfactual impact evaluations and their synthesis.</p>

<p>(2) The report should explain better the relevance of the instrument to deal with evolving needs. It should use recent foresight analyses to establish what the forthcoming policy needs are in view of continued increased competitiveness pressures, digitisation and automation, and ageing populations. Based on analysis of programming, it should reflect on the results of relevance analysis to assess the prioritisation of resource allocation including distributing funds across the three policy areas.</p>	<p>Additional analysis on future relevance based on Foresight analysis and Draghi report included in chapter 4.3.</p>
<p>(3) The report should explain more clearly its methodological approach underpinning the current analysis of costs and benefits. It should clarify to what extent the figures presented are based on actual data or based on data extrapolated from the 2018 study on simplified cost options. The report should be clearer about the metric and who the savings are for. It should also better explain how those savings were brought about by the ESF+.</p>	<p>The part on efficiency in Section 4.1 was updated. Additional analysis on administrative costs based on the Interim report of the study “<i>Assessment of administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027</i>” were added which was not yet available at the time of writing the first version of the report.</p> <p>The report also clarifies that the saving estimates are obtained by incorporating the 2024 figures in the 2018 simulations model. The report also clarifies that the savings are for programme authorities.</p>
<p>(4) The report should reflect on the methods and data needs for the evaluation of unintended effects. It should also make a greater effort to identify and, where relevant, analyse unintended consequences of the ESF+ such as possible displacement of private funding, distortion of life-long training markets.</p>	<p>Section 2.1. includes considerations on possible unintended effects and possible methods and data needs to analyse them at a later stage when the implementation is more advanced.</p>
<p>(5) The conclusions should better reflect the limitations of the available evidence base (relying heavily on a limited set of stakeholders’ opinions) and take into account the strengthened intervention logic and relevance analysis. The report should be more specific about the lessons regarding methods and data needs, including strengthening impact evaluation of innovative solutions (developed in the EaSI strand as well as elsewhere) as a</p>	<p>The lessons learned section includes lessons on strengthening impact evaluations and improving the use of administrative data and data needs on unintended effects. Additional considerations on methodological limitations were added.</p>

<p>prerequisite for scaling up. It should be more specific about the use of administrative data to improve quality of monitoring and evaluation, and to reduce reporting costs. The lessons should also reflect on the data needs regarding unintended consequences.</p>	
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## ANNEX II. METHODOLOGY AND ANALYTICAL MODELS USED

### **Overall approach to the evaluation**

This evaluation is based on an external supporting study, study on administrative costs and analysis of the raw data of this study and other documents referenced in the SWD. The analysis of the supporting study was updated by DG EMPL based on transmission of data by end 2024 on expenditure, outputs and results. The extraction took place in May 2025. The different cut-off dates are summarized in the table below.

**Table 1**

Financial allocations data	Q1 2023
Financial data	Q4 2024
Monitoring data on achievements (outputs and results)	Q4 2024
Survey	Q2 2024
Interviews	Q1-Q2 2024
Uptake on FNLCs and SCOs	Q1-Q2 2024
Administrative cost data	Q1-Q2 2024

### **Supporting study**

DG EMPL relied on the work of external evaluators to (i) collect and analyse the relevant evidence (including consultation work); (ii) provide initial answers to all evaluation questions; and (iii) present evidence-based conclusions and lessons learnt. The study followed an approach based on mixed-method data collection approaches, combining qualitative and quantitative research methods. The overall methodological approach was guided by an Intervention Logic presented in [Annex VII](#) and an evaluation framework presented in [Annex III](#).

#### *Inception phase*

Following the kick-off meeting with the Commission, the study team conducted scoping research, including desk research and interviews with the Secretariat General, as well as DG EMPL Units G.1 and A.3, which are responsible for the coordination of the ESF+ shared and the EaSI strands, respectively. Based on this research, the study team refined the evaluation matrix, the intervention logic, the methodological approach as well as the research tools.

#### *Task 1 Desk Research*

The EU-level desk research included strategic documents such as the Common Provisions Regulation, the ESF and ESF+ regulations, the EaSI 2014-2020 Regulation, the impact assessment for the ESF+ regulation, the mid-term and *ex post* evaluations of EaSI, the

ESF+ Synthesis report, the European Court of Auditors' report on the rule of law in the EU and others. In total, the EU-level research included 49 sources. As part of the EU-level research, the study team also relied on data from SFC2014, SFC2021<sup>226</sup>, FINAP<sup>227</sup> and eGrants<sup>228</sup> systems, as well as on internal data provided by the European Social Fund Agency (ESFA) and data publicly available on the European Commission's website related to the Social Innovation Match (SIM) database.

The national-level desk research was conducted for each Member State using documents in the respective Member State's local language(s). This was facilitated by a team of national experts in each Member State. This research included 209 sources including, amongst others, Member States' Partnership Agreements, programmes, European Semester documents, and National Reform Programmes. After the National experts completed the research, the study team collated the individual reporting templates into a single Excel file for a consolidated appraisal. This analysis was combined with the analysis of EU-level documents, as well as quantitative data from SFC2014, SFC2021, FINAP, and other data sources.

Based on this structured approach to the desk research analysis, the study team provided preliminary answers to the evaluation questions of the study but also identified areas for further investigation and contradictory evidence. On the basis of the results of the desk research, the research team adjusted the tools for Task 2 (targeted surveys) and Task 3 (targeted interviews) and conducted additional desk research.

### *Task 2 Targeted surveys*

Two online surveys covering the shared management and the EaSI strands of ESF+ were administered. The main objective of the surveys was to collect information on the changes of the programming and implementation of ESF+, compared to the previous programming period.

The dissemination of the survey to the ESF+ managing authorities was made using the invitation management system of EUSurvey. A traceable link was sent to all ESF+ managing authorities in EU 27, using a distribution list shared by DG EMPL's G.5 Unit. This method enabled targeted follow-ups, avoiding repeated requests to participants who already responded. To increase the response rates, the European Commission, in liaison with the study team, mobilised its Geographical Units (Geodesks) which sent a reminder to their relevant ESF+ managing authorities. The survey was also translated in EL, ES, DE, FR, IT, PL and PT to encourage the participation of regional managing authorities in these countries.

The shared management survey was launched on 3 and 4 April 2024<sup>229</sup> and remained open until 24 May 2024, following a seven-working-day extension. The unit of measurement of the survey was an individual programme. In remote cases where there were more responses for one programme, the earlier response has been considered. A total of 91 responses were

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<sup>226</sup>SFC(2021) is the electronic data exchange system for all official exchanges of information between the Member State and the Commission concerning the CPR Funds management as set in Article 69(9) of the Regulation (EU) 2021/1060.

<sup>227</sup>FINAP is the online tool used by DG EMPL to program its financial activities under direct and indirect management modes.

<sup>228</sup>The eGrants system is the European Commission's corporate IT tool designed to manage the full life cycle of projects, including calls for proposals, evaluations, and grant agreements.

<sup>229</sup>In particular, the survey for EL, FR, DE, PL, and RO was launched on 4 April 2024 as additional time was needed to implement the translated versions of the survey in the respective languages and verify the contact details of the relevant stakeholders.

received from all EU Member States, apart from Slovakia<sup>230</sup>. [Figure 1](#) in Annex V shows the distribution of responses across managing authorities in EU 27.

For the EaSI strand, the survey was disseminated through several channels. The European Commission provided the study team with the contact details of TWG members, NCPs, EU-level networks, and project promoters. ESFA shared the survey link with the CoPs, the ALMA network, and the project promoters of the ALMA call for proposals (see [Box 1](#), Annex VII). The study team retrieved the contact details of the NCCs using publicly available information on the European Commission's website<sup>231</sup>.

The EaSI strand survey was launched on 15 April 2024 and it remained open until 31 May 2024, following a 12-working-day extension. To enhance participation rate, the study team monitored the response rate across different stakeholder groups, and sent targeted reminders. DG EMPL A.3, responsible for the coordination of the EaSI strand, also supported the study team, through sharing the survey link with stakeholders on the EaSI strand. The survey received a total of 74 responses from all EU countries apart from DE, FI, PL and SK and two responses from third countries participating in ESF+, one from Montenegro and one from Serbia. [Figure 2](#) in [Annex V](#) shows the distribution of responses across managing authorities in EU 27. [Figure 3](#) in [Annex V](#) shows the distribution of responses across different stakeholder groups that were consulted.

### *Task 3 Targeted interviews*

Following the requirements of the technical specifications of the study, the research team has conducted a total of 360 interviews involving over 500 individuals.

The first wave of interviews took place between 22 January 2024 and 8 March 2024. The main objective of this wave was to complement the results of the desk research and help the study team provide preliminary answers to all evaluation questions based on the five evaluation criteria. This wave prioritised interviews with key stakeholders on the policy-making front (ESF+ Committee Members, Ministries, Intermediate Bodies) involved in ESF+ design, management and coordination. These stakeholder groups were best placed to address the main enquiries around ESF+'s internal design, simplification, relevance, and interactions with other EU funds. Therefore, contacting them early in the study was crucial, to secure key inputs to answer the evaluation questions. As part of this first wave, a total of 134 interviews were conducted.

The second wave of interviews took place between 15 March 2024 and 15 June 2024. This wave complemented the evidence collected through the first wave of interviews and addressed its gaps. To this end, it incorporated the lessons learned from the first round of interviews in the form of revised interview guides, which simplified the language of the questions and refined the points of inquiry. As part of this second wave, a total of 226 interviews were conducted.

Considering the technical nature of the subject-matter, interviews followed a semi-structured approach, giving the flexibility to the interviewees to change the order and phrasing of the questions as well as omit or ask additional questions to follow-up on interviewees' views.

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<sup>230</sup>The reply from Slovakia was received after the deadline and was not taken into account.

<sup>231</sup><https://european-social-fund-plus.ec.europa.eu/en/competence-centres-social-innovation>

**Table 2 - Achieved number of interviews**

	EU level		National level	
	Shared	EaSI	Shared	EaSI
Achieved (% of target)	12 (100%)	29 (90%)	265 (95%)	54 (85%)

Source: Ecorys consortium, 2025

#### *Task 4 Case studies*

Three case studies have been conducted as part of the research. They covered the following topics:

- **Addressing social integration and material deprivation.** The main lines of enquiry were whether the level of support in the selected countries, under SO 4.12 (l) and 4.13 (m) was similar, or comparable, to the level under FEAD; what type of support was provided and how this compares to the period 2014-20; changes in programming and implementation; possible advantages and/or disadvantages of integrating FEAD into ESF+; whether there was stronger coherence and complementarity with other types of support under ESF+; which target groups were addressed within ESF+ and how they compare to FEAD;
- **Social innovation and experimentation.** The objective of this case study was to assess the capacity of the new arrangement of the ESF+ to promote partnerships between public authorities and a wide range of stakeholders (social partners, civil society, etc.), aiming at identifying, conceiving, transferring, experimenting, evaluating and upscaling innovative approaches to meet social needs at the Member State level in different policy fields;
- **Communication of EaSI strand activities.** The objective of this case study was to evaluate EaSI communication at all levels. This includes the EU level (communication by the European Commission and the European Social Fund Agency), national level (National Contact Points and National Competence Centres for Social Innovation), and local level (project promoters under the EaSI strand).

#### *Task 5 Focus groups*

As part of the study, two focus groups (FGs) took place, one for the direct/indirect management, on 9 July 2024, and one for the shared management, on 10 July 2024. The purpose of the FGs was to:

- Consolidate and validate the analysis undertaken in the study;
- Supplement findings with additional examples, measures, or good practices;
- Exchange ideas on lessons learned from ESF+ implementation to date, which could feed into the remainder of the current programming period, or ESF+ post-2027.

The FG for the EaSI strand gathered 41 participants<sup>232</sup>, while the FG for the shared management strand gathered 49 participants<sup>233</sup>. Microsoft Teams was used to run the FGs. Each FG was organised into two main sessions: the first session presented the study findings by evaluation question (as relevant for each stakeholder group); and the second

<sup>232</sup>This number includes the European Commission and the study team's members.

<sup>233</sup>This number includes the European Commission and the study team's members.

session focused on shared conclusions, learning points and policy implications for the future. Within the first session, discussions were held in breakout groups, whereas in the second session, discussions were held in plenary.

The breakout groups for the shared management strand included a mix of stakeholders on the policy side (Ministries, managing authorities, intermediate bodies, social partners) and on the implementation side (NGOs, beneficiaries). The decision not to have these groups separately was based on the small number of participating NGOs and beneficiaries.

Conversely, in the indirect management strand, policy-side stakeholders (EaSI Technical Working Group members, National Contact Points, National Competence Centres for Social Innovation) were grouped separately from implementation-side stakeholders (EU-level networks and project promoters under the EaSI strand).

### *Task 6 Conclusions*

Throughout the conclusion tasks, the findings were tested through a process of triangulation, to establish the extent to which the different strands of evidence support or refute each other. Analysis was clustered around management strands, specific programmes, Member States, as well as by stakeholder group, and common themes. The evidence gathered to answer the evaluation questions was then reviewed, to form balanced judgments in relation to the relevance, coherence, efficiency and effectiveness and European added value of the programming and implementation of ESF+ to date. As relevant, the findings and assessments were presented in relation to different programme strands and the programme as a whole.

The evidence was also used to revisit and test the intervention logic for the study. In particular, the study team used the evidence to confirm the logic chain of the programme and used this to formulate the key lessons, including challenges and potential improvements, which could be useful for improving ESF+ implementation in the second part of the current programming period and to inform the future shape of ESF+. The development of lessons learnt from the study were based on the triangulated findings of the study, including promising practices identified, but also drew strongly on the results of the focus groups (Task 4), which examined in more detail specific issues and potential recommendations with the relevant stakeholder groups.

### **Limitations and robustness of findings**

The main limitations encountered in the research included the following:

- **Low level of ESF+ implementation and limited evidence on impacts:** As foreseen in the technical specifications of the study, and discussed with the ISG during the inception phase, this was a key limitation for the study. Since implementation on the ground of ESF+, in particular the shared management strand, started later than foreseen, evidence on its effects was limited at the time of writing. Similarly, although calls for proposals under the EaSI strand have taken place since 2021, there was still limited evidence on impacts of funded activities for this strand. The study team has drawn on as much available quantitative and qualitative evidence on implementation and impacts as possible, however it is important to note this key limitation. As foreseen in the questions set out in the technical specifications for the study, the study thus principally explored whether and how the design of the fund and the changes in its design from the previous programming period were supporting synergies within the fund and with other funding programmes and policies, the increased relevance of the fund to needs on the ground and increased efficiencies and effectiveness in initial implementation;

- **Stakeholder fatigue:** due to the large number of evaluations that were being conducted on ESF at both national and EU level, as well as those conducted on FEAD, YEI and EaSI (which came under the ESF+ umbrella), the study team encountered a degree of stakeholder fatigue for the consultation activities of the study, in particular the targeted surveys (Task 2), interviews (Task 3) and focus groups (Task 5). Thanks to deploying a range of strategies (e.g. using the expert knowledge and contact networks of the contractor’s national experts, accreditation letter from the European Commission, repeated contacts to persuade stakeholders of the importance of the study, etc.), the study team was able to overcome this challenge to a large extent, but involved the deployment of significant resources to reach the right consultees within the study timeframe;
- **The technical nature of the evaluation questions:** National experts encountered difficulties in adapting interview questions in particular to ESF+ beneficiaries or organisations representing participants. This challenge arose because the nature of the evaluation questions was often too technical for these stakeholders (as noted above, focusing principally on the design, relevance and coherence of ESF+ rather than implementation to date). To mitigate this challenge, the research team assisted National experts in explaining technical questions in more understandable terms, and adapting the focus of the interviews to the specific knowledge and experience of interviewees;
- **The wide scope of ESF+:** the new architecture of ESF+ is very broad, encompassing two strands, and bringing together funds previously covered by other specific funds (i.e. FEAD, YEI, EaSI). It covers a very wide spectrum of thematic areas and stakeholders (at EU, national and local levels), as well as management mechanisms (shared, direct and indirect management). This posed a significant challenge for covering all relevant fields, stakeholders and management mechanisms in outreach to stakeholders, research tools, conducting research, analysis and reporting. In conjunction with the ISG, the study team has worked closely to develop tools and agree reporting structures, including grouping of evaluation questions, which cover all these dimensions in the most coherent and comprehensive manner;
- **The tight timeframe of the study:** given the wide scope of ESF+, the complexity of the evaluation questions and the challenges with stakeholder fatigue, the study timescale of a maximum of 12 months was very tight to cover all the research tasks and reach all relevant stakeholders. The study team nonetheless deployed the necessary resources to ensure that the research was completed on time and to the highest possible quality.

### **Analysis of administrative costs**

The analysis of costs builds on the study ‘Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027’ (forthcoming in 2025) and on the 2018 study ‘New assessment of ESIF administrative costs and burden’<sup>234</sup>.

*Administrative costs for programme authorities*

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<sup>234</sup>[New assessment of ESIF administrative costs and burden - Publications Office of the EU \(europa.eu\).](https://publications.europa.eu/en/publication-detail/-/publication/11111111-1111-1111-1111-111111111111)

Regarding administrative costs for programme authorities, the study ‘Assessment of the administrative costs and administrative burden in the management of the common provisions regulation funds 2021-2027’ collected data from two targeted surveys, one sent to programme authorities and another to coordination bodies. Both included quantitative and qualitative elements related to administrative tasks, practices, costs, and potential savings. To ensure representativeness, the surveys collected information from all Member States, funds, type of region and programme size. Follow-up interviews were used to validate the results.

Following this study’s categorisation, the assessment of costs presented by task area (i.e. broader categories) in [Annex IV](#). These entail the following activities:

- Preparation: elaboration of Partnership Agreements, preparation of programmes and programme amendments, setting up of management and control system, identification of programme authorities, ensuring and monitoring enabling conditions.
- General management: information, training and communication, establishing, running and guiding work of monitoring committee, ensuring a system for collecting, recording and storing data, setting up and using a system for electronic exchange of information with beneficiaries, ensuring respect for fundamental rights, equality between men and women and non-discrimination, drawing up the management declaration.
- Financial management: ensuring adequate separation of functions and systems, corrections of irregularities, effective and proportionate anti-fraud measures, drawing up and submitting payment application to commission, certification of expenditure entered in the accounts, accounting function, management of financial instruments.
- Operations: selection of operations and information to beneficiaries, management verifications for each application for reimbursement by beneficiaries, on-the-spot verifications, integrated territorial investment, community-led local development.
- Reporting, Monitoring, Evaluation: annual performance review, preparation and transmission of financial data to the EC, programme evaluations.
- Audit: preparation, submission and updating of audit strategy, system audits, ensuring adequate audit trail, audit of operations, audit of accounts, preparation and submission of annual audit opinion and control report.

Whenever possible, estimates for ESF+ and multi-fund programmes were used. The ESF+ portion of the multi-fund programmes could not be estimated separately, and it was assumed to be 18% of the administrative costs of the multi-fund programmes corresponding to the ESF+ share of the allocations in multi-fund programmes. Estimates of the administrative costs for programme authorities of the different funds are based on the following sample sizes: all CPR funds (N= 275), ESF+ (39), Multi-fund (N=72, out of which 57 programmes also included ESF+). Note that sample size refers to the number of programmes and not individual responses.

For the remaining programmes with no data, the missing values were imputed using the k-nearest neighbour method (see the study for more details on the imputation method). The total sample size (programmes where data was collected and imputed) is the following: CPR funds (N=483), ESF+ (N=82), Multi-fund (N=110). The total cost calculations and total costs by task and by fund, based on the raw data, were made by DG REGIO.

Total monetised costs were estimated until December 2024, i.e. the cut-off point for data collection of this mid-term evaluation. The forthcoming 2025 study collected data on the share of costs that are incurred each year. It is possible to estimate how much has been incurred until the end of 2024 using this information. These calculations, based on the raw data, were made by DG REGIO. Such yearly breakdowns could not be estimated at the task group level. Task group cost figures are therefore presented as estimates until the end of the period.

#### *Cost savings for programme authorities*

The aggregate monetised estimate of burden reduction for programme authorities builds on a comparison of the results with the previous 2018 study “New assessment of ESIF administrative costs and burden” relating to the 2014-20 period. However, some key limitations make the comparison challenging and therefore the overall results should be treated with caution. The main limitations to the comparability are the following:

- The list of tasks has been refined compared to the previous study and therefore cannot be fully compared.
- The amount of data for costs on the task level is substantially lower compared to other types of data.
- The data was collected during a period where many programmes had their operations not yet fully running, due to the implementation delay of many programmes.
- During interviews, programme authorities repeatedly reported difficulties in comparing the tasks to the previous funding period, as the structure of tasks developed for this study was difficult for programme authorities to apply to the reality of managing the programmes.

Because of the above, this evaluation only presents one aggregate monetised figure for the ESF+ programmes and the percentage change of the total average costs for the ESF+. The total monetized figure for cost savings for the ESF+ programmes was estimated by using a combination of raw data (total costs for programme authorities during the entire period for the ESF+ programmes: EUR 1,752 m) and estimated cost reduction in total average costs in percentages (-29%). Data for multi-fund programmes were not available. The comparison at the fund level seems to be more plausible than the comparison between tasks (i.e. at a more granular level), which is therefore not monetised for the purposes of this evaluation.

Regarding simplification for programme authorities, measures were assessed for their potential to reduce costs. The scoring is determined based on the percentage of respondents who believe the measure result in cost savings. The levels of scoring are as follows:

- 1: less than 5% of respondents believe the measure reduces costs;
- 2: more than 5% of respondents anticipate cost savings;
- 3: more than 30% expect cost reductions; and
- 4: more than 50% of respondents predict significant cost savings.

Measures are also assessed for their likelihood of causing cost increases. The scoring reflects how many respondents expect higher costs due to the implementation of these measures:

- 1: Less than 5% expect significant or moderate cost increases;

- 2: More than 5% expect such increases;
- 3: More than 30% expect significant or moderate cost increases; and
- 4: More than 50% expect cost increases.

Finally, a score is given about the Net cost reduction potential (Cost reduction minus cost increase). This score indicates the overall cost-effectiveness of each measure, calculated by subtracting the cost increase potential from the cost reduction potential:

- 0: NO COST REDUCTION POTENTIAL – If the net score is less than 1, meaning there is little to no overall cost reduction potential;
- 1: MODERATE – A net score of 1
- 2: SIGNIFICANT – A net score of 2 or above

The table in [Annex IV](#) only presents the measures that have received an overall net score above 0. The scores are based on respondents for ESF+ and multi-fund programmes.

#### *Administrative costs for beneficiaries*

Administrative costs are also incurred by beneficiaries. These costs relate to all activities undertaken by beneficiaries and final recipients through their application and project lifecycle related to their use of the ESF+. Estimates for the burden on beneficiaries are based on 197 beneficiary responses and 4 final recipients of financial instruments from 72 different programmes that have participated in the survey. Of these, respondents for the evaluated funds are as follows: ESF+ (N=22) and Multifund (N=97), but the number of respondents differs by task (see [Annex IV](#) on the number of respondents per question). The response rates show uneven distribution across funds and Member States. This low response rate may introduce bias, as the perspectives captured may not fully reflect the broader reality of administrative burden. To mitigate this bias to the extent possible, the administrative cost (note: the underlying study uses the term ‘burden’ for beneficiaries) results are presented for all CPR funds relating to all 201 responses and presented in qualitative terms.

#### *Cost savings for beneficiaries*

Similarly, the comparison of administrative burden on beneficiaries is limited by several issues of comparability. As for the programme authorities, it is built on the comparison with the 2018 study, which highlights several challenges to direct comparability due to changes in scope, task definition, measurement and data collection. Given comparability issues and the relatively smaller sample size, the SWD does not include monetised estimates, and administrative burden is assessed only qualitatively. The comparison of administrative cost for beneficiaries with the previous programming period was done only qualitatively.

#### *Cost savings due to SCOs*

To estimate the monetary value of the burden reduction due to increased use of SCOs for the ESF+, three sources of were used: the 2018 study ‘New assessment of ESIF administrative costs and burden’; actual data on the use SCOs by 2024; inflation data (Harmonized Index of consumer prices: Eurostat). The 2018 study was an ex-ante assessment on the burden reduction potential depending on the use of SCOs. The burden reduction by end 2024 was calculated by applying the 2018 ex-ante simulation model and incorporating the current figures on the use of SCOs assessed in 2024 prices.

**ANNEX III. EVALUATION MATRIX AND DETAILS ON ANSWERS TO THE EVALUATION QUESTIONS (BY CRITERION)**

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
To what extent was the intervention successful and why? (Effectiveness, efficiency, coherence)					
1	All	How is the articulation between direct, indirect and shared management delivering on funds' objectives?	<p>Outputs and results over the implementation period are in line with expectations and targets</p> <p>Based on the current level of implementation, the fund is projected to meet its targets</p> <p>The articulation of direct, indirect and shared management strands is having a positive impact on the achievement of objectives of the funds compared to the previous programming period</p> <p>Extent of integration in actual implementation of the ESF+</p>	<p>Fund performances against specific indicators selected as Point of comparisons</p> <p>Examples where the articulation of the strands has contributed to meeting objectives</p> <p>Perceived contribution of this articulation to achieving funds' objectives (by fund) by MAs and main ESF+ stakeholders</p> <p>Integration of timing and expected results of the different strands</p>	<p>SFC2021 data (Task 1)</p> <p>FINAP database (Task 1)</p> <p>eGrants database (Task 1)</p> <p>ESF+ monitoring data (planned resources by strand, priority, and Specific Objective) including data on results (Task 1)</p> <p>Analysis of ESF+ Synthesis report (Task 1)</p> <p>Analysis of EaSI AWP and Monitoring data for the period 2021-2023 (Task 1)</p> <p>Interviews with all EU and national stakeholders (task 3)</p> <p>Surveys of EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Case studies (Task 5)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
2	SM	<p>How useful are Partnership Agreements and programmes in the 2021-2027 programming period?</p> <p>In what ways, at which levels and why?</p>	<p>Partnership Agreements (PAs) have played a key role in providing a strategic orientation for the definition of the objectives, allocations of funding and actions for ESF+ programmes at national and regional level</p> <p>Partnership Agreements (PAs) continue to play a key role in guiding programming or implementation of the ESF+ at national and regional level</p> <p>Programming components included in the PAs are better placed in the agreements than in the programmes or other strategic documents</p>	<p>Evidence of correspondence/influence of PAs on objectives, funding allocations and actions in ESF+ OPs (analysis of texts)</p> <p>Evidence of effectiveness of PAs to ensure coherence of the ESF+ programming and implementation</p> <p>Assessments of usefulness of the different components of the strategic orientation by the MAs and other actors (pluriannual programming, resources allocated to specific social aims, involvement of stakeholders, possibility of reprogramming, EU constraints on financial allocation, constraints on the timing of the expenditure, monitoring, evaluation, etc.)</p>	<p>Adopted OPs and Partnership Agreements (Task 1)</p> <p>Member State evaluations and studies, including of other EU funds (Task 1)</p> <p>SFC2021 (Task 1)</p> <p>ESF+ Synthesis report (Task 1)</p> <p>National legal acts regulating the ESF+ implementation (Task 1)</p> <p>Interviews with ESF+ shared management stakeholders at EU and national level (Task 2)</p> <p>Survey of ESF+ managing authorities (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p> <p>Case studies (Task 5)</p>
3	SM	<p>How could the process leading to programme adoption be streamlined?</p> <p>In what ways and why?</p>	<p>Identification of process elements leading to bottlenecks or streamlining</p> <p>Existence of demand for simplification and main needs and suggestions for simplifications</p>	<p>Evidence on the duration of processes in the preparation of the PA and programmes, including the main examples of prolonged processes (and why) and of efficient processes (and why)</p> <p>Analytical evidence from stakeholders' consultation on key elements of PAs and programmes which (a) helped to streamline and (b)</p>	<p>ESF+ Synthesis report (Task 1)</p> <p>National legal acts regulating ESF+ (Task 1)</p> <p>Surveys with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at EU and national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				<p>hindered processes leading to the adoption of programmes</p> <p>Stakeholders consulted reported examples of how programme adoption could be streamlined</p> <p>Evidence from desk research on how programme adoption could be streamlined</p>	
4	SM	<p>What (internal and external) circumstances hindered/ facilitated the preparation of programmes?</p> <p>In what ways and why?</p>	Existence, extent and nature of key internal and external circumstances (a) hindering and (b) facilitating programme preparation	<p>Analytical evidence from stakeholders' consultation on key internal factors which (a) hindered and (b) facilitated the preparation of programmes</p> <p>Analytical evidence on key external factors which (a) hindered and (b) facilitated the preparation of programmes</p> <p>Views of key stakeholders and evidence from desk research on circumstances (a) hindering and (b) facilitating programme preparation</p>	<p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at EU and national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>
5	SM	Did the merger of former ESF, YEI and FEAD facilitate or hinder programming and implementation to date?	Extent and nature of advantages/benefits on (a) programming and (b) implementation introduced by merging these funds to date	Evidence of new simplifications (e.g. smaller number of programmes, more similar implementation procedures, better possibility of coordinating the funds, etc.) and their effective implementation	<p>SFC2014 and SFC2021 (Task 1)</p> <p>Secondary sources: Impact assessment accompanying the Proposal for a Regulation of the European Parliament and the Council on the European Social Fund Plus (ESF+) (Task 1)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
		In what ways and why?	<p>Extent of disadvantages/costs on (a) programming and (b) implementation introduced by merging these funds to date</p> <p>Extent outputs and results over the implementation period are comparable with the corresponding outputs and results at the same point in time under the previous programming period</p> <p>Extent to which Partnership Agreements and programmes required more time than under the previous programming period to be adopted</p>	<p>Evidence of additional complexities or hindrances to programming and implementation of ESF+ to date linked to the merging of these funds (e.g. administrative delays, complexity of procedures, etc.)</p> <p>Changes occurred (if any) in the national institutional/ administrative arrangements to manage merged funds</p>	<p>Ex-post evaluation of the 2014-2020 FEAD conducted by Ecorys (Task 1)</p> <p>Ex-post evaluation of EaSI (Task 1)</p> <p>National legal acts regulating ESF+ (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p> <p>Case studies (Task 5)</p>
6	SM	What can be learned from other EU funds?	<p>Extent and nature of lessons which have been learned from other EU funds to date</p> <p>Identification of other lessons which can be learned from other EU funds</p>	<p>Relevant lessons from the programming and implementation of other EU funds (e.g. ERDF, CF, JTF) identified in evaluations of these funds</p> <p>Extent to which key ESF+ stakeholders reports to have adopted good practices from the programming and implementation of other EU funds</p> <p>Examples of good practices transferred to ESF+</p>	<p>Review of mid-term and/or ex-post evaluations of other EU Funds (Task 1)</p> <p>Interviews with ESF+ shared management stakeholders at EU and national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
7	SM	<p>Did the enabling conditions result in national regulatory and policy frameworks that are more conducive to effective investments in line with EU policies in the shared management strand?</p> <p>If so, how and why? What examples exist?</p>	<p>Extent of improvements in the national regulatory and policy framework (more detailed strategies, clearer instruments to use, easier investments, etc.)</p>	<p>National policy and regulatory systems embodying enabling conditions or using them to produce improvements in planning, managing and assessing labour and social policies</p> <p>Cases where the strategic policy framework was significantly changed to satisfy ECs conditions and accelerate and better target investments</p>	<p>Structured data and transmissions available to date (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>
8	SM	<p>Are horizontal enabling conditions conducive to preventing irregularities in the implementation of the Fund?</p> <p>In what ways?</p> <p>What examples exist?</p>	<p>Degree to which horizontal enabling conditions have prevented (or are likely to prevent) irregularities in the implementation of the Fund to date</p>	<p>Changes implemented in management and control mechanisms to ensure compliance with the horizontal enabling conditions</p> <p>Number of reported irregularities VS total number of projects implemented (Error rate)</p> <p>Decrease in the number of irregularities per operation (or spent EUR mn) in comparison to the past (where available)</p> <p>Extent to which key stakeholders agree that horizontal enabling conditions contributed to prevent irregularities</p>	<p>SFC2021 data on updated expenditure (Task 1)</p> <p>ESF+ Synthesis report (Task 1)</p> <p>Secondary sources: Audit (including ECA) reports (Task 1)</p> <p>Surveys with ESF+ Managing/Audit Authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
9	SM	<p>Are thematic enabling conditions conducive to foster the effectiveness of investments?</p> <p>In what ways?</p> <p>What examples exist?</p>	Degree to which thematic enabling conditions have fostered the development of national policy frameworks and context more conducive to the successful achievement of the relevant SOs	<p>Evidence on how fulfilling the thematic enabling conditions ensured the existence of a national context and policy frameworks more conducive to the successful achievement of the relevant SOs</p> <p>Evidence of (positive or negative) effects of the thematic enabling conditions on implementation (definition of the operations, identification of the target population, etc.)</p> <p>Extent to which key stakeholders agree that thematic enabling conditions have fostered the development of national policy frameworks and context more conducive (or are likely to foster) to the successful achievement of the relevant SOs the effectiveness of</p>	<p>ESF+ Synthesis report (Task 1)</p> <p>Secondary sources: Audit reports (Task 1)</p> <p>Secondary sources: A Union of Equality: EU Roma strategic framework for equality, inclusion and participation<sup>235</sup>, Investing in education 2023<sup>236</sup> and others (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>
10	SM	<p>Are enabling conditions leading to structural investments?</p> <p>In what ways?</p> <p>What examples exist?</p>	Degree to which enabling conditions have led (or are likely to lead) to structural investments	<p>Increase or acceleration of national and ESF+ structural investments</p> <p>Increased volume and/or speed of structural investments in ESF+ programmes in comparison to the past</p>	<p>SFC 2021 data on updated expenditure (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p>

<sup>235</sup>See [https://commission.europa.eu/publications/new-eu-roma-strategic-framework-equality-inclusion-and-participation-full-package\\_en](https://commission.europa.eu/publications/new-eu-roma-strategic-framework-equality-inclusion-and-participation-full-package_en).

<sup>236</sup>See <https://education.ec.europa.eu/sites/default/files/2023-05/investing%20in%20education%202023-NC0423415ENN.pdf>.

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				<p>Examples where enabling conditions can be linked to increased structural investments</p> <p>Views of key stakeholders on the degree to which enabling conditions are leading to structural investments</p>	<p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>
11	I/DM	<p>How effective and efficient was the integration of the EaSI strand activities in the ESF+ in terms of programming and processes?</p> <p>In what ways and why?</p>	<p>The integration of the EaSI strand activities in the ESF+ brought actual and potential improvements in terms of better planned and more customised interventions</p>	<p>Improvements (e.g., innovation, targeting, scope, etc.) in the effectiveness of programming and processes of EaSI strand activities in ESF+ in comparison to the previous programming period</p> <p>Enabling factors and obstacles which affect(ed) the transfer of EaSI experience in ESF+ programming, funding or participation</p>	<p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>EaSI Portfolio of projects (type, objectives, resources, etc.) (Task 1)</p> <p>EaSI evaluations (Task 1)</p> <p>Structured data transmissions available to date (Task 1)</p> <p>SFC2021 (Task 1)</p> <p>Survey of EaSI stakeholders (EaSI Managers and Technical Working Group Members) (Task 2)</p>
12	I/DM	<p>Is there any new pattern emerging from this integration (notably in terms of programming, funding or participation)?</p> <p>What are the changes and to what can they be attributed?</p>	<p>Observed changes and new trends compared to the past implementation of EaSI e.g. new methods of programming, funding, targeting, participation of different beneficiaries, new partnerships, different types of calls for proposal/funded operations</p>	<p>New patterns in programming</p> <p>New patterns in funding mechanisms</p> <p>New ways of working with key stakeholders</p> <p>Increased or reduced participation</p> <p>New target groups and beneficiaries, new partnerships</p> <p>Increased or reduced numbers of calls for proposals</p>	<p>Interviews with EaSI stakeholders at EU and national level (Task 3)</p> <p>Online focus group for EaSI (Task 4)</p> <p>Case studies (Task 5)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				Reasons for new patterns	
13	I/DM	<p>What are to date the strand's progress/ achievements with respect to identifying and involving relevant stakeholders in the strand's governance and implementation?</p> <p>What kind of specific insight and new dynamic has been gained?</p>	<p>Degree of involvement of the stakeholders (number, type, representativity of key groups, capacity of dialogue, influence in the decision-making processes)</p>	<p>Stakeholders (type, number, nationality, etc.) involved in the programming and the implementation of the direct and indirect management strand</p> <p>Stakeholders consulted reported that overall governance and implementation involved all relevant stakeholders without evident gaps/exclusions</p>	<p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>First stakeholders' survey covering the 2021-2023 period (Task 1)</p> <p>Survey of EaSI stakeholders (Task 2)</p> <p>Interviews with EaSI stakeholders at EU and national level esp. with EaSI Managers and Technical Working Group Members (Task 3)</p> <p>Online focus group for EaSI (Task 4)</p> <p>Case studies (Task 5)</p>
14	I/DM	<p>How is transnational cooperation under indirect management contributing to the scaling-up of innovative ideas and enhanced cooperation between managing authorities of different Member States?</p>	<p>Extent of existence (or absence) of examples of scaling up innovative ideas deriving from indirect management transnational cooperation</p> <p>Extent (or absence) of evidence of enhanced cooperation between managing authorities fostered by indirect management transnational cooperation</p>	<p>Examples of innovative ideas which have been scaled up thanks to indirect management transnational cooperation</p> <p>Mechanisms (networks, events, websites, etc.) to support scaling up of innovative ideas via indirect management transnational cooperation</p> <p>Examples and identification of types of enhanced cooperation between MAs fostered through transnational cooperation (e.g. direct collaboration</p>	<p>Surveys of EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Interviews with all stakeholders at EU and national level (Task 3)</p> <p>Online focus groups (Task 4)</p> <p>Case studies (Task 5)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				between MAs, national coordination body facilitating, use of TA, methods for transnational engagements in public procurement or involvement of partners)	
15	SM	<p>Which aspects generate the most added value towards ensuring a strong strategic orientation and which aspects could be simplified or abandoned?</p> <p>In what ways and why?</p>	Main advantages/benefits and disadvantages/costs/inefficiencies of different aspects of the PA and programmes in relation to strategic orientation and implementation mechanisms	<p>Evidence of strategic, operational advantages of having a single strategic framework and pluriannual programmes</p> <p>Evidence of main disadvantages/costs/inefficiencies in programming and implementing PA and programmes in relation to national plans</p>	<p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>
16	SM	<p>What are the trade-offs between partnership, territoriality and subsidiarity (relevance and beneficiary engagement - bottom-up approach) on the one hand, and a more centralised architecture (more rapid response through higher-level political engagement – top-down approach) on the other?</p>	Degree of existence and nature of the trade-offs between the bottom-up and top-down approaches	<p>Identification and analysis of examples of trade-offs between the bottom-up and top-down approaches</p> <p>Testing of some possible trade-offs:</p> <p>Timing of the decision-making processes in centralized and less centralized contexts</p> <p>Time between first submission and adoption of programmes in centralised and less centralised contexts (e.g. if data is available, possible comparison with centralised programming based funds, e.g. RRF)</p>	<p>Eurostat (government expenditure by function data) (Task 1)</p> <p>Audit reports (Task 1)</p> <p>Literature review on centralisation vs decentralisation debate on EU Member-States (Task 1)</p> <p>Interviews with ESF+ shared management stakeholders at EU and national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				<p>More accurate place-based approaches vs. top-down generic approaches</p> <p>Complexity of the ESF+ model (multiannual programming, beneficiary engagement, subsidiarity, partnership, territoriality, etc.) vs. positive effects on quality and management of the national plans</p>	
17	SM	<p>To what extent are the different modalities - Financing Not Linked to Costs (FNLCs) – Simplified Cost Options (SCOs) – grants (payments linked to costs) - used?</p> <p>What are the reasons for having chosen specific modalities?</p> <p>Are FNLCs more conducive to structural investment than other implementation modalities?</p>	<p>Level of usage of the different financial modalities</p> <p>Importance attributed to the different financial modalities by implementing organisations/MAs and beneficiaries</p>	<p>Proportion of resources managed by the different financial modalities across different Member States (if known)</p> <p>Changes in these proportions in comparison to the past</p> <p>Perceived advantages which have influenced the choice of using different financial options</p>	<p>SFC2021 data on expenditure (Task 1)</p> <p>Secondary sources: Adopted OPs and Partnership Agreements for programmes that included SCOs (Task 1)</p> <p>Secondary sources: National documents related to implementation (Task 1)</p> <p>Secondary sources: Reports by the Community of Practice on SCOs<sup>237</sup> (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p>

<sup>237</sup>See <https://ec.europa.eu/european-social-fund-plus/en/transnational-cooperation-platform/community-practice-results-based-management>.

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
18	SM	To what extent do they improve operational processes and implementation: what are the advantages and disadvantages of each?	<p>Extent to which different financial modalities improve operational processes</p> <p>Extent to which different financial modalities improve implementation</p> <p>Degree of balance between advantages and disadvantages in different contexts</p>	<p>Advantages and disadvantages of each financial modality on operational processes e.g.:</p> <p>Duration of the management processes (controls, payment, etc.)</p> <p>Administrative costs of the management processes</p> <p>Administrative burdens of the management processes</p> <p>Integration with national procedures</p> <p>Advantages and disadvantages of each financial modality on implementation e.g.:</p> <p>Encouraging smaller organisations to lead ESF operations</p> <p>Facilitating payment of beneficiaries</p> <p>Facilitating compilation of expenditure (for beneficiaries and managing authorities)</p>	Online focus group for SO(a) to SO(l) and online focus group for SO(m)
19	SM	What are the context factors that facilitate or impede the uptake and	Degree of existence and nature of the context factors which facilitate the uptake and operational efficiency of	Evidence and nature of context factors which facilitate the uptake and operational efficiency of each of these modalities (e.g. flexibility of national	

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
		<p>operational efficiency of each of these modalities?</p> <p>Why?</p>	<p>each of these modalities in different contexts</p> <p>Degree of existence and nature of the context factors which impede the uptake and operational efficiency of each of these modalities in different contexts</p>	<p>rules, administrative capacity (complexity, skills, personnel, etc.), positive reception from beneficiaries, clear guidelines)</p> <p>Evidence and nature of context factors which impede the uptake and operational efficiency of each of these modalities (e.g. gold-plating, rigidity of national rules and controls, administrative capacity (complexity, skills, personnel, etc.), resistance among beneficiaries, absence of guidelines)</p>	
20	I/DM	<p>How efficient was the integration of the EaSI strand activities in the ESF+ in terms of programming and processes?</p> <p>In what ways and why?</p>	<p>The integration of the EaSI strand activities in the ESF+ brought actual and potential improvements in terms of timing and administrative costs</p>	<p>Improvements in the efficiency of programming and processes of EaSI strand activities in ESF+ in comparison to the previous programming period (e.g. economies of scale, joint procedures, streamlined management and coordination, etc.)</p> <p>Speed and ease of the integration of EaSI activities in ESF+</p> <p>Enabling factors and obstacles which affect(ed) the transfer of EaSI experience in ESF+ programming, funding or participation</p>	<p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>EaSI Portfolio of projects (type, objectives, resources, etc.) (Task 1)</p> <p>EaSI evaluations (Task 1)</p> <p>Structured data transmissions available to date (Task 1)</p> <p>SFC2021 (Task 1)</p> <p>Survey of EaSI stakeholders (EaSI Managers and Technical Working Group Members) (Task 2)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
21	I/DM	<p>Is there any new pattern emerging (notably in terms of programming, funding or participation)?</p> <p>What are the changes and to what can they be attributed?</p>	<p>Observed changes and new trends compared to the past implementation of EaSI e.g. new methods of programming, funding, targeting, participation of different beneficiaries, new partnerships, different types of calls for proposal/funded operations</p>	<p>New patterns in programming</p> <p>New patterns in funding mechanisms</p> <p>New ways of working with key stakeholders</p> <p>Increased or reduced participation</p> <p>New target groups and beneficiaries, new partnerships</p> <p>Increased or reduced numbers of calls for proposals</p> <p>Reasons for new patterns</p>	<p>Interviews with EaSI stakeholders at EU and national level (Task 3)</p> <p>Online focus group for EaSI (Task 4)</p> <p>Case studies (Task 5)</p>
22	I/DM	<p>What are to date the strand's progress/achievements (in terms of governance and implementation) with respect to simplification of administrative processes (application requirements, selection procedures, implementation and reporting obligation) and of the monitoring system?</p>	<p>Degree of existence of significant progress/achievements with respect to simplification of administrative processes and the monitoring system</p> <p>Extent of improvement in the performance of the monitoring system (timeliness, completeness, usefulness)</p>	<p>Degree to which simplifications have been introduced in line with planned timings</p> <p>Simplifications introduced in the implementation of administrative processes of the strand (selection procedures, financial management, monitoring, etc.) and evidence of impact of changes</p> <p>Simplifications introduced in the monitoring system of the strand (selection procedures, financial</p>	<p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>EaSI portfolio of projects (Task 1)</p> <p>First stakeholders' survey covering the 2021-2023 period (Task 1)</p> <p>Secondary sources: Study on pathways to enhance the use of programme-specific indicators in the ESF and ESF+<sup>238</sup></p> <p>Secondary sources: reports of the European Courts of Auditors (Task 1)</p>

<sup>238</sup>See <https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8466&furtherPubs=yes>.

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
		Where has the least progress been achieved and why?		management, monitoring, etc.) and evidence of impact of changes	Survey of EaSI stakeholders (Task 2) Interviews with EaSI stakeholders at EU and national level esp. EaSI Managers and Technical Working Group Members (Task 3)
23	I/DM	Are there unintended effects?  If so, which, for whom and why?	Existence and nature of the unintended effects	Evidence and examples of unintended effects (e.g. due to simplification, trade-offs, increased burden, etc.)  Identification of main unintended effects, who they affect, and the reasons	Online focus group for EaSI (Task 4)  Case studies (Task 5)
24	I/DM	Are there (other?) areas where simplification could be pursued further?	Ongoing existence of bottlenecks and burdensome activities which could be removed/simplified	Evidence and examples of inefficiencies and bottlenecks in implementation  Views of stakeholders and current debate on possible additional simplifications, their pros and cons and available evidence	
25	All	Are there more synergies between the shared management and the EaSI strands than in the previous period and where/how do they materialise?	The new fund configuration enabled the creation of more synergies between EaSI priorities and the priorities of the shared management strand than under the previous programming period	Extent to which shared management strand programmes allocate financing to priorities complementary with the EaSI strand	SFC2021 (Task 1)  Cohesion open data platform (Task 1)
			The dialogue between decision-making processes of EaSI and the shared management strand is improved and more coordinated	Functioning of the EaSI technical working group in comparison to the past and improvements introduced in the decision-making processes	EaSI Annual work programmes (AWPs) (Task 1)  ESF+ programmes (Task 1)

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				<p>Types of integration between EaSI and shared management strand (EaSI as experimental fields for the shared management strand: policy planning and design, policy instruments to be used, involvement of the stakeholders, public and private partnerships, governance of policy models, implementation mechanisms, monitoring and evaluation)</p> <p>Evidence of improvement in the dialogue between decision-making processes of EaSI and the shared management strand</p>	<p>First stakeholders' survey covering the 2021-2023 period (Task 1)</p> <p>Minutes of the EaSI working group (Task 1)</p> <p>Previous EaSI evaluations (Task 1)</p> <p>Secondary sources: the ESF and community-led local development: lessons for the future<sup>239</sup> (Task 1)</p> <p>Secondary sources: Impact assessment accompanying a proposal for a regulation of the European Parliament and the Council on the European Social Fund Plus (ESF+) (Task 1)</p> <p>Survey of EaSI stakeholders (Task 2)</p> <p>Interviews with EaSI stakeholders at EU and national level (Task 3)</p>
26	All	In particular, are the respective ESF+ strands more conducive to upscaling and transfer of social innovations?	Extent of increased attention paid to innovation and experimentation in ESF+ programming and initial implementation	<p>Resources and plans dedicated to innovation and upscaling innovation in the ESF+ programmes in comparison to the past</p> <p>Extent to which ESF+ managing authorities are aware of the outputs of the EaSI programme</p> <p>Extent to which EaSI beneficiaries feel the new fund configuration</p>	<p>Data from SFC2021 (Task 1)</p> <p>Analysis of ESF+ Partnership Agreements and programmes (Task 1)</p> <p>Analysis of Member State evaluations and studies (Task 1)</p>

<sup>239</sup>See [https://ec.europa.eu/european-social-fund-plus/system/files/2022-02/KE0921329ENN.en\\_.pdf](https://ec.europa.eu/european-social-fund-plus/system/files/2022-02/KE0921329ENN.en_.pdf).

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				unlocked a greater potential for scaling up of their activities	
27	All	What are the facilitating and impeding factors to improve synergies identified to date?	Degree of success and difficulties encountered in promoting synergies between the two strands in different contexts	<p>Examples of success and difficulties in improving synergies with the examination of key factors such as:</p> <p>Innovation capacity in the administration (skills, priorities, measures dedicated, etc.)</p> <p>Strategic and implementation factors which facilitate synergies (e.g. better communication and information sharing, increased coherence and coordination at programming phase, etc.)</p>	<p>EaSI monitoring reports (Task 1)</p> <p>First stakeholders' survey covering the 2021-2023 period (Task 1)</p> <p>Surveys of EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Interviews with all stakeholders at EU and national level (Task 3)</p> <p>Case study on social experimentation / scaling up (Task 5)</p>
28	All	Is there learning among different funds' stakeholders that facilitate social innovation?	<p>The new fund configuration facilitate learning between learners (events, websites, etc.) exist</p> <p>Key stakeholders are more widely participating in exchanges and dissemination</p>	<p>Establishment/use of mechanisms to promote cross-fertilisation of ideas across different funds</p> <p>Involvement of MAs or key ESF+ stakeholders in EaSI projects (types of stakeholders, methods of engagement, real commitment)</p>	Implementation of the partnership principle and multi-level governance in 2014-2020 ESI Funds <sup>240</sup> (Task 1)

<sup>240</sup> See [https://ec.europa.eu/regional\\_policy/sources/policy/how/studies\\_integration/impl\\_partner\\_report\\_en.pdf](https://ec.europa.eu/regional_policy/sources/policy/how/studies_integration/impl_partner_report_en.pdf).

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				Involvement of stakeholders in dissemination of results and decision-making mechanisms	
29	All	How coherent is the ESF+'s programming with other EU funding instruments active in human capital investment (e.g. RRF, ERDF, JTF, EGF, Invest EU, Erasmus +, Horizon Europe, EU4Health, AMIF, EMFAF) and CAP 2023-2027 funds)?	ESF+ programming is coherent and synergic with objectives and actions in the legal texts with other EU funding instruments  Extent of financial contribution to common objectives	Evidence of common or complementary objectives and actions in different funding instruments  Allocation of the different EU funding instruments to the human capital investment by country, objective, type of intervention	SFC2021 and Cohesion Open Data Platform data (planned resources by ESF+ and other Funds by 'Human Capital Investments' priority, Specific Objective, and country) (Task 1)  Analysis of ESF+ Synthesis report (Task 1)  Analysis of Member State evaluations and studies (Task 1)
			Extent of existence of potential and actual trade-off between human capital investments of the different EU instruments	Attention paid to minimise potential trade-offs (e.g. funding of investments for technology saving employment, risks for increasing inequalities, capacity to adapt employees made redundant by decarbonisation or digitalisation, etc.)	Analysis of legal texts underpinning EU funding instruments in human capital investment (Task 1)
	All	How far is the synergy ensured (e.g. feedback and cross-fertilization mechanisms)?	Mechanisms exists, are used and are effective to ensure feedback, cross-fertilization and, overall, synergies	Identification of the key policy stages (programming, implementation, monitoring and evaluation) where synergies are pursued and related coordination methods  Actors involved and methods used to provide feedback and produce cross-fertilization between funds	National documents related to implementation of ESF+ (Task 1)  Interviews with EU-level stakeholders coordinating the Funds (Task 3)  Survey of ESF+ managing authorities (Task 2)  Online focus groups (Task 4)

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
30	All	How coherent is the ESF+ with other EU funding instruments active in supporting the digital and green transition?	<p>ESF+ objectives and actions are complementary and synergic with other EU funding instruments active in supporting the digital and green transition (e.g. RRF, JTF, Invest EU, Horizon Europe, EU4Health)</p> <p>Level and types of financial integration (complementarity, additionality, etc.) with other EU funding instruments active in supporting the digital and green transition</p> <p>Level and types of strategic integration with other EU funding instruments active in supporting the digital and green transition</p>	<p>Allocation of funds in the different instruments and ESF+ on digital and green transition</p> <p>Evidence of common or complementary objectives and actions in different funding instruments active in supporting the digital and green transition</p> <p>Types of operations funded by the different policy instruments and possible integration between investments and social policies (e.g. skills updating in public and private sectors, specific services for mobility and support digital and green sectors, etc.)</p>	<p>SFC2021 and Cohesion Open Data Platform data (planned resources by ESF+ and other EU Funds by digital and green transition priority, SO, and country) (Task 1)</p> <p>Member States evaluations and studies (Task 1)</p> <p>Structured data transmissions available to date (Task 1)</p> <p>Review of programming statements of ESF+ and other Funds supporting the digital and green transition (e.g. RRF, JTF, Invest EU, Horizon Europe, EU4Health, ERDF, EAFRD, Erasmus+) (Task 1)</p> <p>Surveys with EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Interviews with EU-level stakeholders and Member States' ministries coordinating the Funds (Task 3)</p> <p>Online focus groups - all (Task 4)</p>
31	All	How far is the synergy ensured?	<p>Level and type of operational integration</p> <p>Extent of existence (or absence) of mechanisms, tools or strategies to support synergies with other EU funding instruments active in supporting the digital and green transition</p>	<p>Forms of co-programming and operational integration during the implementation (coordination, joint call for tenders, etc.)</p> <p>Examples of mechanisms, tools or strategies to support synergies with other EU funding instruments active</p>	<p>Review of potential forms of co-programming and operational integration during implementation (Task 1)</p> <p>Surveys of ESF+ managing authorities (Task 2)</p> <p>Interviews with EU-level stakeholders and Member States' ministries coordinating the Funds (Task 3)</p> <p>Online focus groups (Task 4)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				<p>in supporting the digital and green transition</p> <p>Extent to which stakeholders agree that synergies with other EU funding instruments active in supporting the digital and green transition are ensured</p>	Case studies (Task 5)
32	All	How are the twin transitions related topics mainstreamed across the ESF+ activities?	Mechanisms exist (e.g. specific clauses, specialised units, etc.) to ensure that twin transitions related topics are mainstreamed across the ESF+ activities	<p>Existence of clauses for promoting twin transitions in designing the interventions and selection criteria</p> <p>Existence in the national and regional administration of specialised units or other mechanisms or tools dedicated to coordinate, support and monitor interventions in the transition sectors</p>	<p>Secondary sources: Analysis of selection criteria and other implementation documents (Task 1)</p> <p>Secondary sources: adopted programmes (Task 1)</p> <p>Survey with EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Interviews with all stakeholders at EU and national level (Task 3)</p>
33	SM	<p>Is the allocation of funds to the shared management strand programmes ensuring alignment/concentration of the funding to challenges identified in the European semester?</p> <p>Are any challenges being less addressed than others? Why?</p>	<p>Level of alignment and concentration on challenges identified in the European semester</p> <p>Level of alignment with key EU policies</p> <p>Extent of focus on different identified challenges</p>	<p>Comparison between resource allocation and recent challenges identified in the Country Reports, country-specific recommendations and key EU policies</p> <p>Analysis of challenges and recommendations less addressed</p>	<p>Adopted programmes and PAs (Task 1)</p> <p>SFC2021 (Task 1)</p> <p>Database of the CSRs (DG ECFIN or EP) (Task 1)</p> <p>Country-specific recommendations and country reports (European Semester (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
					Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)
34	SM	<p>Do the mainstream shared management strand specific objectives and those to help the social integration of the most deprived and to combat material deprivation better complement each other than former ESF and FEAD?</p> <p>What impact is this having on programming and implementation?</p>	<p>The integration of the objectives corresponding to the former ESF and FEAD within the same financing instrument increased the complementarity between relevant specific objectives in comparison to the previous period in strategic, financial, and operational terms</p>	<p>Allocation to SO(l) and (m) in national programmes and comparison with allocation under the previous programming period</p> <p>Evidence of complementarity between the relevant objectives in the ESF+ in the texts and in implementation (e.g. common or complementary types of operations/projects, strategic design, operational simplification, and major coordination between responsible bodies)</p> <p>Comparison with degree of complementarity between ESF &amp; FEAD in the previous programming period</p> <p>Evidence of integration of the two types of objectives (social integration and material deprivation) in the pathways to social inclusion and labour designed by the MAs / national authorities</p>	<p>Adopted programmes and Partnership Agreements (Task 1)</p> <p>Structured data transmissions available to date (Task 1)</p> <p>SFC2021 planned and updated expenditure data (Task 1)</p> <p>ESF+ impact assessment (Task 1)</p> <p>Secondary sources: Evaluations of ESF and FEAD (2014-2020) (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p> <p>Case studies (Task 5)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
35	I/DM	To what extent has the EaSI strand demonstrated internal coherence, and developed complementarities with the shared management strand, in responding to its operational/Specific Objectives (including mainstreaming of the horizontal principles) and to related policy priorities?	<p>The EaSI strand components (inputs, activities, outputs, etc) are overall coherent with the strand operational/specific objectives</p> <p>The EaSI strand components (inputs, activities, outputs, etc) are overall coherent with with related policy priorities</p> <p>The EaSI strand is overall coherent and complementary with the shared management strand in terms of operational/specific objectives</p> <p>The EaSI strand is overall coherent and complementary with the shared management strand in terms of related policy priorities</p>	<p>Analysis of internal coherence of the EaSI strand in line with operational/specific objectives (including mainstreaming of horizontal priorities) and related policy priorities</p> <p>Analysis and identification of complementarities between the EaSI and shared management strands in line with operational/specific objectives (including mainstreaming of horizontal priorities) and related policy priorities (e.g. allocation of funding, experimentation and innovation, integration and coordination of interventions, stakeholders, target groups, etc.)</p>	<p>FINAP data (Task 1)</p> <p>eGrants data (Task 1)</p> <p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>EaSI Annual Work Programmes (Task 1)</p> <p>First stakeholders' survey covering the 2021-2023 period (Task 1)</p> <p>Survey of EaSI stakeholders (Task 2)</p> <p>Interviews with EaSI stakeholders at EU and national level (esp. EaSI managers and Technical Working Group Members) (Task 3)</p> <p>Online focus group for EaSI (Task 4)</p> <p>Case studies (Task 5)</p>
36	I/DM	<p>How well is programming of direct and indirect management articulated with programming of shared management?</p> <p>How could it be improved?</p>	Degree of effective coordination between different management strands in developing ESF+ strategy and innovation (e.g. common timing, involving actors with a 'bridge' function, etc.)	Processes and their functioning to ensure the coordination of programming between the direct/indirect and shared management strands (e.g. preparation of the annual plan, joint timetable and processes for programming, internal coordination between Units and services, working group, involvement of national partners, etc.)	<p>Annual Work Programme (Task 1)</p> <p>Minutes of the EaSI working group (Task 1)</p> <p>EaSI portfolio (Task 1)</p> <p>Secondary sources: The ESF and community-led local development: Lessons for the future (Task 1)</p> <p>Survey with EaSI stakeholders (Task 2)</p> <p>Interviews with EaSI stakeholders at EU and national level, including indirect management stakeholders i.e. the Lithuanian European Social Fund Agency</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				<p>Evidence from tracking and monitoring tools on possible synergies</p> <p>Views from stakeholders on the degree to which articulation is working and how it could be improved</p>	<p>(EFSA), ESF Social Innovation + Initiative external experts &amp; European Competence Centres for Social Innovation (Task 3)</p> <p>Online focus group for EaSI (Task 4)</p> <p>Case studies (Task 5)</p>
37	I/DM	How is programming and implementation in indirect management impacting programme implementation (and scalability) under shared management?	<p>Extent of changes introduced in shared management programme implementation as a result of programming and implementation in indirect management</p> <p>Extent to which programming and implementation of indirect management is supporting scalability of implementation in the shared management strand</p>	<p>Changes introduced in shared management programme implementation as a result of programming and implementation in indirect management, and their nature</p> <p>Number of projects and results of from the indirect management strand scaled up under the shared management strand to date</p> <p>Identification of conditions of success /failure to scale up innovation and results of indirect management operations</p>	<p>EaSI portfolio of projects (Task 1)</p> <p>Survey of EaSI stakeholders (Task 2)</p> <p>Interviews with EaSI stakeholders at EU and national level (Task 3)</p> <p>Online focus groups (all) (Task 4)</p> <p>Case studies (Task 5)</p>
38	I/DM	Is the allocation of funds to the direct/indirect management strand programming ensuring alignment/concentration alongside the high-level policy challenges and priorities?	<p>Level of alignment and concentration on challenges and priorities identified in the European Semester</p> <p>Degree of focus on different identified challenges and priorities</p>	<p>Comparison between resource allocation to EaSI and transnational cooperation and the high-level policy challenges and priorities</p> <p>Challenges and priorities less addressed</p>	<p>Annual Work Programme (Task 1)</p> <p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>Survey of EaSI stakeholders (Task 2)</p> <p>Interviews with EaSI stakeholders at national level (Task 3)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
		Are any challenges/priorities being less addressed than others? Why?			Online focus group for EaSI (Task 4)
How did the EU intervention make a difference?					
EU Added value					
39	All	To what extent and how does the ESF+ support the implementation of the European Pillar of Social Rights?  Does the ESF+ make particular contributions to specific principles of the EPSR?	ESF+ is supporting the implementation of the objectives of the European Pillar of Social Rights by mobilising funds to thematic areas aligned to the objectives of the EPSR, orienting national policies and funding priorities, etc.	Resource allocation by policy areas in comparison to the objectives of the European Pillar and the progress of each MS in their respect and comparisons with national investments (LMP database, COFOG data, and other relevant databases)  Evidence of revision of national policies facilitated by the ESF+ in line with EPSR objectives	SFC2021 (planned allocation and expenditure) (Task 1)  Adopted programmes (Task 1)  Cohesion database (Task 1)  European social scoreboard statistics (Task 1)  ESF synthesis report (Task 1)  Survey with EaSI stakeholders and ESF+ managing authorities (Task 2)  Online focus groups (all) (Task 4)
40	All	Is programme design, including the performance framework, geared towards policy results?	ESF+ is designed in terms of fund structure, governance arrangements, enabling conditions, programming processes (e.g. PAs, Ops, etc), selected outputs and results indicators, to achieve policy results  Degree to which ESF+ programme design aims to achieve policy results	Clear and realistic definition of targets in terms of policy results  Evidence of alignment with key EU policies e.g. EPSR  Definition of targets and mechanisms to verify and adjust interventions in relation to policy results	ESF+ regulation and programmes (Task 1)  Structured data transmissions available to date (Task 1)  Secondary sources: Meta-analysis of the ESF counterfactual impact evaluations  Survey with EaSI stakeholders and ESF+ managing authorities (Task 2)

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
			(e.g. clear and realistic definition of policy targets)		Interview with ESF+ shared management stakeholders at national level (Task 3)  Online focus groups (all) (Task 4)  Case studies (Task 5)
41	All	<p>To what extent is the ESF+ more suited to increase the visibility and awareness of funded projects among stakeholders and citizens?</p> <p>To what extent were the quality, outputs, results and impacts of communication activities improved?<sup>241</sup></p> <p>Which factors may explain this?</p>	<p>A well targeted and efficient communication plan is in place</p> <p>Targeted actions are in place to promote the visibility of ESF+ to funded projects, stakeholders and citizens</p> <p>Communication on the results on the SOs and the two strands of ESF+ is consolidated and streamlined</p>	<p>The communication plan is approved, and its instruments and objectives/targets are coherent with the strategy of the programme</p> <p>Existence of taking on board evaluations or other reflections on lessons learned from the 2014-2020 communication activities</p> <p>Quality systems in managing and communicating ESF+ interventions</p> <p>Evidence (or absence of evidence) of streamlining of communications</p> <p>Stakeholders consulted agree that the communication on ESF+ led to greater visibility/reach/'brand' recognition of the fund compared with the previous programming period</p>	<p>Adopted programmes (Task 1)</p> <p>National documents related to implementation (Task 1)</p> <p>Member State evaluations and studies (Task 1)</p> <p>Relevant ESF+ communication strategies (Task 1)</p> <p>Available data on reach of communication (e.g. ESF+ website views, etc.)</p> <p>Secondary sources: analysis of resources and objectives of a sample of communication plans (Task 1)</p> <p>Surveys of EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Interviews with all stakeholders at EU and national levels (Task 3)</p> <p>Online focus groups (Task 4)</p> <p>Case study on EaSI communication strategy (Task 5)</p>

<sup>241</sup>The formulation of this question was changed upon request from the ISG.

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
Is the intervention still relevant?					
Relevance					
42	All	<p>To what extent does the ESF+ intervention logic (continue to) respond strategically to the overall/changing policy context, related priorities, and general objectives of the fund and in particular to the related (stakeholders') needs?</p> <p>Are there particular emerging challenges or priorities which are not sufficiently covered?</p>	<p>ESF+ intervention logic was overall aligned to the overall/changing policy context, related priorities, and general objectives of the fund and in particular to the related (stakeholders') needs</p> <p>ESF+ intervention logic is still aligned to the overall/changing policy context, related priorities, and general objectives of the fund and in particular to the related (stakeholders') needs</p> <p>There are no emerging challenges or new priorities that are not covered by ESF+ Intervention logic</p>	<p>Analysis of the trends in the social scoreboard indicators to identify main changes at EU and national level</p> <p>Views from consultations on the degree to which stakeholder needs are being met</p> <p>Critical review of the ESF+ intervention logic in comparison to the evolution of the contextual conditions</p> <p>Analysis of the degree to which ESF+ is contributing to the objectives of the NRRPs, especially in the larger beneficiary MSs</p>	<p>Eurostat data related to ESF+ Interventions (SOs) at EU and national/regional level (Task 1)</p> <p>SFC2021 data (expenditure and initial results) (Task 1)</p> <p>NRRPs financial monitoring (Task 1)</p> <p>Database of the CSRs (DG ECFIN or EP) (Task 1)</p> <p>ESF+ Intervention Logic</p> <p>Survey with EaSI stakeholders and ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ managing authorities and EaSI stakeholders at EU level (Task 3)</p> <p>Online focus groups (all) (Task 4)</p>
43	All	<p>Are the (common/specific) indicators relevant?</p> <p>Are any less relevant than others?</p>	<p>Common/specific indicators are suited to cover and ensure meaningful monitoring of key specific objectives</p> <p>Common/specific indicators remain relevant in light of actual and emerging needs</p>	<p>Analysis of the common/specific indicators in relation to resource allocation, most important funded interventions, socio-economic trends and policy priorities</p> <p>Analysis of the explicative capacity of the indicators in relation to the ESF+ intervention logic</p>	<p>ESF+ regulation, Annexes and intervention logic (Task 1)</p> <p>SFC2021 (common and specific indicator values, available by programme and type of action) (Task 1)</p> <p>Structured data transmissions available (Task 1)</p> <p>Survey with EaSI stakeholders (for Annex IV indicators) and ESF+ managing authorities (for Annex I-III indicators) (Task 2)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
				Views from consultations of key stakeholders on the degree to which indicators are relevant	Interviews with EaSI stakeholders (for Annex IV indicators) and ESF+ managing authorities (for Annex I-III indicators) (Task 3)  Online focus groups (all) (Task 4)
44	SM	How responsive are the programmes to policy changes?	ESF+ is able to accommodate and adapt to policy changes  Constraints/hurdles to reprogramming are justified and reasonable	Analysis of rules, partnership dialogue and decisional processes used in the MA, Monitoring Committees and in the PA to adjust programmes  Identification of issues currently being considered by MSs for possible changes in the mid-term review  Views from consultations of key stakeholders on the degree to which programmes are responsive to policy changes	Adopted programmes (Task 1)  SFC2021 (Task 1)  Database of the CSRs (DG ECFIN or EP) (Task 1)  Country-specific recommendations and country report (European Semester) (Task 1)  Secondary sources: Relevant studies (e.g., study on the implementation of the partnership principle and multi-level governance in 2014-2020 ESI Funds, currently carried out by DG Regio) (Task 1)  Secondary sources: 2014-2020 ex-post evaluations of Funds (WP10 of DG Regio)
45	SM	What is the role of the European Semester in programming and implementation?	The European Semester is taken into account in and influence programming decisions  The European Semester is taken into account in and influence the implementation of ESF+  There are mechanisms and processes to foster ESF+ programming and implementation alignment with the	Analysis of ESF+ contributions to National Reform Programmes  Identification (where relevant) of mechanisms and processes which have been introduced to foster alignment with the European Semester at EU and national level  Analysis of the degree to which the challenges in the EC's Country Reports and the country-specific recommendations are reflected in	Survey with ESF+ managing authorities (Task 2)  Interviews with ESF+ shared management stakeholders at EU and national level (Task 3)  Online focus groups (all) (Task 4)  Case studies (all) (Task 5)

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
			European Semester at EU and national level	<p>ESF+ programming and implementation</p> <p>Identification of planned or actual modifications of the programmes related to the Semester</p> <p>Views from consultations of key stakeholders on the role of the European Semester in programming and implementation</p>	
46	SM	How useful is the alignment with the semester and are the provisions in the ESF+ regulation and in the CPR (mid-term review) sufficient to ensure this alignment?	<p>ESF+ is able to reinforce and accelerate the national structural reforms</p> <p>Provisions in the ESF+ regulation and the CPR are enough to ensure alignment with the European Semester</p>	<p>Identification of examples and typology of benefits of alignment with the European Semester (alignment with structural challenges)</p> <p>Analysis of the effectiveness and enforcement capability of the provisions in the ESF+ regulations and the CPR to align programmes with the Semester</p>	
47	SM	Have the thematic concentration, categories of regions and the mandatory use of dedicated priorities for social innovation and social experimentation been instrumental in addressing the needs on the ground?	ESF+ capacity to address the key needs on the ground has been fostered by (a) thematic concentration, (b) categories of regions and (c) the mandatory use of dedicated priorities for social innovation and social experimentation	<p>Analysis of allocation of resources in comparison to main regional/national needs (by priority and Specific Objective)</p> <p>Use of the Article14 of the ESF+ in the MSs (types of innovation and experimentation, verification of the innovation, etc.)</p>	

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
		In what ways?		Views from consultations of key stakeholders on the role of a) thematic concentration, (b) categories of regions and (c) the mandatory use of dedicated priorities for social innovation and social experimentation in meeting key needs on the ground	
48	SM	Are all enabling conditions and the monitoring of their constant fulfilment and application relevant?	<p>Actual improvements derived from the enabling conditions</p> <p>Actual improvements derived from the monitoring of enabling conditions to ensure the constancy of their fulfilment and application</p>	<p>How application and monitoring of the enabling conditions are working (responsible bodies, information system, enforcement capacity, etc.)</p> <p>Number of cases in which enabling conditions were not fulfilled initially or ceased to be fulfilled during the implementation</p> <p>Actual commitment of national authorities in using enabling conditions to improve national policies</p> <p>Actual delay in fulfilling the conditions</p> <p>Concrete examples of consequences in case enabling conditions were not fulfilled</p>	<p>Adopted programmes and Partnership Agreements (Task 1)</p> <p>Audit reports (Task 1)</p> <p>National legal acts regulating the implementation of ESF+ (Task 1)</p> <p>Structured data transmissions available to date (Task 1)</p> <p>Secondary sources: National strategic plans associated with the enabling conditions (Task 1)</p> <p>SFC2021 (Task 1)</p> <p>Survey with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management stakeholders at national level (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
49	SM	Are the programmes and the programming architecture suitable to pursue cohesion policy objectives while also responding to emerging crises and stakeholders' needs, or should there rather be a dedicated response instrument?	<p>Extent of flexibility of programmes/programming architecture to both pursue Cohesion Policy objectives and respond to emerging needs and crises</p> <p>Identification of potential trade-offs between structural and long-term investments and crisis responses</p> <p>Degree of effectiveness of dedicated response instruments under the previous programming period (e.g. CRII, CRII+, REACT-EU, CARE, etc.)</p>	<p>Identification of the capacity of the ESF+ programme structure to include new and unexpected objectives</p> <p>Analysis of the outcomes of evaluations on the effectiveness and efficiency of dedicated response instruments under the previous programming period (e.g. CRII, CRII+, REACT-EU, CARE, etc.)</p> <p>Identification of costs (new learning process, design of new implementation procedures, etc.), benefits (new measures do not affect absorption rate, better accountability, etc.) and potential trade-offs (e.g. on alignment with CSR) of adopting a new financial instrument for emergencies. Differences according to contexts and according to the type of crisis shock (asymmetric/homogenous; supply/demand; etc.)</p>	<p>Evaluations of dedicated response instruments under the previous programming period (e.g. CRII, CRII+, REACT-EU, CARE, etc.) (Task 1)</p> <p>Surveys with ESF+ managing authorities (Task 2)</p> <p>Interviews with ESF+ shared management strand stakeholders at all levels (Task 3)</p> <p>Online focus group for SO(a) to SO(l) and online focus group for SO(m) (Task 4)</p>
50	I/DM	To what extent has the shape and scope of the direct and indirect management strand ascertained relevance, budgetary flexibility and administrative simplification in the procedures/processes	Compared to the previous programming period, the direct and indirect management strand operational architecture is better able to address relevance, flexibility and simplification in terms of timing of decisions, addressing emerging needs and simplifying managerial processes	<p>Estimated (or recorded) 'response time' to new needs and flexibility of the annual Work Programmes</p> <p>Comparison of the allocation of resources of the direct and indirect management strands to policy priorities and identified needs</p>	<p>Annual Work Programmes (Task 1)</p> <p>Monitoring data for the period 2021-2023 (Task 1)</p> <p>First stakeholders' survey covering the 2021-2023 period (Task 1)</p> <p>Survey of EaSI stakeholders (Task 2)</p>

N	Strand	Questions	Judgment criteria	Indicators/descriptors	Data source
		(related to application, selection, reporting) to respond to policy priorities and stakeholders needs?		<p>Simplifications introduced in the direct and indirect management strands</p> <p>Flexibility of the decision-making mechanisms and processes (e.g. application, selection, reporting) of the direct and indirect management strands to respond to policy priorities and identified needs</p>	<p>Interviews with EaSI stakeholders at national level (Task 3)</p> <p>Online focus group for EaSI (Task 4)</p>

**ANNEX IV. OVERVIEW OF BENEFITS AND COSTS AND TABLE ON SIMPLIFICATION AND BURDEN REDUCTION**

*Table 1. Overview of costs identified in the evaluation*

		<b>Administrative cost for the ESF+.</b> For more details, see description in <a href="#">Annex II</a> .	
		Cost in million	Additional information
<b>Programme authorities</b>			
Preparation	Recurring	ESF+ programmes: 138 Multi-fund programmes: 153 Total ESF+: 291	Total administrative costs for programme authorities for the whole period (until 2029). ESF+ cost share in multi-fund programmes is calculated assuming that it equals the share of ESF+ allocations (27%) in the multi-fund programmes.
General management	Recurring	ESF+ programmes: 296 Multi-fund programmes: 212 Total ESF+: 507	Total administrative costs for programme authorities for the whole period (until 2029). ESF+ cost share in multi-fund programmes is calculated assuming that it equals the share of ESF+ allocations (27%) in the multi-fund programmes.
Financial management	Recurring	ESF+ programmes: 242 Multi-fund programmes: 226 Total ESF+: 468	Total administrative costs for programme authorities for the whole period (until 2029). ESF+ cost share in multi-fund programmes is calculated assuming that it equals the share of ESF+

			allocations (27%) in the multi-fund programmes.
Operations	Recurring	ESF+ programmes: 894 Multi-fund programmes: 966 Total ESF+: 1,860	Total administrative costs for programme authorities for the whole period (until 2029). ESF+ cost share in multi-fund programmes is calculated assuming that it equals the share of ESF+ allocations (27%) in the multi-fund programmes.
Reporting, monitoring and evaluation	Recurring	ESF+ programmes: 144 Multi-fund programmes: 117 Total ESF+: 261	Total administrative costs for programme authorities for the whole period (until 2029). ESF+ cost share in multi-fund programmes is calculated assuming that it equals the share of ESF+ allocations (27%) in the multi-fund programmes.
Audit	Recurring	ESF+ programmes: 153 Multi-fund programmes: 54 Total ESF+: 208	Total administrative costs for programme authorities for the whole period (until 2029). ESF+ cost share in multi-fund programmes is calculated assuming that it equals the share of ESF+ allocations (27%) in the multi-fund programmes.
Total administrative cost for programme authorities		ESF+ programmes: 471 Multi-fund programmes: 312 Total ESF+: 782	These are total administrative costs for programme authorities incurred by end 2024. Data for multi-fund programmes include only the ESF+ share of the administrative costs (assuming that it is equal to the share of the ESF+ allocations of the multi-fund programmes)

Beneficiaries <sup>242</sup>			
Application	One-off	The process of applying for funding can be broken down into three main sub-tasks: 1) gathering information, 2) preparing and submitting the application documents, 3) replies to requests for more information and/or documentation after submission	The administrative burden of the application process varies considerably across the CPR funds and Member States, with differences in time, staffing and outsourcing costs. ESF+, multi-fund and ERDF programmes have generally lower costs than other CPR funds programmes.  Gathering information and preparing and submitting the application documents are rated as the most time-consuming activities (N=199).
Project management	Recurring	This task mainly consists of 1) preparing and submitting payment requests 2) information and communication requirements 3) keeping of records	Differences across funds and MS similar to the application process described above. ESF+ programmes tend to have slightly higher costs than ERDF and multi-fund programmes, but lower than other CPR funds programmes  According to beneficiaries, preparing and submitting payment requests is the most demanding task (N=190).
Reporting and monitoring	Recurring	This task mainly consists of 1) preparing and submitting monitoring data 2) collection and submission of information regarding project evaluation.	Differences across funds and MSs both in workload and outsourcing costs.  Preparing and submitting monitoring data is perceived as the most time-consuming activity (N=185).

<sup>242</sup>The conclusions in this section are based on the responses of the beneficiaries of all CPR funds, not only ESF+.

Management and verification	Recurring	<p>This task mainly consists of 1) collection and submission for audits and inspections 2) participation in management verifications 3) follow-up on post-control/audit recommendations.</p>	<p>Collection and submission for audits and inspections is perceived as the most time consuming (N=174). Differences across funds and MS. ESF+ programmes tend to have slightly higher costs than ERDF and multi-fund programmes, but lower than other CPR funds programmes.</p>
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<i>Table 2. Simplification and burden reduction</i>	
	Assessment of simplification <i>Based on stakeholder feedback, net effect as a difference between cost saving and cost increase potential. See <a href="#">Annex II</a> description on categorisation.</i>
Estimated cost savings for programme authorities for the ESF+ programmes (until end 2029)	EUR 716 m
No obligation to conduct an ex ante evaluation	Significant (4)
Simplified designation of authorities	Significant (3)
Simpler rules on management costs and fees	Moderate (1)
Reducing the number of verifications	Significant (3)
A more proportionate approach to audits (EPAs)	Significant (2)
Use of unit costs, lump sums, flat rate or a combination of those as set in accordance with Art 94.4 CPR (Delegated Acts prepared by COM)	Significant (4)
Use of unit costs, lump sums, flat rate or a combination of those as set in accordance with Art 94.2 CPR (SCOs set by MS as an integral part of programme)	Significant (4)
Technical assistance may be reimbursed in proportion to progress in implementation, using a flat-rate	Significant (4)
Reimbursement to beneficiaries in accordance to Art 53.2 CPR (obligatory use of SCOs for smaller operations, i.e. operations where the total cost does not exceed EUR 200,000)	Significant (4)
Increase in the share use of simplified cost options under ESF+ shared management from 33% in the 2014-2020 period to 40% in 2024	Saving between EUR 96 million and EUR 141 million

<sup>243</sup> These are estimates for the ESF+ programmes only and do not include estimates for the ESF+ share of the multi-fund programmes, as estimates for multi-fund programmes were not available.

## ANNEX V. STAKEHOLDERS CONSULTATION - SYNOPSIS REPORT

### 1. Consultation activities

Stakeholder consultation activities aimed at gathering the views of stakeholders involved in the design, programming and implementation of ESF+ for the 2021-2027 programming period. The study included the following consultation activities:

- Two targeted online surveys (one for each strand);
- Targeted interviews for each strand, at the European and national levels;
- Call for evidence;
- Two focus groups (one for each strand);
- Three case studies, each including targeted interviews with relevant stakeholders, on the following topics: (i) Social innovation and experimentation; (ii) Promotion of social integration and addressing material deprivation of the most deprived; (iii) EaSI communication strategy.

Table below presents an overview of the different stakeholder groups consulted across these stakeholder consultation activities.

**Table 1 – Overview of stakeholder groups across consultation activities**

Stakeholder category	Strand	Interviews	Targeted surveys	Focus Groups	Case studies
European Union officials	Both				
European Social Fund Agency (ESFA) <sup>244</sup>	EaSI				
ESF+ Committee members	Both				
EaSI Technical Working Group members	EaSI				
National ministries	Shared				

<sup>244</sup>This includes ESFA's Advisory Board members.

ESF+ Coordinating bodies (national level)	Shared	■	■	■	■
Managing authorities <sup>245</sup> and intermediate bodies	Shared	■	■	■	■
Intermediate bodies	Shared	■	■	■	■
Youth Guarantee coordinators	Shared	■	■	■	■
Child Guarantee coordinators	Shared	■	■	■	■
EU-level networks <sup>246</sup>	EaSI	■	■	■	■
ESF+ beneficiaries	Shared	■	■	■	■
Project promoters	EaSI	■	■	■	■
Organisations representing participants	Both	■	■	■	■
Academic / research organisations	Shared	■	■	■	■
Others <sup>247</sup>	Shared	■	■	■	■

Source: Ecorys consortium, 2025

## 1.1 Targeted surveys

Two online surveys covering the shared management strand and the EaSI strand of ESF+ were launched. The main objective of the two surveys was to collect quantitative and qualitative information on the changes in the programming and implementation of ESF+, compared to the previous programming period.

- The shared management strand survey was launched on 3 and 4 April 2024 and remained open until 24 May 2024, following a seven-working-day extension. The survey was administered to all managing authorities in EU 27;
- The EaSI strand survey was launched on 15 April 2024 and remained open until 31 May 2024, following a 12-working-day extension. The survey was administered to

<sup>245</sup>This includes both national and regional Managing Authorities.

<sup>246</sup>This includes the EU-level networks in the field of social inclusion and poverty reduction, as well as in microfinance and social enterprise finance that are benefitting from the EaSI strand's Framework Partnership Agreements.

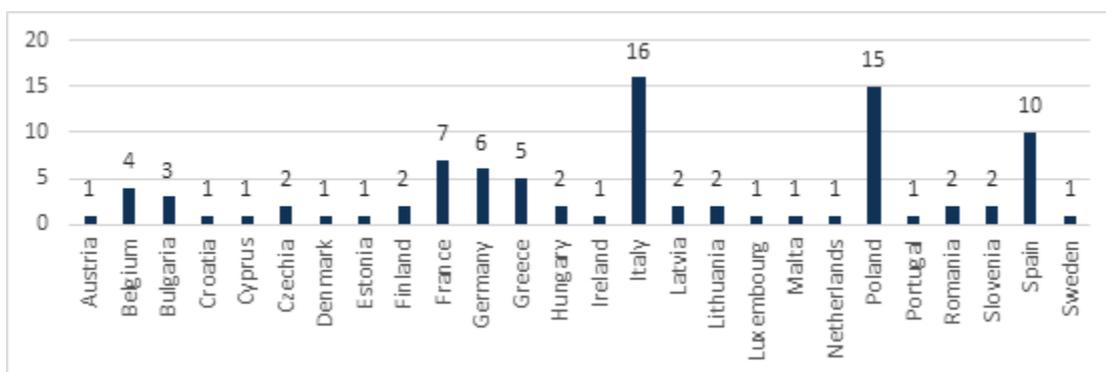
<sup>247</sup>This includes social partners and ESF+ monitoring committees' members (national level).

the EaSI Technical Working Group (TWG) members, the National Contact Points for the EaSI strand (NCPs), the National Competence Centres for Social Innovation (NCCs), the EU-level networks (see Table 1), project promoters, and transnational cooperation actors.

Figure 1 presents the distribution of managing authorities' responses to the shared management survey, which collected 91 responses covering 26 Member States and approximately 55% of the 169 ESF+ programmes.

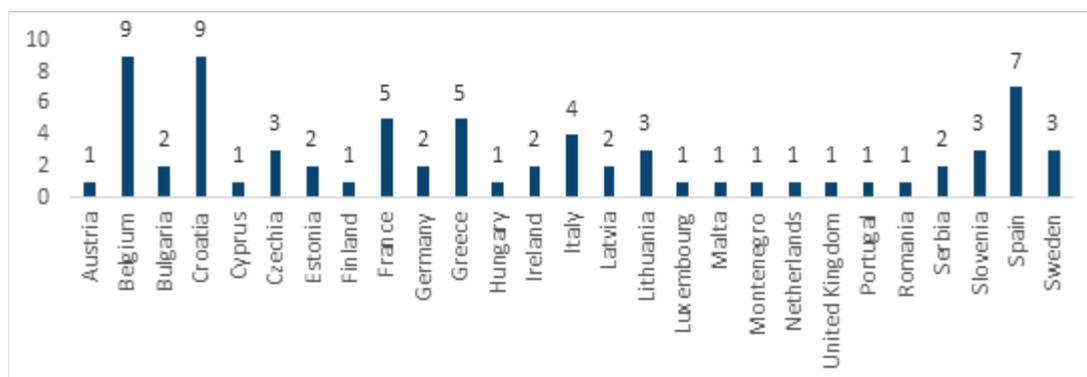
Figure 2 presents the distribution of responses to the EaSI strand survey, which collected 74 responses covering 24 Member States, plus Montenegro, Serbia and the United Kingdom. Figure 3 presents the distribution of responses to this survey across different stakeholder groups.

**Figure 1 – Distribution responses across Member States for the shared management strand (managing authorities) (N=91)**



Source: Ecorys consortium, 2025

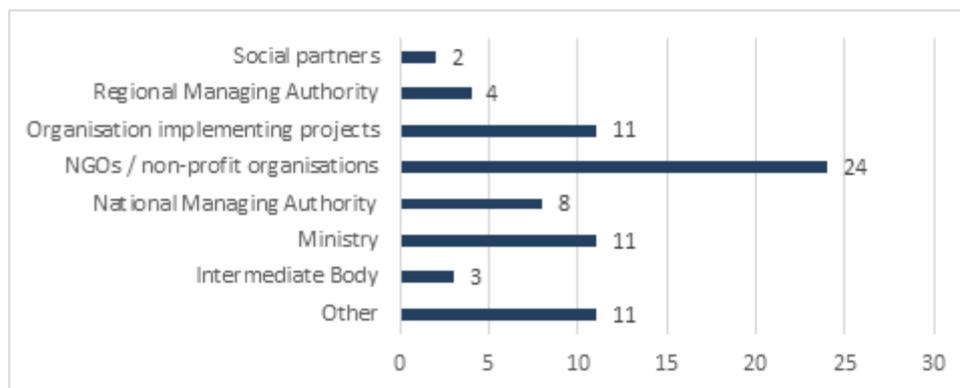
**Figure 2 – Distribution of responses across Member States for the EaSI strand / (in)direct management survey (N=74)<sup>248</sup>**



Source: Ecorys consortium, 2025

<sup>248</sup>No answers were received by stakeholders in Denmark, Poland and Slovakia. Please note that the figure also lists the number of stakeholders from participating third countries (e.g. Montenegro) as well as from third countries that could participate in the EaSI strand under the previous programming period (e.g. the United Kingdom).

**Figure 3 – Distribution of responses across categories of respondents for the EaSI strand/(in)direct management survey (N=74)**



Source: Ecorys consortium, 2025

The questionnaire of the two surveys, along with the processes around the implementation, dissemination, analysis and reporting, are available in Annex 1 of the Final report of the supporting study.

## 1.2 Targeted interviews

Targeted interviews were conducted with the stakeholder groups listed in Table 1 in two successive waves, enabling the data collected through the first wave to inform the research questions of the second wave, in order to complement the study findings and address potential evidence gaps.

The first wave of interviews took place between 22 January 2024 and 8 March 2024 while the second wave took place between 15 March 2024 and 15 June 2024. The main aim of these interviews was to substantiate the study analysis with specific examples of potential changes between the two programming periods, and to describe the effects of these changes, including the unintended ones.

As Table below shows, a total of 360 interviews were conducted as part of the study. These interviews involved over 500 individuals. As shown in the table below, 41 interviews were conducted at EU-level and 319 at the national level.

**Table 2 – Total number of targeted interviews**

EU level		National level	
Shared	EaSI	Shared	EaSI
12	29	265	54

Source: Ecorys consortium, 2025

Source: Ecorys consortium, 2025

Table 4 provides the breakdown by category of stakeholders consulted for the EaSI strand. Annex 1 of the Final report also details the approach to the first and second wave of interviews, the sampling approach, and the processes of implementation, analysis and reporting. Additionally, it includes the interview questionnaires and a list of the consulted organisations.

**Table 3 – Distribution of interviews per Member State for the shared management strand (national level)**

AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK
9	12	9	6	9	11	8	7	11	14	8	11	9	9	9	12	10	8	9	9	9	13	13	14	7	9	10

Source: Ecorys consortium, 2025

**Table 4 – Distribution of interviews across EaSI stakeholders, (in)direct management strand**

Stakeholder category	Number of interviews conducted
National Contact Points (NCPs)	15 <sup>249</sup>
Project promoters (indirect)	7 <sup>250</sup>
Project promoters, including EU-level networks (direct)	21 <sup>251</sup>
Competence Centres for Social Innovation (CCSI)	5
Communities of Practices	5
Other	1
Total	54

Source: Ecorys consortium, 2025

### 1.3 Call for evidence

The European Commission launched a call for evidence for the ESF+ mid-term evaluation. The call for evidence was open from 16 January 2024 to 13 February 2024 and received a total of 59 contributions.

<sup>249</sup>The following National Contact Points were interviewed: BG, CY, CZ, DE, FR, HU, IE, IT, MT, PT, RO, SE, SI, SK, ME.

<sup>250</sup>These are project promoters of the ALMA call for proposals under indirect management from the following Member States: EL, LT, MT, PL, RO, SK. A representative of the ALMA network was also interviewed.

<sup>251</sup>Project coordinators from the following countries were interviewed: BE, DE, ES, FR, IT, PL, PT, SE, RS, NO.

The majority of contributions came from EU citizens (27%, 16 out of 59), followed by NGOs (24%, 15 out of 59), companies/businesses (19%, 11 out of 59), public authorities (15%, 9 out of 59). A smaller share of responses came from respondents classified as ‘other’ (8%, 5 out of 59), business associations (3%) and academic/research institutions (1%).

In total, participants from 12 EU Member States took part in the call for evidence<sup>252</sup>. The majority came from Germany (44%, 25 out of 59), Belgium (24%, 14 out of 59) and Sweden (8%, 5 out of 59). The remaining countries each accounted for between 2% (1 out of 59) and 5% (8 out of 59) of the total participants.

#### 1.4 Case studies

Three case studies were developed as part of the study to get in-depth insights into the topics of social innovation and experimentation, promotion of social integration and addressing material deprivation of the most deprived, and the EaSI communication strategy. Table below presents the number of consultations that took place as part of the case studies and lists the stakeholder groups and the countries involved.

**Table 5 – Consulted stakeholders in case studies**

Case study	Member States	Managing authorities	Beneficiaries
Social innovation and experimentation	BE, EL, IE, IT, PL, SK		
Promotion of social integration	BG, DE, EL, FI, IE, IT, LV, RO		
EaSI communication strategy	BE, DE, ES, FR, HU, IT, PO, SE		

Source: Ecorys consortium, 2025

For the EaSI communication strategy case study, additional interviews with DG EMPL and ESFA were also conducted.

Annex 1 of the Final report presents more information around the sampled countries, the processes of implementation, analysis and reporting, as well as the case studies’ interview questionnaires.

#### 1.5 Focus Groups

As part of the study, two focus groups (FGs) took place, one for the indirect management (EaSI) strand, on 9 July 2024, and one for the shared management strand, on 10 July 2024. The purpose of the FGs was to consolidate and validate the study analysis, and supplement it with additional examples, measures, and good practices that could feed into the remainder of the 2021-2027 period, or into ESF+ post-2027.

<sup>252</sup> BE, CZ, DE, ES, FI, FR, HU, IT, PL, PT, RO, SE.

- The FG for the EaSI strand gathered 41 participants<sup>253</sup> including EaSI Technical Working Group members, EU-level networks and project promoters under the EaSI strand, and members of the communities of practice;
- The FG for the shared management strand gathered 49 participants<sup>254</sup> including ESF+ Coordinating Bodies, ESF+ managing authorities, Ministries, social partners and organisations implementing operations.

## 1.6 Methodology for data processing

All stakeholder consultations followed specific data processing and analysis protocols that are described in detail in Annex 1 of the Final report.

**Targeted surveys** were administered to participants via the EUSurvey platform. The analysis of the close-ended responses to the survey was conducted in Microsoft Excel. It was based on descriptive statistics presented in tables, graphs and charts, making the information easier to digest, including for non-expert readers. In turn, the open-ended responses to the survey were organised (grouped) by theme. Due to the small sample size, the dataset was not conducive to subgroup analysis, and therefore such analysis was not performed as part of the study.

**Targeted interviews** were transcribed in MS Excel sheets, that were organised by group of evaluation questions. This facilitated the subsequent analysis that informed the Interim and the Final reports.

Contributions to the **call for evidence** were compiled in a Word document and categorised according to the group of evaluation questions for which they were relevant.

**Case study** interviews were collected and analysed either by group of Member State or by group of stakeholder, depending on the case study, and were used to produce the standalone case study reports.

**Focus groups** outcomes were collected in summary reports drafted by the study team that were used to finetune the findings and lessons learnt of the Final report.

## 1.6 Limitations of stakeholder consultation activities

Overall, the technical nature of the evaluation questions, combined with the multiple concurrent consultation activities during the study in the context of other EU and national evaluations, made it challenging to engage with relevant stakeholders and obtain meaningful information. To address this issue, the study team dedicated significant resources to continuously assist national experts in adapting the interview questionnaires to specific stakeholders and ensure appropriate follow-up to secure the most relevant interviews.

## 2. Findings across ESF+ as a whole

### Effectiveness

#### Synergies between the shared management and EaSI strands

Stakeholder consultations pointed to mixed views as to whether the merger of the shared management and the EaSI strands under ESF+ led to more synergies between them in this programming period, compared to the previous one. Only 16% (15 out of 91) of the

<sup>253</sup>This number includes the European Commission and the study team's members.

<sup>254</sup>This number includes the European Commission and the study team's members.

surveyed managing authorities reported that the merger had positive effects on synergies, while 28% (26 out of 91) reported no changes at all. Indeed, despite several mechanisms put in place to foster synergies, including the ESF+ Social Innovation+ initiative, only 3% (3 out of 91) of the managing authorities reported having plans to introduce changes in their programming based on the indirect management's programming, implementation or communication activities. Member States' hesitancy to earmark ESF+ resources for social innovation amid competing national political priorities and constrained budgets, fragmentation of social innovation responsibilities between different ministries and at EU level, low level of awareness of social innovation projects, and difficulties in adapting EaSI projects in the regulatory framework of ESF+ were key barriers to synergies identified in interviews with all stakeholder groups across several EU countries<sup>255</sup>.

### Focus on policy results

Overall, compared to the previous programming period, stakeholder consultation activities pointed to a stronger emphasis of ESF+ on policy results. About one out of three surveyed managing authorities reported that ESF+ aims to fund operations which prioritise delivering results to a larger, or much larger extent, compared to the previous programming period (41%, 37 out of 91). Similar views were held by stakeholders who took part in the EaSI strand survey (42%, 26 out of 62).

Key recommendations for improvements on gearing the ESF+ to deliver policy results that emerged from all stakeholder consultation activities included: developing tools and methodologies to better measure policy impacts; increased partnership and dialogue with the European Commission during programming; support to design specific indicators to measure the degree to which specific policy needs are being met; greater involvement of social partners and civil society, including earmarked funding and capacity-building to allow their voice to be heard; and standardising guidelines across Member States on calls for proposals (e.g. duration for which the calls are open) to foster more coherent policy alignment.

### Findings for ESF+ shared management strand

#### Programming phase

The majority of surveyed managing authorities suggested that Partnership Agreements were useful either to a moderate or to a large extent in terms of helping them define their objectives (64%, 58 out of 91) and allocate the funding where it is needed the most (61.5%, or 56 out of 91 respondents). According to interviewed stakeholders, the size and governance model of the Member States can affect their degree of usefulness.

Merging YEI into ESF+ was reported as a positive step. The majority of surveyed managing authorities reported that this merging had a strong or a moderately positive effect on the programming (74%, or 47 out of 63) and implementation of the ESF+ (67%, or 39 out of 58), as well as on complementarity with the roll-out of the Youth Guarantee (68%, or 41 out of 60).

The consultation results were somewhat more mixed for the integration of FEAD into ESF+. Half of the surveyed managing authorities considered that the change brought moderate or positive effects in terms of programming (49%, 27 out of 55) and implementation (49%, 25 out of 51), while the other half reported no or only negative effects (51%, 28 out of 55 and 51%, 26 out of 51, respectively). However, these findings

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<sup>255</sup>BE, EE, EL, ES, ES, FR, IE, LV

are to be seen as preliminary, with stakeholder consultations suggesting that it is generally too early to draw clear conclusions on the effects of the merger.

Looking into the future, strong coordination at the programming level through the systematic involvement of social partners, as well as adopting elements of the results-oriented approach of the Recovery and Resilience Facility, emerged as key factors during the interviews that could facilitate the programming process.

#### Horizontal and thematic enabling conditions

The majority of stakeholders surveyed reported that horizontal and thematic enabling conditions contributed to the effective and efficient use of ESF+. The interviews also revealed that stakeholders recognise the importance of the constant fulfilment of the enabling conditions and provided examples showing their potential to lead to structural investments.

#### Efficiency

##### Findings for ESF+ shared management strand

##### Simplification measures

Consulted stakeholders across various consultation activities (surveys, interviews, focus groups, call for evidence) praised simplified cost options (SCOs) for reducing administrative burden<sup>256</sup> but cited the set-up time and lack of benefits for project beneficiaries as their main drawbacks. Indeed, several EU-networks and project promoters pointed out during the interview programme and the focus groups, that despite the SCOs, they still had to keep analytical records for auditing purposes, leading to “double-reporting”.

Consulted stakeholders also revealed an appetite for the use of financing not linked to costs (FNLCs) in the future, although they noted that their use does not come without its challenges. For example, several interviewees reported that FNLCs are based on the expectation that beneficiaries can bear the majority of costs until they reach the so-called milestones, as well as on the expectation that implementation on the ground will go as planned.

##### Centralised vs. decentralised structures

Overall, consultations pointed to a widely recognised trade-off between effectiveness and efficiency in programme design and implementation (supported by central structures) and ensuring relevance in meeting the needs of specific ESF+ target groups (supported by decentralised structures). Indeed, the largest share of surveyed managing authorities agreed that a centralised approach is more beneficial for saving time in decision-making (39%, 35 out of 91) and concentrating investments (29%, 26 out of 91). Conversely, a large proportion of these authorities disagreed or strongly disagreed that such an approach is more beneficial for meeting subnational needs (71%, 65 out of 91) or involving relevant stakeholders (72%, 66 out of 91).

##### Findings for ESF+ EaSI strand

##### Simplification of administrative processes and of the monitoring system

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<sup>256</sup>Over 90% of the surveyed managing authorities (85 out of 91) reported this as the main advantage of SCOs.

The introduction of eGrants system was broadly regarded by stakeholders consulted as a positive step in terms of reducing administrative burden, with about half of respondents to the EaSI survey agreeing that it successfully streamlined the grant management process (50%, 16 out of 32). Interview data revealed that indeed, through eGrants, compared to the previous programming period, the timeframe for contract signing was reduced from several weeks to just 24-48 hours, helping projects to start faster. Despite the benefits, stakeholders across all consultation activities highlighted the significant time required to become familiar with the system and pointed out several areas for improvement, particularly the need to enhance eGrants user-friendliness. Interview data also emphasized the necessity to reduce duplications in the application, monitoring, and reporting processes for projects. This includes financial reporting, where reporting unit costs was reported to impose a significant burden on project promoters. According to some stakeholders, improving these aspects could help attract smaller applicants to EaSI.

### Coherence

Stakeholder consultations revealed strong complementarities between ESF+ and other funding instruments active in human capital investment, principally with ERDF, EAFRD and AMIF<sup>257</sup>. Although such complementarities were broadly reported to be similar to those in the previous programming period, they appear to have improved for ERDF and AMIF<sup>258</sup>. However, some stakeholders in interviews, focus groups, and the call for evidence pointed to overlaps and limited complementarities, particularly evident with Horizon Europe and Erasmus+ funds, due to differences in management mode, timing and scale of the projects.

Consulted stakeholders were generally more positive around the coherence of ESF+ with funding instruments in the digital and green transition (e.g. RRF, JTF). 51 interviewees from various stakeholder groups in several EU countries<sup>259</sup> found ESF+ to be coherent with these instruments and provided several examples of complementarities in practice. However, some stakeholders, e.g. in IE and SE, highlighted the need to avoid overlaps and displacement between ESF+ and these instruments. Focus group and call for evidence data emphasised the importance of the programming phase in this regard.

### European Value Added

#### ESF+ and the European Pillar of Social Rights

The majority of surveyed managing authorities reported that ESF+ supports the implementation of the European Pillar of Social Rights (EPSR) in their Member States (90%, 81 out of 91). The good alignment between the ESF+ and EPSR was further confirmed in interviews with ESF+ Coordinating bodies, managing authorities, social partners, and beneficiaries, amongst others. At the same time, however, a minority of interviewees at both the EU and national levels expressed some concerns about the EPSR principles being too high-level for ESF+ to have a concrete impact. Key recommendations that emerged during the consultation activities for improving alignment with EPSR included: giving national ministries, and even local stakeholders a bigger role in transforming the EPSR into national and local actions; raising awareness and more

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<sup>257</sup> Specifically, 74% (67 out of 91), 41% (37 out of 91), and 48% (44 out of 91) of surveyed managing authorities reported their ESF+ program activities to be complementary with ERDF, EAFRD, and AMIF.

<sup>258</sup> For ERDF, 23 out of 91 and for AMIF, 22 out of 91 surveyed managing authorities reported these synergies to be stronger, or much stronger compared to the previous programming period.

<sup>259</sup> AT, BG, CZ, DE, EE, ES, FI, HR, IE, IT, MT, NL, PL, PT, RO, SI, SE, SK

communication on the EPSR principles and its role in defining ESF+ investments; defining tools, indicators and / or methods to assess the contribution of ESF+ to EPSR.

## Relevance

### ESF+ Alignment with European Semester

Stakeholder consultation activities<sup>260</sup> corroborated desk research, suggesting strong alignment between the challenges highlighted as part of the European Semester and investments under ESF+. Reported challenges to continued alignment included political will and diverging timelines for adopting CSRs and updating ESF+ programming documents. Regarding EaSI, mixed feedback on funding adequacy suggests that rising demand and inflation may require larger EaSI budgets in the future.

### ESF+ continued relevance

Stakeholders interviewed from most Member States and across different stakeholder types strongly held the view that the ESF+ is overall very relevant to national priorities. This was also confirmed by the survey of ESF+ managing authorities, where most respondents considered that each specific objective of the ESF+ responds strategically to the overall/changing policy context, related priorities, and general objectives of the fund to a large extent.

The breadth of the ESF+ intervention logic in terms of its policy priorities, the flexibility accorded to Member States to define the use of the ESF+ under shared management, and the role of the European Semester in ensuring EU funding responds to identified policy priorities were the main factors cited as supporting this relevance throughout all stakeholder consultation activities. Other factors that were cited as important in ensuring continuous relevance included the ability to reprogram based on changing needs, as well as the involvement of a range of stakeholders in the monitoring of ESF+ operations through monitoring committees. Thematic concentrations, particularly on poverty and social exclusion, were also considered highly relevant and important in ensuring that Member States continue to focus on the most deprived in European societies through the ESF+.

Some areas were mentioned by a small number of stakeholders as emerging challenges or priorities which are not sufficiently covered. Housing and homelessness emerged quite strongly as an area in need of increased attention in Member States. Migration, climate change and the green transition, and gender equality were also highlighted by a smaller number of stakeholders, though overall, these were broadly considered to be addressed through the cross-cutting nature of ESF+ objectives overall.

### Monitoring indicators

Stakeholder consultation activities showed a divergence of opinions regarding the relevance of both common and programme-specific indicators for assessing the outputs and results of the ESF+ initiatives. Stakeholders commonly recognised the relevance of

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<sup>260</sup>More than 40 interviewed stakeholders across most Member States (e.g. BG, CZ, DK EE; ES, FI, IE; HR; LU; MT; NL, PL, PT; RO; SE, SI).

the set of common indicators in providing comparable and coherent data on a core set of variables, and their role in allowing aggregations of outputs and results at EU level and comparisons across and within Member States. Many stakeholders nevertheless expressed concerns at the limitations of common results indicators in capturing the specific outcomes and impacts of ESF+ operations, especially considering that such operations typically require time to manifest results. The interviews have also highlighted a concern that focusing on common indicators diverts attention and resources from understanding the specific impacts of programmes and gaining valuable insights from their delivery. According to some stakeholders who participated in the study's focus groups, such impacts are better captured through evaluations using state-of-the-art methods.

### Findings for ESF+ shared management strand

#### Programmes' responsiveness

The majority of managing authorities who expressed an opinion either agreed or strongly agreed with the fact that the new ESF+ and CPR regulations facilitate amendments to programmes in order to help them respond to policy changes (48%, 44 out of 91) and that the programmes are responsive to such changes (66%, 61 out of 91). At the same time, insights from national-level interviews indicated mixed results, with both positive developments and ongoing challenges, on whether the thematic concentration, categories of regions and the mandatory use of dedicated priorities for social innovation and social experimentation are instrumental in addressing needs on the ground.

#### Capacity to respond to emerging needs

On balance, a slight majority of interviewees across all stakeholder types felt that the ESF+ could function as an important crisis response tool, while maintaining its core Cohesion policy objectives, rather than crises being better addressed via a dedicated instrument. Typically, this was related to a positive experience of the usefulness of CRII flexibilities, as well as the existing delivery infrastructure that the ESF+ offers.

Amongst the slight minority arguing for a dedicated response tool, using the ESF+ as an immediate crisis response solution was felt to divert attention from its core and ultimate cohesion objectives. It was also noted that the ESF+ is not designed for rapid response, but rather for strategically planned, longer-term implementation. Finally, a small minority of stakeholders felt that ESF+ does not have the level of flexibility needed for rapid crisis response.

### Findings for ESF+ EaSI strand

#### EaSI strand internal coherence and relevance to policy priorities

Overall, stakeholder consultations revealed that the EaSI strand showed stronger internal coherence and greater relevance to policy priorities compared to the previous programming period. Consulted European Commission officials indicated that merging the three previous axes of the EaSI programme (PROGRESS, EURES, Microfinance and Social Entrepreneurship) under the EaSI strand, reduces management rigidities and provides the Commission with more flexibility to adapt the programme in view of changing policy priorities.

#### Stakeholder participation

Overall, there is a good level of stakeholder participation in the EaSI strand. Interviewed EU-level NGOs and social partners, involved in the consultation process for the EaSI Annual Work Programmes as per the ESF+ Article 39(8), expressed positive feedback about their interaction with the European Commission and their ability to voice their

opinions. Moving forward, some of these stakeholders suggested that having a shared calendar for the ESF+ Committee and its Technical Working Groups was a means to help stakeholders better plan for the relevant meetings. Some stakeholders in the focus groups also emphasised the need to brainstorm together with the European Commission to define EaSI's Annual Work Programmes.

**ANNEX VI. SUPPORTING INFORMATION**

**Table A – Number of programmes and allocation of funds, by type of resources**

MS	Regional Programmes	National programmes	Total no. of programmes	EU resources	National resources	Total allocated
AT		2	2	409 668 103.00	554 132 213.00	963 800 316.00
BE	4	1	5	1 327 624 388.01	1 567 436 901.10	2 895 061 289.11
BG		3	3	2 625 192 711.00	517 739 143.98	3 142 931 854.98
CY		1	1	222 205 180.00	132 551 993.00	354 757 173.00
CZ		2	2	2 430 902 368.00	726 695 498.03	3 157 597 866.03
DE	16	1	17	6 562 556 905.10	6 822 371 307.31	13 384 928 212.41
DK		1	1	119 616 872.00	143 245 350.02	262 862 222.02
EE		1	1	534 157 337.00	224 607 533.06	758 764 870.06
EL	13	4	17	5 560 449 773.00	1 485 609 929.01	7 046 059 702.01
ES	19	4	23	11 295 696 991.02	5 245 596 232.10	16 541 293 223.12
FI	1	1	2	604 674 882.95	407 164 948.99	1 011 839 831.94
FR	17	2	19	6 674 708 658.15	4 333 696 914.94	11 008 405 573.09
HR		1	1	1 933 570 912.00	334 395 253.02	2 267 966 165.02
HU		5	5	5 298 665 303.00	1 022 532 603.07	6 321 197 906.07
IE		1	1	508 380 024.02	572 629 972.08	1 081 009 996.10
IT	21	6	27	14 808 620 616.00	13 831 320 754.26	28 639 941 370.26
LT		2	2	1 136 397 404.98	262 090 838.06	1 398 488 243.04
LU		1	1	15 541 177.00	20 811 923.99	36 353 100.99
LV		2	2	720 968 137.00	125 103 007.04	846 071 144.04
MT		1	1	124 421 656.00	80 447 771.02	204 869 427.02
NL		1	1	413 757 775.99	574 021 800.04	987 779 576.03
PL	16	2	18	12 912 994 435.00	2 684 389 659.30	15 597 384 094.30

PT	8	1	9	7 776 520 960.00	1 596 374 224.19	9 372 895 184.19
RO		4	4	7 332 965 756.00	2 000 335 322.05	9 333 301 078.05
SE		1	1	706 698 560.00	918 877 490.01	1 625 576 050.01
SI		2	2	665 364 994.96	311 102 280.00	976 467 274.96
SK		1	1	2 356 298 319.00	478 953 100.96	2 835 251 419.96
<b>TOTAL</b>	<b>115</b>	<b>54</b>	<b>169</b>	<b>95 078 620 200.18</b>	<b>46 974 233 963.63</b>	<b>142 052 854 163.81</b>

Source: SFC monitoring data, retrieved in February 2024.

**Table B – Share of ESF+ shared management allocations per Specific Objectives (allocations higher than 20% marked green and over 30% red)**

MS	SO(a)	SO(b)	SO(c)	SO(d)	SO(e)	SO(f)	SO(g)	SO(h)	SO(i)	SO(j)	SO(k)	SO(l)	SO(m)	Total
AT	-	-	7.7%	2.3%	-	35.2%	21.5%	31.3%	-	-	-	-	1.9%	100.0%
BE	18.1%	1.9%	-	3.5%	-	9.6%	30.8%	32.0%	-	-	1.1%	1.0%	2.0%	100.0%
BG	26.2%	2.5%	0.8%	3.3%	19.9%	6.7%	8.9%	4.5%	-	4.9%	15.6%	-	6.6%	100.0%
CY	18.0%	9.9%	3.0%	-	22.4%	-	-	3.3%	-	-	37.8%	-	5.6%	100.0%
CZ	15.8%	1.2%	6.2%	7.8%	15.7%	18.5%	1.2%	18.1%	-	5.5%	7.2%	-	2.7%	100.0%
DE	5.0%	-	3.2%	23.0%	3.7%	19.8%	9.9%	26.3%	1.8%	-	0.2%	7.1%	-	100.0%
DK	-	-	-	-	24.5%	9.0%	39.7%	25.2%	-	-	-	1.5%	-	100.0%
EE	10.4%	-	-	7.5%	25.9%	5.8%	16.1%	22.6%	-	-	9.4%	-	2.4%	100.0%
EL	32.4%	0.8%	2.1%	5.8%	9.7%	10.2%	4.1%	4.3%	1.9%	0.7%	19.3%	2.8%	5.9%	100.0%
ES	35.6%	0.3%	0.9%	4.8%	7.9%	13.1%	0.9%	22.4%	1.1%	0.9%	2.7%	5.6%	3.8%	100.0%
FI	32.8%	-	-	-	-	-	32.8%	31.0%	-	-	-	-	3.3%	100.0%
FR	22.6%	-	0.4%	0.3%	2.6%	7.0%	25.6%	28.8%	-	-	1.0%	5.6%	6.2%	100.0%
HR	30.1%	2.8%	-	-	5.2%	25.2%	1.6%	7.7%	0.4%	0.9%	22.9%	-	3.3%	100.0%
HU	15.3%	-	0.6%	5.0%	40.6%	5.5%	5.0%	13.0%	-	1.7%	4.1%	6.4%	2.8%	100.0%
IE	17.7%	-	-	-	-	11.4%	16.2%	19.1%	-	-	-	32.3%	3.3%	100.0%
IT	24.9%	2.6%	4.6%	5.6%	2.7%	20.9%	4.3%	8.2%	0.5%	0.1%	19.1%	3.4%	3.0%	100.0%
LT	23.8%	-	-	-	7.6%	11.5%	6.0%	6.5%	-	-	38.3%	-	6.3%	100.0%
LU	38.4%	-	-	-	10.3%	6.1%	12.5%	28.5%	-	-	-	-	4.1%	100.0%
LV	18.8%	-	-	-	21.8%	6.8%	7.5%	4.1%	-	-	20.3%	16.5%	4.3%	100.0%
MT	18.4%	-	2.6%	-	-	35.8%	10.4%	14.0%	0.8%	-	15.4%	-	2.6%	100.0%
NL	34.8%	-	0.6%	-	-	-	27.3%	35.4%	-	-	0.1%	-	1.8%	100.0%

PL	14.1%	0.5%	6.9%	9.0%	6.0%	16.8%	10.2%	10.7%	2.1%	-	15.7%	4.2%	3.8%	100.0%
PT	15.0%	-	0,5%	8,5%		30.6%	10.9%	13.7%	-	-	18.0%	-	2.8%	100.0%
RO	21.8%	4.3%	1.4%	1.0%	7.1%	10.2%	6.9%	0.6%	0.4%	0.8%	32.2%	1.9%	11.5%	100.0%
SE	15.2%	7.1%	-	-	-	-	28.1%	42.7%	5.4%	-	-	1.4%	-	100.0%
SI	20.6%	3.9%	-	5.0%	23.2%	-	11.0%	5.5%	-	-	17.5%	10.0%	3.3%	100.0%
SK	27.9%	1.8%	2.8%	5.7%	6.4%	10.5%	3.8%	7.3%	0.7%	7.5%	10.6%	12.1%	2.8%	100.0%
MS with highest share of ESF+ allocated to the SO	LU	CY	AT	DE	HU	MT	DK	SE	SE	SK	LT	IE	RO	/
MS with no allocation	AT, DK	AT, DE, DK, EE, FI, FR, HU, IE, LT, LU, LV, MT, NL, PT	BE, DK, EE, FI, HR, HU, IE, LT, LU, LV, SE, SI	CY, DK, FI, HR, IE, LT, LU, LV, MT, NL, SE	AT, BE, FI, IE, MT, NL, PT, SE	CY, FI, NL, SE, SI	CY	-	AT, BE, BG, CY, CZ, DK, EE, FI, FR, HU, IE, LT, LU, LV, NL, PT, SI	AT, BE, CY, DE, DK, EE, FI, FR, IE, LT, LU, LV, MT, NL, PL, PT, SE, SI	AT, DK, FI, IE, LU, SE	AT, BG, CY, CZ, EE, FI, HR, LU, SE	DE, DK, SE	/
<b>Total</b>	<b>21.4%</b>	<b>1.3%</b>	<b>2.6%</b>	<b>6.5%</b>	<b>7.0%</b>	<b>15.4%</b>	<b>9.0%</b>	<b>15.2%</b>	<b>0.8%</b>	<b>0.7%</b>	<b>12.1%</b>	<b>4.2%</b>	<b>3.8%</b>	<b>100.0%</b>

Source: SFC monitoring data, retrieved in February 2024. The highest shares per country are marked in green (above 20%) and red (above 30%).

**Table C – Expenditure at the end of 2024 on total allocation**

MS	Eligible expenditure	Total amount	% of expenditure
AT	7 769 713	963 800 316	0.8%
BE	58 431 265	2 895 061 289	2%
BG	275 537 904	3 142 931 855	8.8%
CY	38 160 076	354 757 173	10.8%
CZ	574 285 051	3 157 597 866	18.2%
DE	1 551 108 064	13 384 928 211	11.6%
DK	33 091 365	262 862 221	12.6%
EE	57 348 866	758 764 870	7.6%
EL	854 815 993	7 046 059 701	12.1%
ES	-	16 541 293 223	0%
FI	64 380 608	1 011 839 831	6.4%

FR	1 313 598 221	11 008 405 573	11.9%
HR	64 832 012	2 267 966 165	2.9%
HU	740 234 139	6 321 197 906	11.7%
IE	249 218 277	1 081 009 996	23.1%
IT	1 361 526 782	28 639 941 370	4.8%
LT	85 552 505	1 398 488 243	6.1%
LU	3 811 845	36 353 101	10.5%
LV	30 550 775	846 071 143	3.6%
MT	7 586 290	204 869 427	3.7%
NL	191 250 945	987 779 575	19.4%
PL	824 136 975	15 597 384 094	5.3%
PT	1 159 716 472	9 372 895 183	12.4%
RO	598 876 524	9 333 301 078	6.4%
SE	246 413 154	1 625 576 050	15.2%
SI	20 112 875	976 467 274	2.1%
SK	387 242 111	2 835 251 420	13.7%
<b>Total</b>	<b>10 799 588 804</b>	<b>142 052 854 164</b>	<b>7.6%</b>

Source: SFC data, retrieved June 2024 for allocations, end-2024 data retrieved in May 2025 for expenditure.

**Table D – Financial implementation of the ESF+ shared management at the end of 2024, by Specific Objective**

Specific Objective	Total spend	Total amount	% of expenditure
SO(a)	1 906 838 651	29 581 400 136	6.4%
SO(b)	62 442 836	1 736 186 427	3.6%
SO(c)	100 649 605	3 628 910 248	2.8%
SO(d)	421 492 293	9 053 313 123	4.7%
SO(e)	886 418 522	9 461 850 691	9.4%
SO(f)	2 201 625 832	21 466 269 026	10.3%
SO(g)	583 871 399	12 432 454 178	4.7%
SO(h)	1 682 111 690	20 945 831 979	8.0%

SO(i)	87 082 406	1 171 163 841	7.4%
SO(j)	43 495 643	947 111 891	4.6%
SO(k)	1 374 396 757	16 739 995 960	8.2%
SO(l)	354 519 261	5 772 356 416	6.1%
SO(m)	720 793 895	5 312 477 696	13.6%
Technical Assistance	373 850 015	3 803 532 552	9.8%
<b>Total</b>	<b>10 799 588 805</b>	<b>142 052 854 164</b>	<b>7.6%</b>

Source: SFC data, retrieved June 2024 for allocations, end-2024 data retrieved in May 2025 for expenditure.

**Table E – Participants across shared management strand Specific Objectives (SOs) and Member States (MS)**

MS	SO(a)	SO(b)	SO(c)	SO(d)	SO(e)	SO(f)	SO(g)	SO(h)	SO(i)	SO(j)	SO(k)	Total 1 (a-k)	SO(l)	Total 2 (a-l)	SO(l)*
AT	0	0	625	0	0	3 356	6 326	8 760	0	0	0	<b>19 067</b>	0	<b>19 067</b>	0
BE	77 614	0	0	0	0	39 480	98 453	78 319	0	0	1 750	<b>295 616</b>	2 697	<b>298 313</b>	0
BG	22 286	1 716	2 122	1 682	0	46 673	363	1 294	0	6 710	60 667	<b>143 513</b>	0	<b>143 513</b>	0
CY	5 773	0	0	0	0	0	0	0	0	0	0	<b>5 773</b>	0	<b>5 773</b>	0
CZ	18 386	22	1 764	2 940	2 263	6 807	0	27 581	0	468	3 999	<b>64 230</b>	0	<b>64 230</b>	0
DE	20 212	0	33 989	54 135	49 170	242 213	130 395	140 035	27 789	0	0	<b>697 938</b>	20 579	<b>718 517</b>	62 260
DK	0	0	0	0	6 680	2 688	5 190	1 350	0	0	0	<b>15 908</b>	431	<b>16 339</b>	431
EE	2 898	0	0	93	0	0	1 121	1 685	0	0	1 332	<b>7 129</b>	0	<b>7 129</b>	0
EL	2 667	0	0	1 922	44 252	2 888	1 342	0	0	0	0	<b>53 071</b>	0	<b>53 071</b>	0
ES	463 849	0	28 552	273 470	125 743	190 671	4 746	421 119	81 822	22 576	20 855	<b>1 633 403</b>	57 395	<b>1 690 798</b>	136
FI	11 842	0	0	0	0	0	15 322	8 655	0	0	0	<b>35 819</b>	0	<b>35 819</b>	0
FR	185 198	0	174	117	126	70 797	94 967	697 557	0	0	0	<b>1 048 936</b>	29 136	<b>1 078 072</b>	0

MS	SO(a)	SO(b)	SO(c)	SO(d)	SO(e)	SO(f)	SO(g)	SO(h)	SO(i)	SO(j)	SO(k)	Total 1 (a-k)	SO(l)	Total 2 (a-l)	SO(l)*
HR	0	0	0	0	0	4 880	0	0	0	0	28 944	<b>33 824</b>	0	<b>33 824</b>	0
HU	19 780	0	0	39 490	136 293	4 485	0	65	0	1 116	0	<b>201 229</b>	0	<b>201 229</b>	0
IE	543	0	0	0	0	0	77 552	54 060	0	0	0	<b>132 155</b>	8 793	<b>140 948</b>	0
IT	365 452	0	85 912	84 881	10 912	1 050 473	68 985	90 555	3 360	0	147 780	<b>1 908 310</b>	13 004	<b>1 921 314</b>	5 998
LT	19 469	0	0	0	1 730	0	0	793	0	0	41 884	<b>63 876</b>	0	<b>63 876</b>	0
LU	645	0	0	0	491	0	4 107	3 777	0	0	0	<b>9 020</b>	0	<b>9 020</b>	0
LV	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>	1 119	<b>1 119</b>	0
MT	1 484	0	0	0	0	603	3 683	0	0	0	0	<b>5 770</b>	0	<b>5 770</b>	0
NL	128 371	0	0	0	0	0	0	52 663	0	0	0	<b>181 034</b>	0	<b>181 034</b>	0
PL	134 610	173	1 663	24 435	9 446	108 917	28 921	10 086	6 412	0	22 903	<b>347 566</b>	15 438	<b>363 004</b>	6 890
PT	27 863	0	0	8	0	125 575	108 696	15 654	0	0	183 593	<b>461 389</b>	0	<b>461 389</b>	0
RO	0	0	0	0	0	0	0	0	0	0	0	<b>0</b>	0	<b>0</b>	0
SE	62 973	0	0	0	0	0	37 975	15 869	120	0	0	<b>116 937</b>	299	<b>117 236</b>	6 935
SI	4 549	0	0	0	0	0	13 838	1 301	0	0	0	<b>19 688</b>	0	<b>19 688</b>	0
SK	116 814	45	0	6 181	980	390	0	2 095	0	16 596	7 134	<b>150 235</b>	723	<b>150 958</b>	0
<b>Total</b>	<b>1 693 278</b>	<b>1 956</b>	<b>154 801</b>	<b>489 354</b>	<b>388 086</b>	<b>1 900 896</b>	<b>701 982</b>	<b>1 633 273</b>	<b>119 503</b>	<b>47 466</b>	<b>520 841</b>	<b>7 651 436</b>	<b>149 614</b>	<b>7 801 050</b>	<b>82 650</b>

Source: SFC data, retrieved in May 2025.

\* Participants under SO(l) operations targeting the most deprived

**Table F – Overview of short-term and longer-term results by country**

	Short-term indicators					Longer-term indicators*		
	Participants engaged in job searching upon leaving	Participants in education or training upon leaving	Participants gaining a qualification upon leaving	Participants in employment upon leaving	Success rate (positive results as % of participants)	Participants in employment six months after leaving	Participants with an improved labour market situation six months after leaving	
AT	543	819	3 591	1 643	34.6	0	0	
BE	3 446	26 593	11 702	13 946	18.7	2 205	0	
BG	16 353	11	1 770	401	12.9	0	0	
CY	0	734	0	3 922	80.7	2 730	0	
CZ	0	1 055	6 421	0	11.6	0	0	
DE	8 058	37 584	274 818	38 807	50.0	6 397	6 010	
DK	271	3 384	414	682	29.1	0	0	
EE	59	403	169	298	13.0	249	2	
EL	310	674	2 922	5 599	17.9	373	525	
ES	32 508	105 817	355 298	426 109	54.4	81 319	9 581	
FI	141	690	470	1 227	7.1	0	0	
FR	32 103	89 259	102 856	207 514	40.0	99 848	21 020	
HR	30	0	284	1	0.9	0	0	
HU	3	29	19 001	207	9.6	2	300	
IE	2 244	4 577	9 689	8 836	18.0	2 538	1 010	
IT	3 466	230	149 150	16 279	8.8	24 359	3 719	
LT	219	25	6 028	8 518	23.2	11 647	0	
LU	14	491	2 208	140	31.6	63	1 989	
LV	0	0	0	0	0.0	0	0	
MT	34	163	748	247	20.7	171	0	
NL	207	0	680	6 330	4.0	1 228	1 512	
PL	73	404	53 921	91 495	40.2	0	0	
PT	21 134	113 485	60 247	12 548	45.0	0	0	

RO	-	-	-	-	-	-	-
SE	143	2 486	8 594	12 588	20.3	10 116	0
SI	330	134	350	387	6.1	28	0
SK	1	4	1 045	17	0.7	11	1
<b>Total</b>	<b>121 690</b>	<b>389 051</b>	<b>1 072 376</b>	<b>857 741</b>	<b>31.3</b>	<b>243 284</b>	<b>45 669</b>

Source: SFC data, retrieved in May 2025. Note: \*Common longer-term result indicators are to be reported, as a minimum requirement, twice in the programming period: by 31 January 2026 and in the final performance report. The currently available data are therefore not representative.

**Table G – Overview of short-term and longer-term results by specific objective**

	Short-term indicators					Longer-term indicators*	
	Participants engaged in job searching upon leaving	Participants in education or training upon leaving	Participants gaining a qualification upon leaving	Participants in employment upon leaving	Success rate (positive results as % of participants)	Participants in employment six months after leaving	Participants with an improved labour market situation six months after leaving
ESO4.1	31 761	41 273	116 491	365 522	32.8	73 118	6 083
ESO4.2	0	0	37	0	1.9	0	0
ESO4.3	1 184	4 477	4 363	6 377	10.6	1 561	545
ESO4.4	280	32 279	91 557	134 111	52.8	24 397	3 819
ESO4.5	951	7 034	113 244	9 600	33.7	3 004	3 289
ESO4.6	20 930	72 984	360 551	28 431	25.4	12 703	1 587
ESO4.7	5 227	34 224	177 774	27 255	34.8	23 074	20 388
ESO4.8	46 759	80 699	162 674	264 094	33.9	96 139	8 890
ESO4.9	5 994	6 830	14 276	15 206	35.4	6 973	527
ESO4.10	1 703	2 033	3 125	1 934	18.5	773	201
ESO4.11	6 901	107 218	28 284	5 211	28.3	1 542	340
ESO4.12	0	0	0	0	0.0	0	0
<b>Total</b>	<b>121 690</b>	<b>389 051</b>	<b>1 072 376</b>	<b>857 741</b>	<b>31.3</b>	<b>243 284</b>	<b>45 669</b>

Source: SFC data, retrieved in May 2025. Note: \*Common longer-term result indicators are to be reported, as a minimum requirement, twice in the programming period: by 31 January 2026 and in the final performance report. The currently available data are therefore not representative.

**Table H – Main priorities and calls launched under EaSI strand in 2021 - 2024**

Annual Work Programme	Priorities	Calls
<b>2021</b>	<ul style="list-style-type: none"> <li>- Implement the European Pillar of Social Rights</li> <li>- Strengthen employment and skills</li> <li>- Improve social protection and inclusion</li> <li>- Improve labour markets and labour mobility</li> <li>- Foster safe and fair working conditions</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">National Contact Points for the Employment and Social Innovation (EaSI) strand of ESF+</a></li> <li>- <a href="#">Framework Partnership agreement under ESF-OG-2021 Social Enterprise</a></li> <li>- <a href="#">Framework partnership agreement under ESF-OG-2021 - social inclusion</a></li> <li>- <a href="#">Specific Grant Agreement under FPA-ESF-OG-2021 - Social Inclusion</a></li> <li>- <a href="#">Specific Grant Agreement under FPA ESF-OG-2021 Social Enterprise</a></li> <li>- <a href="#">EURES EEA non EU countries cooperation</a></li> <li>- <a href="#">EURES Social Partner Cooperation</a></li> <li>- <a href="#">EURES Cross Border Partnerships</a></li> <li>- <a href="#">Posting of Workers</a></li> <li>- <a href="#">EURES TARGETED MOBILITY SCHEME (TMS)</a></li> <li>- <a href="#">Activities to tackle undeclared work</a></li> </ul>
<b>2022</b>	<ul style="list-style-type: none"> <li>- Implement the European Pillar of Social Rights</li> <li>- Support and foster an inclusive recovery from COVID-19 pandemic impacts</li> <li>- Promote fair transitions (green, digital)</li> <li>- Address labour shortages and skills mismatches</li> <li>- Improve social protection systems and access to services</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">ESF-2022-SOC-FIN</a> National Contact Points for the Employment and Social Innovation (EaSI) strand of ESF+</li> <li>- <a href="#">Transaction costs to support social finance intermediaries (ESF-2022-SOC-FIN)</a></li> <li>- <a href="#">Social innovations for a fair green and digital transition (ESF-2022-SOC-INNOV)</a></li> <li>- <a href="#">EURES Targeted Mobility Scheme (ESF-2022-EURES-TMS)</a></li> <li>- <a href="#">European Mobility and Social Inclusion for Integrating Disadvantaged Young People Not in Employment, Education, or Training (NEETs) (ESF-SI-2022-ALMA-01; ESFA/ Social Innovation Plus Initiative)</a></li> </ul>
<b>2023</b>	<ul style="list-style-type: none"> <li>- Implement European Pillar of Social Rights</li> <li>- Support just green and digital transitions</li> <li>- Address labour shortages and skills needs</li> <li>- Improve social protection and inclusion</li> <li>- Promote fair labour mobility</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">EURES Cross-border partnerships</a></li> <li>- <a href="#">Activities to tackle undeclared work (Topic 2)</a></li> <li>- <a href="#">EURES EEA non-EU countries cooperation</a></li> <li>- <a href="#">EURES Social partners cooperation</a></li> <li>- <a href="#">Posting of workers: enhancing administrative cooperation and access to information (Topic 1)</a></li> </ul>

		<ul style="list-style-type: none"> <li>- <a href="#">Implementation of a European Tracking Service for pensions</a></li> <li>- <a href="#">Support to the European Platform on Combatting Homelessness</a></li> <li>- <a href="#">Social innovation practices to combat homelessness</a></li> <li>- <a href="#">Actions to boost the development of finance markets for social enterprises</a></li> <li>- <a href="#">National Competence Centres for Social Innovation: Building-up and Consolidating the Capacity</a> (ESF-SI-2023-NCC-01; ESFA/Social Innovation Plus Initiative)</li> <li>- <a href="#">Social Innovations for the Upskilling of Vulnerable Youth, Especially Young People not in Employment, Education, or Training (NEETs)</a> (ESF-SI-2023-SKILLS-01; ESFA/Social Innovation Plus Initiative)</li> </ul>
2024	<ul style="list-style-type: none"> <li>- Implement European Pillar of Social Rights</li> <li>- Strengthen employment and ensure fair labour mobility as well as safe and fair working conditions.</li> <li>- Foster education and skills</li> <li>- Help improve social protection and inclusion</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">EURES Targeted Mobility Scheme (TMS)</a></li> <li>- <a href="#">Social innovation call for proposals: actions to develop impact performance intelligence services for the social impact investing market actors</a></li> <li>- <a href="#">Innovative Approaches to Mitigate the Societal Consequences of Russia's War of Aggression against Ukraine within EU Countries</a> (ESF-SI-2024-UA-01; ESFA/Social Innovation Plus Initiative)</li> <li>- <a href="#">Innovative Approaches Tackling Long-Term Unemployment</a> ( ESF-SI-2024-LTU-01; ESFA/Social Innovation Plus Initiative)</li> </ul>

Source: [EU Funding & Tenders Portal](#) and [Social Innovation Plus Initiative & Transnational calls](#)

**Table I – Top beneficiary countries contracted amount under EaSI direct and indirect management in 2021 - 2024**

<b>Beneficiary country</b>	<b>Beneficiary's contracted amount EUR million</b>
Lithuania	101,65
Belgium	63,79
Germany	37,91
Luxembourg	18,05
Spain	11,22
Hungary	10,20
France	9,62
Italy	3,94
Netherlands	0,50
Ireland	0,42

Austria	0,36
Czech Republic	0,07

Source: Financial Transparency System, direct and indirect management (downloaded on 14/07/2025)

Table I indicates the distribution of budget commitments per beneficiary Member State. The estimated amount per country sums up the total amounts received by all the recipients residing in the particular country for which information is publicly disclosed.

Table J – Calls for proposals launched under Social Innovation Plus Initiative

## Transnational Calls 2022–2025

Call title	Budget	Call announced	Deadline	Projects received	Projects funded	Grant amount	State of play 2024 December
ALMA (Aim-Learn-Master-Achieve)	11,6 MEUR	15.12.2022	15.03.2023	34	29	11,6 MEUR	14 final reports are being checked, projects finalise their activities. Closing event planned for Dec 2025, Brussels, Belgium
National Competence Centres for SocialInnovation: Building-up and Consolidating the Capacity	8,7 MEUR	17.08.2023	18.12.2023	5	5	8,7 MEUR	Projects finished 1st year of implementation, actions under NCC working group objectives, meetings are taking place. Mutual learning onsite event planned for September (Malme, Sweden) 2025
Social Innovations for the Upskilling of Vulnerable Youth, Especially Young People not in Employment, Education, or Training (NEETs)	10,3 MEUR	10.11.2023	27.03.2024	108 (60 MEUR)	22	10,3 MEUR	Projects finished 8 months of implementation, will last for 2 years. Mutual learning onsite event held in March (Bologna, Italy) 2025.
Innovative Approaches to Mitigate the Societal Consequences of Russia's War of Aggression Against Ukraine within EU MS	22 MEUR	24.01.2024	30.05.2024	102 (55 MEUR)	42 (pre-selected)	21,8 MEUR	38 Grant Agreements signed and projects started in April/June, 2025. Will last for 1,5 years. Mutual learning onsite event held in April (Warsaw, Poland) 2025.
Innovative Approaches Tackling Long-Term Unemployment	23 MEUR	18.04.2024	30.09.2024	76 (167 MEUR)	9 (pre-selected)	22,6 MEUR	5 Grant Agreements signed and projects started in June, 2025. Will last for 3 years. Mutual learning onsite event planned for September (Nantes, France) 2025.
Implementing the Disability Employment Package – Innovative Approaches to Improve Labour Market Outcomes for Persons With Disabilities	10 MEUR	3.06.2025	30.10.2025				

Source: DG EMPL

**Table K – EU amount allocated in 2021 – 2027 to social innovation and number of programmes/priorities, by country**

	<b>N. progr.</b>	<b>N. priorities</b>	<b>EU amount Social innovation</b>	<b>EU amount Shared management</b>	<b>% EU amount on Total Shared Management</b>	<b>Total amount Social Innovation</b>	<b>Total amount Shared Management</b>	<b>% Tot amount on Total Shared Management</b>
AT	1	1	13 870 990	409 668 103	3.4	14 601 043	963 800 316	1.5
BE	3	3	91 543 541	1 327 624 388	6.9	169 193 335	2 895 061 289	5.8
BG	1	1	9 714 696	2 625 192 711	0.4	10 225 996	3 142 931 855	0.3
CY	1	1	10 000 000	222 205 180	4.5	10 526 316	354 757 173	3.0
CZ	1	1	36 463 536	2 430 902 368	1.5	38 382 671	3 157 597 866	1.2
DE	8	8	245 378 515	6 562 556 905	3.7	288 366 396	13 384 928 212	2.1
DK	1	1	359 024	119 616 872	0.3	377 921	262 862 222	0.2
EE	1	1	5 200 000	534 157 337	1.0	7 428 572	758 764 870	1.0
EL	1	1	23 750 000	5 560 449 773	0.4	25 000 000	7 046 059 702	0.4
ES	7	7	144 677 253	11 295 696 991	1.3	152 291 849	16 541 293 223	0.9
FI	1	1	30 120 795	604 674 883	5.0	31 706 101	1 011 839 832	3.1
FR	2	2	200 651 662	6 674 708 658	3.0	211 940 552	11 008 405 573	1.9
HR	1	1	19 528 912	1 933 570 912	1.0	20 556 751	2 267 966 165	0.9

	<b>N. progr.</b>	<b>N. priorities</b>	<b>EU amount Social innovation</b>	<b>EU amount Shared management</b>	<b>% EU amount on Total Shared Management</b>	<b>Total amount Social Innovation</b>	<b>Total amount Shared Management</b>	<b>% Tot amount on Total Shared Management</b>
HU	1	1	178 977 279	5 298 665 303	3.4	188 397 136	6 321 197 906	3.0
IE	1	1	25 419 000	508 380 024	5.0	26 756 843	1 081 009 996	2.5
IT	2	2	106 731 462	14 808 620 616	0.7	135 243 645	28 639 941 370	0.5
LT	1	1	53 335 038	1 136 397 405	4.7	56 142 146	1 398 488 243	4.0
LU	1	1	699 353	15 541 177	4.5	999 076	36 353 101	2.7
LV	1	1	22 100 000	720 968 137	3.1	26 000 000	846 071 144	3.1
MT	1	1	2 400 000	124 421 656	1.9	4 000 000	204 869 427	1.9
NL	1	1	16 435 346	413 757 776	4.0	17 300 383	987 779 576	1.7
PL	1	1	194 325 581	12 912 994 435	1.5	204 553 244	15 597 384 094	1.3
PT	1	1	5 000 000	7 776 520 960	0.1	5 882 353	9 372 895 184	0.1
RO	1	1	15 000 000	7 332 965 756	0.2	17 483 369	9 333 301 078	0.2
SE	1	1	35 334 928	706 698 560	5.0	37 194 662	1 625 576 050	2.3
SI	1	1	9 260 000	665 364 995	1.4	12 123 824	976 467 274	1.2
SK	1	1	68 153 000	2 356 298 319	2.9	71 740 002	2 835 251 420	2.5

	N. progr.	N. priorities	EU amount Social innovation	EU amount Shared management	% EU amount on Total Shared Management	Total amount Social Innovation	Total amount Shared Management	% Tot amount on Total Shared Management
<b>Total</b>	<b>41</b>	<b>41</b>	<b>1 530 669 911</b>	<b>95 078 620 200</b>	<b>1.6</b>	<b>1 784 414 186</b>	<b>142 052 854 163</b>	<b>1.2</b>

Source: Cohesion data.

**Table L – Budget allocation for FEAD, REACT-EU and material deprivation and social inclusion (ESF+)**

MS	2014-2020			2021-2027			Difference between 2014-2020 and 2021-2027	
	FEAD	REACT-EU	FEAD + REACT-EU	SO(l) (ESF+)	SO(m) (ESF+)	SO(l) + SO(m)	Δ FEAD - ESF+	Δ FEAD + REACT EU - ESF+
AT	18 032 733	6 000 000	24 032 733		16 796 392	16 796 392	-6.86%	-30.11%
BE	73 821 504	46 087 224	119 908 728		53 110 536	53 110 536	-28.06%	-55.71%
BG	104 815 264	38 564 594	143 379 858		180 000 000	180 000 000	71.73%	25.54%
CY	3 944 660	-	3 944 660		17 000 000	17 000 000	330.96%	330.96%
CZ	23 329 849	3 889 688	27 219 537		72 927 000	72 927 000	212.59%	167.92%
DE	78 893 211	-	78 893 211	198 640 000		198 640 000	151.78%	151.78%
DK	3 944 660	-	3 944 660	3 441 384		3 441 384	-12.76%	-12.76%
EE	8 002 026	4 500 000	12 502 026		16 236 632	16 236 632	102.91%	29.87%
ES	563 410 224	177 000 000	740 410 224		565 083 719	565 083 719	0.30%	-23.68%
FI	22 540 916	-	22 540 916		30 233 745	30 233 745	34.13%	34.13%
FR	499 281 315	104 027 508	603 308 823		612 640 979	612 640 979	22.70%	1.55%

MS	2014-2020			2021-2027			Difference between 2014-2020 and 2021-2027	
	FEAD	REACT-EU	FEAD + REACT-EU	SO(l) (ESF+)	SO(m) (ESF+)	SO(l) + SO(m)	Δ FEAD - ESF+	Δ FEAD + REACT EU - ESF+
EL	280 972 531	-	280 972 531		360 000 000	360 000 000	28.13%	28.13%
HR	36 628 990	10 000 000 00	46 628 990		67 392 000	67 392 000	83.99%	44.53%
HU	93 882 921	-	93 882 921		153 012 972	153 012 972	62.98%	62.98%
IE	22 766 327	-	22 766 327		32 149 801	32 149 801	41.22%	41.22%
IT	670 592 285	199 380 000	869 972 285		746 999 998	746 999 998	11.39%	-14.14%
LT	77 202 641	-	77 202 641		79 547 814	79 547 814	3.04%	3.04%
LU	3 944 660	850 000	4 794 660		1 260 389	1 260 389	-68.05%	-73.71%
LV	41 024 469	7 931 641	48 956 110		32 538 000	32 538 000	-20.69%	-33.54%
MT	3 944 660	-	3 944 660		4 500 000	4 500 000	14.08%	14.08%
NL	3 944 660	-	3 944 660		16 435 346	16 435 346	316.65%	316.65%
PL	473 359 260	-	473 359 260		506 375 000	506 375 000	6.97%	6.97%
PT	176 946 201	-	176 946 201		230 688 335	230 688 335	30.37%	30.37%
RO	441 013 044	56 000 000	497 013 044		887 540 126	887 540 126	101.25%	78.57%
SE	7 889 321	-	7 889 321	21 200 958		21 200 958	168.73%	168.73%
SI	20 512 235	8 900 000	29 412 235		29 400 000	29 400 000	43.33%	-0.04%
SK	55 112 543	22 928 653	78 041 196		68 153 000	68 153 000	23.66%	-12.67%
UK	1 031 459	-	1 031 459	-	-	-		-100.00%

MS	2014-2020			2021-2027			Difference between 2014-2020 and 2021-2027	
	FEAD	REACT-EU	FEAD + REACT-EU	SO(l) (ESF+)	SO(m) (ESF+)	SO(l) + SO(m)	Δ FEAD - ESF+	Δ FEAD + REACT EU - ESF+
EU	3 810 784 569	686 059 308	4 496 843 877	223 282 342 <sup>261</sup>	4 780 021 784	5 003 304 126	31.29%	11.26%

Source: Cohesion data.

**Table M – Budget allocation for ex-FEAD, REACT-EU and material deprivation and social inclusion (ESF+) in real values (base year 2015)**

MS	2014-2020			2021-2027			Difference between 2014-2020 and 2021-2027	
	FEAD (Price Index 2014)	REACT-EU (Price Index 2020)	FEAD + REACT-EU	SO(l) (ESF+) (Price Index 2021)	SO(m) (ESF+) (Price Index 2021)	SO(l) + SO(m)	Δ FEAD - ESF+	Δ FEAD + REACT EU - ESF+
AT	18 178 158	5 531 483	23 709 642	0	15 069 435	15 069 435	-17.1%	-36.4%
BE	74 282 053	42 582 670	116 864 723	0	47 543 224	47 543 224	-36.0%	-59.3%
BG	103 695 354	36 289 258	139 984 612	0	164 684 355	164 684 355	58.8%	17.6%
CY	3 883 686	0	3 883 686	0	16 679 749	16 679 749	329.5%	329.5%
CZ	23 376 602	3 491 641	26 868 243	0	63 359 687	63 359 687	171.0%	135.8%
DE	79 449 356	0	79 449 356	181 904 762	0	181 904 762	129.0%	129.0%

Regarding the SO (l) in the 2021-2027 programming period, only resources addressing the most deprived are considered. To catch the amount directly addressed to most deprived, we used 'Priority Type Description' variable as filter. As set by the Article 2(1)(6) of the ESF+ regulation: 'Most deprived persons' means natural persons, whether individuals, families, household or groups of persons, including children in vulnerable situations and homeless people, whose need for assistance has been established according to the objective criteria which are set by the national competent authorities in consultation with relevant stakeholders avoiding conflicts of interest, and which may include elements that allow for targeting of the most deprived persons in certain geographical areas.

MS	2014-2020			2021-2027			Difference between 2014-2020 and 2021-2027	
	FEAD (Price Index 2014)	REACT-EU (Price Index 2020)	FEAD + REACT-EU	SO(I) (ESF+) (Price Index 2021)	SO(m) (ESF+) (Price Index 2021)	SO(I) + SO(m)	Δ FEAD - ESF+	Δ FEAD + REACT EU - ESF+
DK	3 952 565	0	3 952 565	3 280 633	0	3 280 633	-17.0%	-17.0%
EE	8 007 631	4 098 361	12 105 992	0	14 153 271	14 153 271	76.7%	16.9%
ES	559 882 961	170 339 717	730 222 678	0	527 918 273	527 918 273	-5.7%	-27.7%
FI	22 504 908	0	22 504 908	0	28 490 148	28 490 148	26.6%	26.6%
FR	499 731 073	98 604 273	598 335 346	0	568 945 931	568 945 931	13.9%	-4.9%
EL	277 887 974	0	277 887 974	0	353 808 354	353 808 354	27.3%	27.3%
HR	36 534 002	9 703 086	46 237 087	0	63 685 504	63 685 504	74.3%	37.7%
HU	93 939 285	0	93 939 285	0	128 539 123	128 539 123	36.8%	36.8%
IE	22 766 327	0	22 766 327	0	31 032 626	31 032 626	36.3%	36.3%
IT	671 263 549	193 572 816	864 836 364	0	711 428 570	711 428 570	6.0%	-17.7%
LT	76 681 209	0	76 681 209	0	68 723 813	68 723 813	-10.4%	-10.4%
LU	3 947 028	802 417	4 749 445	0	1 149 885	1 149 885	-70.9%	-75.8%
LV	41 110 802	7 302 192	48 412 994	0	29 015 516	29 015 516	-29.4%	-40.1%
MT	3 990 955	0	3 990 955	0	4 200 896	4 200 896	5.3%	5.3%
NL	3 952 961	0	3 952 961	0	14 943 941	14 943 941	278.0%	278.0%
PL	470 068 779	0	470 068 779	0	443 022 747	443 022 747	-5.8%	-5.8%
PT	177 835 378	0	177 835 378	0	220 648 814	220 648 814	24.1%	24.1%
RO	439 212 274	50 600 886	489 813 159	0	770 367 265	770 367 265	75.4%	57.3%
SE	7 944 936	0	7 944 936	19 188 124	0	19 188 124	141.5%	141.5%
SI	20 355 498	8 490 746	28 846 244	0	27 484 341	27 484 341	35.0%	-4.7%

MS	2014-2020			2021-2027			Difference between 2014-2020 and 2021-2027	
	FEAD (Price Index 2014)	REACT-EU (Price Index 2020)	FEAD + REACT-EU	SO(l) (ESF+) (Price Index 2021)	SO(m) (ESF+) (Price Index 2021)	SO(l) + SO(m)	Δ FEAD - ESF+	Δ FEAD + REACT EU - ESF+
SK	54 920 322	21 138 244	76 058 566	0	61 107 325	61 107 325	11.3%	-19.7%
UK	1 031 459	0	1 031 459	n.a.	n.a.	n.a.	n.a.	n.a.
<b>EU</b>	<b>3 800 387 084</b>	<b>652 547 788</b>	<b>4 451 903 413</b>	<b>204 373 519</b>	<b>4 376 002 794</b>	<b>4 580 376 313</b>	<b>20.5%</b>	<b>2.9%</b>

Source: Cohesion data and Eurostat for the Price Index and the population in severe material and social deprivation.

**Table N – Grouping of countries by net increase/decrease in ESF+ shared management allocation for Most Deprived compared to FEAD and changes in the population living in severe material and social deprivation**

Group of countries per net increase/decrease of allocation	Member State	Net increase		Net increase pro capita		Diff. Most Deprived population Δ 2022-2015
		Nominal values	Real values	Nominal values	Real values	Percentage
Net increase both in nominal and real terms	CY	331.0%	329.5%	1080.5%	1076.5%	-63%
	NL	316.6%	278.0%	412.4%	364.9%	-19%
	CZ	212.6%	171.0%	571.2%	482.0%	-53%
	SE	168.7%	141.5%	19.9%	7.7%	124%
	DE	151.8%	129.0%	125.8%	105.3%	12%
	EE	102.9%	76.7%	112.5%	85.1%	-5%
	RO	101.3%	75.4%	193.8%	156.1%	-32%
	HR	84.0%	74.3%	322.7%	300.5%	-56%
	BG	71.7%	58.8%	255.9%	229.1%	-52%

	HU	63.0%	36.8%	339.1%	268.6%	-63%
	SI	43.3%	35.0%	381.1%	353.2%	-70%
	IE	41.2%	36.3%	111.6%	104.2%	-33%
	FI	34.1%	26.6%	-30.4%	-34.3%	93%
	PT	30.4%	24.1%	168.7%	155.7%	-51%
	EL	28.1%	27.3%	68.4%	67.3%	-24%
	SK	23.7%	11.3%	64.5%	48.0%	-25%
	FR	22.7%	13.9%	6.1%	-1.6%	16%
	MT	14.1%	5.3%	61.1%	48.7%	-29%
	IT	11.4%	6.0%	208.5%	193.5%	-64%
<b>Net increase in nominal but not in real terms</b>	PL	7.0%	-5.8%	200.8%	165.0%	-64%
	LT	3.0%	-10.4%	161.0%	127.0%	-61%
	ES	0.3%	-5.7%	-5.6%	-11.3%	6%
<b>Net decrease but due to reduction of the Most Deprived population</b>	AT	-6.9%	-17.1%	12.3%	-0.1%	-17%
	LV	-20.7%	-29.4%	65.8%	47.5%	-52%
<b>Net decrease for other reasons (not explained by reduction of Most Deprived)</b>	DK	-12.8%	-17.0%	-15.9%	-20.0%	4%
	BE	-28.1%	-36.0%	-13.6%	-23.1%	-17%
	LU	-68.0%	-70.9%	-65.2%	-68.2%	-8%

Source: SFC monitoring data, retrieved in February 2024 and Eurostat data, retrieved in February 2024.

**Table O – Overview of thematic concentration allocation for social inclusion, the most deprived and youth employment<sup>262</sup>**

Thematic concentration	Social Inclusion		Most deprived (SO(i)+SO(m))		Youth Employment		Total EU amount (total ESF+ budget by country)
Threshold	25%		3%		12.5% MS above the EU average of NEET between 2017 and 2019		
	Absolute value	% of EU amount	Absolute value	% of EU amount	Absolute value	% of EU amount	Absolute value
AT	132 133 884	32.3%	16 796 392	4.1%		0.0%	409 668 103
BE	438 483 769	33.0%	53 110 536	4.0%	157 218 979	11.8%	1 327 624 388
BG	632 108 841	24.1%	180 000 000	6.9%	315 024 089	12.0%	2 625 192 711
CY	87 205 180	39.2%	17 000 000	7.7%	28 000 000	12.6%	222 205 180
CZ	719 740 981	29.6%	72 927 000	3.0%		0.0%	2 430 902 368
DE	2 410 295 327	36.7%	198 640 000	3.0%		0.0%	6 562 556 905
DK	32 119 529	26.9%	3 441 384	2.9%		0.0%	119 616 872
EE	169 836 964	31.8%	16 236 632	3.0%		0.0%	534 157 337
EL	1 502 158 159	27.0%	360 000 000	6.5%	750 432 550	13.5%	5 560 449 773
ES	3 687 410 098	32.6%	565 083 719	5.0%	2 018 680 296	17.9%	11 295 696 991
FI	192 739 208	31.9%	30 233 745	5.0%		0.0%	604 674 883
FR	2 290 889 360	34.3%	612 640 979	9.2%	1 207 433 674	18.1%	6 674 708 658
HR	616 228 912	31.9%	67 392 000	3.5%	324 844 000	16.8%	1 933 570 912
HU	1 278 224 248	24.1%	153 012 972	2.9%		0.0%	5 298 665 303
IE	256 581 140	50.5%	32 149 801	6.3%		0.0%	508 380 024

<sup>262</sup>Some countries may appear slightly below the thematic concentration thresholds in the table. However, since the differences are small, these small discrepancies may be due to rounding errors.

IT	4 169 449 326	28.2%	746 999 998	5.0%	2 784 688 730	18.8%	14 808 620 616
LT	511 967 471	45.1%	79 547 814	7.0%		0.0%	1 136 397 405
LU	3 885 295	25.0%	1 260 389	8.1%		0.0%	15 541 177
LV	293 031 231	40.6%	32 538 000	4.5%		0.0%	720 968 137
MT	34 860 000	28.0%	4 500 000	3.6%		0.0%	124 421 656
NL	146 363 654	35.4%	16 435 346	4.0%		0.0%	413 757 776
PL	4 038 890 160	31.3%	506 375 000	3.9%		0.0%	12 912 994 435
PT	2 377 904 814	30.6%	230 688 335	3.0%	112 000 000	1.4%	7 776 520 960
RO	2 472 984 450	33.7%	887 540 126	12.1%	879 956 000	12.0%	7 332 965 756
SE	369 030 196	52.2%	21 200 958	3.0%		0.0%	706 698 560
SI	213 076 240	32.0%	29 400 000	4.4%		0.0%	665 364 995
SK	864 002 510	36.7%	68 153 000	2.9%	283 969 292	12.1%	2 356 298 319
<b>Total</b>	<b>29 941 600 947</b>	<b>31.5%</b>	<b>5 003 304 126</b>	<b>5.3%</b>	<b>8 862 247 610</b>	<b>9.3%</b>	<b>95 078 620 200</b>

Source: Cohesion data.



Table P – 2019 CSRs, Specific Objectives under ESF+ programming, and earmarked resources

	SO (a)	SO (b)	SO (c)	SO (d)	SO (e)	SO (f)	SO (g)	SO (h)	SO (i)	SO (j)	SO (k)	SO (l)	SO (m)
EU average (% of total)	21.4%	1.3%	2.6%	6.5%	6.8%	15.5%	9.0%	15.2%	0.8%	0.7%	12.1%	4.2%	3.8%
AT			7.74%			35.24%							
BE	18.12%	1.87%						32.01%					
BG	26.25%	2.51%			11.92%		8.89%	4.53%					
CY	17.99%	9.86%			22.38%						37.85%		5.59%
CZ			6.21%		15.72%					5.48%			
DE			3.19%		3.73%		9.88%		1.78%			7.10%	
DK					24.53%	8.99%	39.71%						
EE	10.36%			7.46%	25.89%			22.57%			9.44%		2.38%
EL	32.36%	0.83%	2.14%		9.71%	10.20%	4.10%	4.28%	1.89%		19.28%	2.76%	
ES	35.59%	0.28%		4.79%	7.89%	13.06%		22.45%					
FI	32.82%						32.82%	31.03%					
FR	22.55%				2.59%		25.62%	28.81%					
HR	30.06%				5.23%			7.66%			22.92%		
HU	14.69%		0.54%		39.08%					1.67%			2.69%
IE	17.73%											32.26%	
IT	24.89%	2.61%	4.55%		2.74%			8.22%			19.05%		
LT	23.77%				7.61%			6.46%			38.27%		

	SO (a)	SO (b)	SO (c)	SO (d)	SO (e)	SO (f)	SO (g)	SO (h)	SO (i)	SO (j)	SO (k)	SO (l)	SO (m)
LU	38.43%						12.47%	28.55%					
LV	18.78%				21.81%			4.06%			20.28%		
MT	18.45%		2.60%			35.77%			0.78%		15.38%		
NL	34.88%						27.25%	35.44%					
PL	14.11%	0.53%	6.88%			16.78%	10.17%	10.68%			15.73%		
PT	15.04%		0.48%					13.73%			17.96%		
RO	21.84%				7.06%	10.17%		0.57%					11.48%
SE							28.09%	42.71%	5.43%				
SI		3.91%			23.18%		11.02%				17.54%	9.96%	
SK	27.93%		2.84%			10.55%				7.49%	10.64%		

#### Legend

	MSs that have allocated ESF+ budget to the SO and corresponding CSR above the EU average
	MSs that have allocated ESF+ budget to the SO and corresponding CSR below the EU average
	MSs that have allocated no ESF+ to the SO and corresponding CSR

Source: Cohesion data and Country reports.

**Table Q – Alignment and indicative financial investment of ESF+ Specific Objectives (SOs) to EPSR principles**

<b>EPSR principle</b>	<b>ESF+ SOs addressing principle in full or partially<sup>263</sup></b>	<b>ESF+ financial allocations to SOs (EUR million)<sup>264</sup></b>	<b>Indicative total ESF+ allocation to EPSR principle (EUR million)<sup>265</sup></b>
1. Education, training and life-long learning	(b) modernising labour market institutions and services to assess and anticipate skills needs and ensure timely and tailor-made assistance and support for labour market matching, transitions and mobility	1 724	44 396.3
	(e) - improving the quality, inclusiveness, effectiveness and labour market relevance of education and training systems	9 339.2	
	(f) – promoting equal access to and completion of quality and inclusive education and training	21 152.9	
	(g) - promoting lifelong learning, in particular flexible upskilling and reskilling opportunities for all	12 180.2	
2. Gender equality	(c) - promoting a gender-balanced labour market participation, equal working conditions, and a better work-life balance including through access to affordable childcare, and care for dependent persons	3 600.7	3 600.7
3. Equal opportunities	(f) – promoting equal access to and completion of quality and inclusive education and training	21 152.9	71 139.1
	(h) - fostering active inclusion with a view to promoting equal opportunities, non-discrimination and active participation, and improving employability, in particular for disadvantaged groups	20 502.4	
	(i) - promoting socio-economic integration of third-country nationals, including migrants	1 066.1	
	(j) - promoting the socio-economic integration of marginalised communities, such as Roma people	940.8	

<sup>263</sup>Please note, that: (i) for greater clarity and space considerations the full text of the specific objectives has been shortened in some cases for space considerations or focuses only on the part of the specific objective which is relevant; (ii) the alignments between EPSR principles and ESF+ SOs are mostly partial and thus only indicative.

<sup>264</sup>Values from the ESF+ Synthesis Report 2022 (version 7.0, 240206).

<sup>265</sup>This ESF+ allocation can only be considered broadly indicative since several of the Specific Objectives (SOs) correspond only partially to specific EPSR principles, while the allocations provided represent the full allocation to each SO.

EPSR principle	ESF+ SOs addressing principle in full or partially <sup>263</sup>	ESF+ financial allocations to SOs (EUR million) <sup>264</sup>	Indicative total ESF+ allocation to EPSR principle (EUR million) <sup>265</sup>
	(k) - enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare; improving accessibility including for persons with disabilities; effectiveness and resilience of healthcare systems; and long-term care services	16 601.1	
	(l) promoting social integration of people at risk of poverty or social exclusion, including the most deprived persons and children	5 644.3	
	(m) addressing material deprivation through food and/or basic material assistance to the most deprived persons, including children; and providing accompanying measures supporting their social inclusion	5 231.5	
4. Active support to employment	(a) - improving access to employment and activation measures for all jobseekers	29 167.3	49 669.7
	(h) - fostering active inclusion with a view to promoting equal opportunities, non-discrimination and active participation; and improving employability, in particular for disadvantaged groups	20 502.4	
5. Secure and adaptable employment	(d) - promoting the adaptation of workers, enterprises and entrepreneurs to change; active and healthy ageing; and a healthy and well-adapted working environment that addresses health risks	8 894.1	8 894.1
1. Wages	Not directly addressed	n/a	n/a
7. Information about employment conditions and protection in case of dismissals	(k) - modernising social protection systems, including promoting access to social protection	16 601.1	16 601.1

<b>EPSR principle</b>	<b>ESF+ SOs addressing principle in full or partially<sup>263</sup></b>	<b>ESF+ financial allocations to SOs (EUR million)<sup>264</sup></b>	<b>Indicative total ESF+ allocation to EPSR principle (EUR million)<sup>265</sup></b>
8. Social dialogue and involvement of workers	(b) modernising labour market institutions and services to assess and anticipate skills needs; and ensure timely and tailor-made assistance and support for labour market matching, transitions and mobility	1 724	1 724
9. Work-life balance	(c) - promoting a gender-balanced labour market participation; equal working conditions; and a better work-life balance including through access to affordable childcare; and care for dependent persons	3 600.7	3 600.7
10. Healthy, safe and well-adapted work environment and data protection	(d) - promoting the adaptation of workers, enterprises and entrepreneurs to change; active and healthy ageing; and a healthy and well-adapted working environment that addresses health risks	8 894.1	8 894.1
11. Childcare and support to children	(c) - promoting a gender-balanced labour market participation; equal working conditions; a better work-life balance including through access to affordable childcare; and care for dependent persons	3 600.7	31 077.6
	(k) - modernising social protection systems, including promoting access to social protection, with a particular focus on children and disadvantaged groups	16 601.1	
	(l) promoting social integration of people at risk of poverty or social exclusion, including the most deprived persons and children	5 644.3	
	(m) addressing material deprivation through food and/or basic material assistance to the most deprived persons, including children; and providing accompanying measures supporting their social inclusion	5 231.5	
12. Social protection	(k) - modernising social protection systems, including promoting access to social protection, with a particular focus on children and disadvantaged groups	16 601.1	16 601.1
13. Unemployment benefits	(k) - modernising social protection systems, including promoting access to social protection	16 601.1	16 601.1
14. Minimum income	(k) - modernising social protection systems, including promoting access to social protection	16 601.1	16 601.1

<b>EPSR principle</b>	<b>ESF+ SOs addressing principle in full or partially<sup>263</sup></b>	<b>ESF+ financial allocations to SOs (EUR million)<sup>264</sup></b>	<b>Indicative total ESF+ allocation to EPSR principle (EUR million)<sup>265</sup></b>
15. Old age income and pensions	(k) - modernising social protection systems, including promoting access to social protection	16 601.1	16 601.1
16. Healthcare	(d) - promoting the adaptation of workers, enterprises and entrepreneurs to change; active and healthy ageing; and a healthy and well-adapted working environment that addresses health risks	8 894.1	25 495.2
	(k) - enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare; improving accessibility including for persons with disabilities; effectiveness and resilience of healthcare systems; and long-term care services	16 601.1	
17. Inclusion of people with disabilities	(h) - fostering active inclusion with a view to promoting equal opportunities; non-discrimination and active participation; and improving employability, in particular for disadvantaged groups	20 502.4	37 103.5
	(k) - enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare; improving accessibility including for persons with disabilities; effectiveness and resilience of healthcare systems; and long-term care services	16 601.1	
18. Long-term care	(k) - enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare; improving accessibility including for persons with disabilities; effectiveness and resilience of healthcare systems and long-term care services	16 601.1	16 601.1
19. Housing and assistance for the homeless	(k) - enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare	16 601.1	16 601.1
20. Access to essential services	(k) - enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare	16 601.1	16 601.1

**Table R – Alignment of EaSI strand annual work programme overall priorities to EPSR principles and examples of corresponding EaSI strand-funded activities**

EaSI strand overall annual priorities (2021-2023)	Corresponding EPSR principle(s)	Examples of corresponding EaSI-funded activities announced in AWP (year)
1. Strengthen employment and skills	(1) Education, training and lifelong learning	Procurement: ‘The actions will cover notably [...] skills (such as European Skills, Competences, Qualifications and Occupations (ESCO) <sup>266</sup> or Europass) and their development, including mutual recognition and transparency of competences, occupations and qualifications expert networks’ (2021-23)
	(4) Active support to employment	Procurement: ‘The actions will cover notably the areas of youth employment, long-term unemployment, undeclared work, platform work, job creation, entrepreneurship, microfinance and social enterprise finance, social economy, future of work [...]’ (2021-23)  Co-delegation to ESTAT: Direct grants to Member States: Labour Force Survey (LFS) (2021-23)
2. Help improve social protection and inclusion	(2) Gender equality	Annual operating grants to support EU-level Social NGO Networks (2021, 2022, 2023)
	(3) Equal opportunities	Annual operating grants to support EU-level Social NGO Networks (2021, 2022, 2023)

<sup>266</sup>ESCO is a European Commission project available in an online portal and can be consulted free of charges. ESCO (European Skills, Competences, Qualifications and Occupations) is the European multilingual classification of Skills, Competences and Occupations. ESCO works as a dictionary, describing, identifying, and classifying professional occupations and skills relevant for the EU labour market and education and training. Those concepts and the relationships between them can be understood by electronic systems, which allows for different online platforms to use ESCO for services like matching jobseekers to jobs based on their skills, suggesting training to people who want to reskill or upskill. ESCO provides 3,039 occupations and 13,939 skills linked to these occupations, translated into 28 languages (all official EU languages plus Icelandic, Norwegian, Ukrainian, and Arabic).

EaSI strand overall annual priorities (2021-2023)	Corresponding EPSR principle(s)	Examples of corresponding EaSI-funded activities announced in AWP (year)
	(9) Work-life balance	Contribution agreement with OECD: Tax Burdens, Benefit Adequacy and Work Incentive (2022)
	(11) Childcare and support to children	Contribution agreement with OECD: Tax Burdens, Benefit Adequacy and Work Incentive (2022) ‘The analytical outputs will include a database on net childcare costs’
	(12) Social protection	European System of integrated Social Protection Statistics (ESSPROS) (2021)
	(13) Unemployment benefits	Contribution agreement with OECD: Tax Burdens, Benefit Adequacy and Work Incentive (2022) ‘The analytical outputs will include [...] a database on activity-related eligibility criteria for unemployment benefits’
	(14) Minimum income	Contribution agreement with OECD: Tax Burdens, Benefit Adequacy and Work Incentive (2022)
	(15) Old age income and pensions	Contribution agreement with OECD: Monitoring the adequacy of pensions (2022)
	(16) Healthcare	Direct grant to the International Agency for Research on Cancer (IARC) Monographs Programme (2023)
	(17) Inclusion of people with disabilities	Annual operating grants to support EU-level Social NGO Networks (2021-23)

EaSI strand overall annual priorities (2021-2023)	Corresponding EPSR principle(s)	Examples of corresponding EaSI-funded activities announced in AWP (year)
	(18) Long-term care	<p>Direct grant to OECD: Monitoring the adequacy of social protection in long term care (LTC) (2022)</p> <p>Contribution agreement with WHO: Building more accessible, better quality and resilient long-term care systems through tools and policy advice for the implementation of the Long-Term Care Recommendation (2023)</p>
	(19) Housing and assistance for the homeless	Contribution agreement with OECD: support OECD survey on housing (2022)
	(20) Access to essential services	<p>Support networks active in the area of social enterprise finance / microfinance support (2022)</p> <p>Posting of workers: enhancing administrative cooperation and access to information (2021-23)</p>
3. Improve labour markets and ensure fair labour mobility	(4) Active support to employment	Posting of workers: enhancing administrative cooperation and access to information (2021-23)
4. Foster safe and fair working conditions	(5) Secure and adaptable employment	Activities to tackle undeclared work (2021, 2023)
	(6) Wages	<p>Posting of workers: enhancing administrative cooperation and access to information (2021-23)</p> <p>Contribution agreement with OECD: Tax Burdens, Benefit Adequacy and Work Incentive (2022)</p>

EaSI strand overall annual priorities (2021-2023)	Corresponding EPSR principle(s)	Examples of corresponding EaSI-funded activities announced in AWP (year)
	(7) Social dialogue and involvement of workers	Contribution agreement with OECD: Global Deal to promote their capacity building for social dialogue and collective bargaining in third countries (2022)
	(10) Healthy, safe and well-adapted work environment and data protection	<p>Contribution agreement with ILO: Strengthen the occupational safety and health (OSH) and notably the labour inspections in the Mediterranean Region (2022)</p> <p>Contribution agreement with WHO: International Programme on Chemical Safety (2021-23)</p>

### 1. Shared management

The specific objectives set in Article 4 of the ESF+ regulation are the main building blocks of the 169 shared management programmes. The programmes select specific objectives, in line with the programme's strategy, in which they set out the output and result indicator targets, as well as the types of actions and target groups and the corresponding finances. In addition to the specific objectives, the fund also supports specific targeted actions to promote the horizontal principles of gender equality, equal opportunities and non-discrimination.

Which specific objectives each operational programme selects and how specifically it pursues those objectives is defined in the programming exercise in cooperation between the Member State and the European Commission. The programming has to ensure that:

- the ESF+ resources are relevant to needs and coherent with other funds, i.e.
  - targeted in response to the country-specific challenges identified in the European Semester<sup>267</sup> and
  - sufficiently concentrated thematically on social inclusion (at least 25% of national allocation), most deprived (at least 3% of national allocation), youth employment (at least 12,5% of national allocation)<sup>268</sup> and children (at least 5% of national allocation)<sup>269</sup>
  - the programmes' stakeholders are involved to ensure the actions' relevance, and
- the financial support is used effectively and efficiently, i.e. the programme sets out a sound intervention logic, including:
  - result indicators and targets contributing to the achievement of the selected specific objectives,
  - types of actions producing the expected (direct) results, including those linked with quantitative targets, as well as
  - output indicators and targets, indicating the actions direct achievements in terms of supported target groups or entities.

<sup>267</sup>Article 7(1) and 7(2) ESF+ regulation.

<sup>268</sup>Concerns Member States whose average rate of young people aged 15-29 not in employment, education or training in 2017-2019 was above the EU average.

<sup>269</sup>Concerns Member States whose average rate of children at risk of poverty or social exclusion for 2017-2019 was above the EU average.

The financial, output and result indicators are in line with the Financial and the Common Provision Regulations' (CPR) definitions: the ESF+'s intervention logic relies on direct outputs (participants with specific labour market or social characteristics) and results grasping change in the participant's situation (e.g. 'in employment'). The ESF+ common output and result indicators, to be monitored in all operations of the fund, are set out in the ESF+ Regulation's annexes. Their definitions and the conventions for their collection and validation were based on existing statistical approaches, agreed with the national authorities and set out in the [ESF+ Common Indicator Toolbox](#).

The data for the financial, output and result indicators are collected by national monitoring and information systems and the indicators' achievement values are reported to the Commission. These are presented in the Cohesion Open Data Platform in detailed data sets. Moreover, a sub-set of the most important common indicators forms the strand's key performance indicators: the Commission's corporate monitoring tool about the ESF+.

**Table S – Overview on the key performance indicators' methodology for the ESF+ shared management strand**

Key Performance Indicator	Definition	Measurement unit	Target	Method for setting the target
<b>Specific Objective 1: Policy area - Employment and labour mobility</b>				
Participants in employment, including self-employment, upon leaving	<p>Unemployed or inactive persons who have received ESF+ support, and who are in employment, including self-employment, immediately upon leaving the ESF+ operation.</p> <ul style="list-style-type: none"> <li>• "Unemployed" is defined as in the indicator "Unemployed, including long-term unemployed".</li> <li>• "Inactive" is defined as in the indicator "Inactive".</li> <li>• "In employment, including self-employment" is defined as in the indicator "Employed, including self-employed".</li> </ul>	Number of persons	7.400.000	For the estimation of result indicator targets, DG EMPL has used historical success rates reported by Member States in the 2014-2020 programming period. The ESF result indicators refer to the outputs directly. E.g. 'participants in employment' is expressed as a direct function of 'unemployed' and 'inactive' in percentages.
Unemployed, including long-term unemployed, participants reached	<p>Unemployed are persons usually without work, available for work and actively seeking work. Persons considered as registered unemployed according to national definitions are always included here even if they do not fulfil all three of these criteria.</p> <ul style="list-style-type: none"> <li>• "Unemployed" is defined as in the indicator "Unemployed, including long-term unemployed" above, of which the indicator "long-term unemployed" is a sub-group with a continuous spell of unemployment lasting at least a year (12 months or more).</li> </ul>	Number of persons	21.500.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0.
Inactive participants reached	"Inactive" are persons currently not part of the labour force (in the sense that they are not employed or unemployed according to the definitions provided).	Number of persons	24.200.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in the 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration

Key Performance Indicator	Definition	Measurement unit	Target	Method for setting the target
				over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0.
Number of participants 55 years of age and above reached	The number of participants aged 55 years old or older upon starting an ESF+ operation.	Number of persons	6.400.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in the 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0.
<b>Specific Objective 2: Policy area - Education</b>				
Participants with lower secondary education or less (ISCED 0-2) reached	Participants for whom the highest educational level completed at the time of starting an ESF+ intervention and according to the International Standard Classification of Education (ISCED) 2011 classification of educational attainment, is ISCED 2 or less	Number of persons	31.100.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in the 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0.
Participants with tertiary education (ISCED 5-8) reached	Participants for whom the highest educational level completed according to the International Standard Classification of Education (ISCED) 2011 classification of educational attainment, is ISCED 3 or ISCED 4.	Number of persons	11.000.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in the 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0.
Participants gaining a qualification upon leaving	Persons who have received ESF+ support and who gained a qualification upon leaving the ESF+ operation. • Qualification means a formal outcome of an assessment and validation process which is obtained when a competent body determines that an individual has achieved learning outcomes to given standards	Number of persons	9.100.000	For the estimation of result indicator targets, DG EMPL has used historical success rates reported by Member States in the 2014-2020 programming period. The ESF result indicators refer to the outputs directly. Participants gaining a qualification is expressed as a direct function of all participants in percentages.

Key Performance Indicator	Definition	Measurement unit	Target	Method for setting the target
Participants in education or training upon leaving	Persons who have received ESF+ support and who are newly engaged in education (lifelong learning, formal education) or training activities (off-the-job/in-the-job training, vocational training, etc.) immediately upon leaving the ESF+ operation.	Number of persons	2.900.000	For the estimation of result indicator targets, DG EMPL has used historical success rates reported by Member States in the 2014-2020 programming period. The ESF result indicators refer to the outputs directly. E.g. 'participants in education or training' is expressed as a direct function of all participants (not in education or training at the start of ESF participation) in percentages.
<b>Specific Objective 3: Policy area - Social inclusion, including contributing to poverty eradication and health</b>				
Participants with disabilities reached	"Participants with disabilities" are persons who are registered disabled according to national definitions.	Number of persons	4.200.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in the 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0.
Participants considered as part of disadvantaged groups reached (Participants with a foreign background, minorities including Roma people, third-country nationals)	Persons who have a foreign background or who are from a minority (including marginalised communities such as Roma people) as according to national definitions.	Number of persons	10.900.000	For the estimation of all EU-level output indicator targets, DG EMPL has used historical unit costs reported by Member States in the 2014-2020 programming period, adjusted for inflation as well as the changes in thematic concentration over time. In line with Article 15 of the ESF+ Regulation, the baseline of the output indicators is 0. In the 2014-2020 programming period, the three target groups covered by this indicator belong to a single composite indicator. On the contrary, in 2021-2027 these three groups are separate indicators (third country nationals – minorities – and participants with a foreign background). For reporting a single achievement value of these three indicators, the three achievement values are added up, including overlaps, i.e. cases in which one participant has been reported by the MS both as a third country national and with a foreign background. As a result, the achievement value represents a theoretical maximum.
Participants engaged in job searching upon leaving	Persons who were inactive when entering the ESF+ operation and who are newly engaged in job searching activities upon leaving.	Number of persons	1.500.000	For the estimation of result indicator targets, DG EMPL has used historical success rates reported by Member States in the 2014-2020 programming period. The ESF result indicators refer to the outputs directly. E.g. 'participants engaged

Key Performance Indicator	Definition	Measurement unit	Target	Method for setting the target
	<ul style="list-style-type: none"> <li>"Inactive" is defined as in the indicator "Inactive" above.</li> <li>"Engaged in job searching" is to be understood as persons usually without work, available for work and actively seeking work, as defined in the indicator "Unemployed".</li> </ul>			in job searching upon leaving' is expressed as a direct function of all participants were inactive when entering the ESF+ operation in percentages.
Number of end-recipients receiving food support	This is the total number of persons having received food support during the reporting year, irrespective of the number of times the support was given. In the case the support is given to a household, all the members of that household are to be counted.	Number of persons	135.800.000	The estimation of the number of end-recipients receiving food/material support and vouchers/cards is based on the allocation of ESF+ budget programmed by SO, combined with the average unit cost of ex FEAD OP I (based on 2014-2020 cost and participant data, and adjusted for inflation). The regulation is not requiring MS to set baselines, milestones or targets for result indicators, but only reference values for a limited number of result indicators. These should be adjusted based on data from similar interventions.
Number of end-recipients receiving material support and vouchers/cards	Number of persons having received material support and vouchers/cards at least once in the reporting year, irrespective of the number of times the support was given. In case the support is given to a household, all the members of that household are to be counted.	Number of persons		

The indicators also allow monitoring the programmes' and the fund's implementation according to the following metrics for instance.

- the achieved outputs in terms of supported participants from different target groups of our policies (e.g. the number of long-term unemployed, low-skilled, young people, participants with disabilities, third country nationals);
- the relationship between outputs and financing via unit costs;
- the achieved results (e.g. qualifications, employment);
- the relationship between results and outputs (success rate) and results and financing (unit cost of success); and
- the results' contribution to the objectives.

In addition to the programmes' own intervention logic, their effectiveness also depends on the external regulatory, institutional and policy context. Therefore, the programmes must fulfil enabling conditions to maximise the co-financed actions' impact. Horizontal enabling conditions, which are applicable to all specific objectives, encompass public procurement regulations, state aid, the execution of the United Nations Convention on the Rights of Persons with Disabilities (UN CPRD), and the enforcement of the Charter of Fundamental Rights of the European Union (as set out in Annex III of the CPR). Member States are required to establish robust monitoring mechanisms for rule implementation and provide effective remedies in case of any observed violations. The formulation of these horizontal enabling conditions is designed to foster the prevention of irregularities in the implementation of the Fund. Thematic enabling conditions set out sector-specific conditions for relevant investment areas eligible for support under the specific objectives and aim at creating a policy environment conducive to effective investments.

For each of the enabling conditions, the CPR sets out associated 'fulfilment criteria'. An enabling condition is fulfilled where all the related criteria are met. The Member State is expected to identify in each programme or in the programme amendment fulfilled and non-fulfilled enabling conditions and provide a justification where it considers that an enabling condition has been fulfilled. As long as an enabling conditions are not fulfilled the Commission cannot make payments related to the condition. In the 2021-27 programming period the enabling conditions were streamlined and their number reduced which was expected to simplify the process of their assessment. At the same time their fulfilment is monitored and checked throughout the whole programming period and not only at the start.

Moreover, the fund provides capacity building to social partners that take part in the co-financed policies' implementation, as well as technical assistance to the managing authorities to implement, monitor and evaluate the programmes. These also contribute to their efficient implementation. CPR Article 16 sets out the requirement for each Member State to set up a performance framework, the expected content and clearly establishes that there must be a close link with the ESF+ specific objectives. Article 16(2) states that milestones and targets shall be established in relation to each specific objective within a programme, with the exception of technical assistance and of the specific objective (m) addressing material deprivation. Article 16(3) underlines that these milestones and targets will allow the Commission and the Member State to measure progress towards the achievement of the specific objectives.

The performance frameworks, including all output and result indicators, were based on methodologies as required by the CPR. They were submitted to the European Commission by the national ESF+ managing authorities together with the programmes. The draft performance frameworks, as well as the output and result indicators, were assessed and improved during the negotiations, with methodological support from the ESF+ Data Support Centre (DSC). Between March 2022 and October 2023, the DSC assessed 82 draft programmes (81 ESF+ programmes and a partial review of ESF+ aspects of a JTF<sup>270</sup> programme in Croatia) and related draft methodological documents submitted by the managing authorities to improve the proposed underlying intervention logic and the target-setting methodology.

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<sup>270</sup>Just Transition Fund.

To monitor whether the programmes are on track towards their objectives, financial, output and result indicators are regularly monitored and reported to the Commission. The programmes' monitoring committees, including the managing authorities and stakeholders participating in programming, are in charge of regularly reviewing the programme's performance. In particular, all programmes are reviewed mid-term (in 2025). The factors to take into account in the review include emerging challenges as identified by the European Semester, the programme's performance and evaluation findings. In addition to the programmes, the fund is also evaluated, both mid-term and ex post.

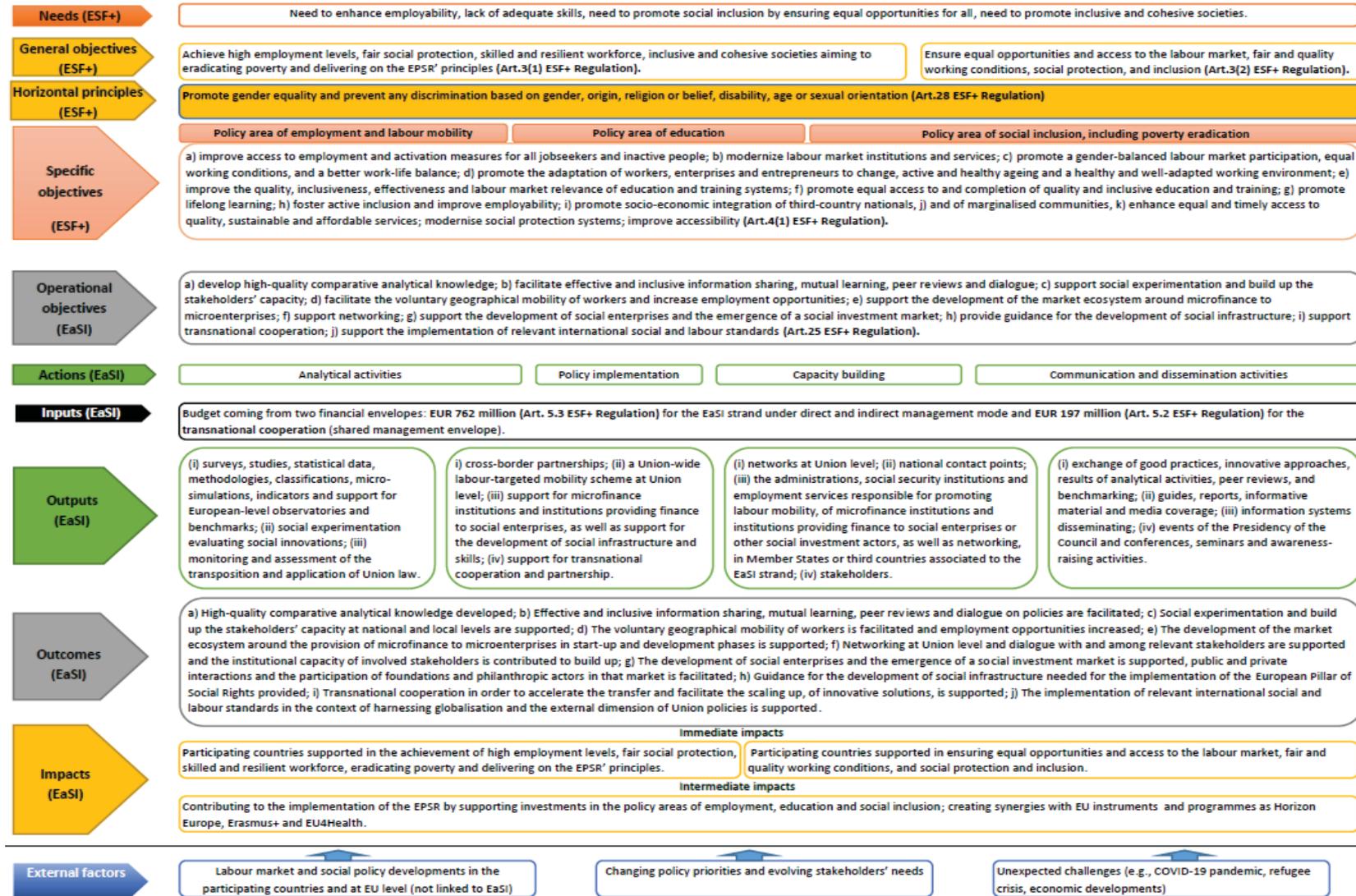
## **2. Direct/Indirect Management Strand (EaSI strand)**

The Employment and Social Innovation strand (EaSI strand) of the ESF+ builds on the former EaSI programme 2014-2020. It maintains the focus on evidence-based policymaking and social experimentation, facilitating job mobility, and activities supporting the microfinance and social entrepreneurship ecosystems and is key to support the European Pillar of Social Rights. Article 4 of the ESF+ regulation establishes 13 specific objectives for the whole fund (direct, indirect management under the EaSI strand and shared management under the ESF+ strand) within three policy areas (employment and labour mobility, education and social inclusion). Article 25 of the ESF+ Regulation establishes 10 operational objectives exclusively for the EaSI strand of the ESF+ (direct and indirect management).

The total budget of the EaSI strand comes from two different financial envelopes (Article 5 of the ESF+ Regulation):

- An amount of EUR 676 (in 2018 prices), corresponding to the part of the financial envelope for the implementation of the EaSI strand, was foreseen in the ESF+ Regulation for the period 2021 to 2027 in line with Article 5.3 of the ESF+ Regulation. This amount corresponds to EUR 762 million in current prices.
- EUR 175 000 000, in 2018 prices, to be allocated for transnational cooperation to accelerate the transfer and facilitate the scaling up of innovative solutions as referred to in Article 25(i) of the ESF+ regulation, coming from the financial envelope for the implementation of the ESF+ strand under shared management. Following the annual budgetary procedures as well as the MFF mid-term review, the budgetary authority has updated in 2024 the amount mentioned above and allocated a total budget of EUR 132 million from the shared management envelope in line with article 5.2 of the ESF+ Regulation for the EaSI strand objective of 'transnational cooperation to accelerate the transfer and facilitate the scaling up of innovative solutions. The exact amounts are determined annually through the EaSI strand financing decisions and annual work programmes.

Figure 1 – EaSI intervention logic



The indicators for measuring performance of the EaSI strand under ESF+ are grouped into two categories:

- **Primary indicators (KPIs/PPI)**, which are aimed to convey the key direction of the expected change under a given operational objective;
- **Secondary indicators (SIP)**, which measure the performance in relation to the financial implementation of the budget defined in Article 5 of the ESF+ Regulation.

For the EaSI strand, the ESF+ regulation establishes five **Key Performance Indicators (KPIs)** to report on the progress of the strand towards the achievement of the specific objectives set out in Article 4(1) and the operational objectives set out in Article 25 (see Table T below).

**Table T – Primary indicators, data source and corresponding operational objectives**

<b>KPI/ PPI</b>	<b>Indicators (number of activities / number of job placements)</b>	<b>Data source</b>	<b>Operational objective (Article 25)</b>
KPI 1	Number of analytical activities	FINAP	(a); (j); (h)
KPI 2	Number of information sharing and mutual learning activities	FINAP	(b)
KPI 3	Number of social experimentation/innovation activities	FINAP	(c); (i)
KPI 4	Number of capacity building and networking activities	FINAP	(f)
KPI 5	Number of job placements under targeted mobility schemes	EURES report	(d)
PPI 6	Number of activities supporting microenterprises, social enterprises, and social investment	FINAP	(e); (g)

Source: DG EMPL

The five KPIs cover 8 (out of 10) operational objectives of the EaSI strand. To ensure that the performance reporting system effectively reports on all the operational objectives established by the regulation, one new Primary Performance Indicator (PPI) linked to the two remaining operational objectives was added (PPI6 - Number of activities supporting microenterprises, social enterprises, and social investment). KPI 1-4 and PPI 6 are output indicators, and the data source is FINAP<sup>271</sup>. KPI 5 is an outcome indicator, its data source being the EURES monitoring report.

For KPI 1-4 and KPI 6, the units of measurement are outputs (or “activities”). A single unit of this corresponds to an open call (with one or multiple beneficiaries / projects funded) or a procurement procedure (with one or multiple contracts). For KPI 5, the unit of measurement is an outcome (number of job placements under targeted mobility schemes).

<sup>271</sup>FINAP is an online tool used by DG EMPL to program its financial activities under direct and indirect management modes. It contains all the information on the activities planned for the relevant year and cover all financial activities supporting the implementation of the DG's core objectives. The information encoded in FINAP is used for the DG's Financing Decisions.

Comparing to the former EaSI programme, the first specific objectives under PROGRESS axis of the EaSI programme (analytical knowledge and comparative information) was expanded into three operational objectives under the EaSI strand (a, j, and h) covering, in addition to the comparative analytical knowledge (a), the implementation of international and social labour standards in harnessing globalisation and EU policies external dimension (j), and offering guidance for the development of social infrastructure for implementing the European Pillar of Social Rights (h). Moreover, a new objective consisting in offering support to transnational cooperation for scaling up tested social policy innovations (i) was included among the EaSI strand operational objectives. This particular operational objective was not directly covered in the previous programming period (EaSI programme). When it comes to EURES axis, its previous related specific objectives are now represented by only one operational objective on the geographical mobility of workers and employment opportunities (d). This operational objective is now monitored by one outcome KPI with the monitoring data sourced from EURES (unlike the other operational objectives, which will be monitored by five output KPIs with the monitoring data coming from FINAP). Meanwhile, all the capacity building related specific objectives under PROGRESS and Microfinance/Social Entrepreneurship axes are now represented by only one operational objective under the EaSI strand support networking and build up institutional capacity (f). Additionally, some of the activities under the EaSI programme are no longer funded under the EaSI strand: the EURES portal was transferred to the European Labour Authority (ELA), and the EaSI financial instruments are currently funded by InvestEU.

The performance monitoring system will also report on the financial resources allocated and committed for the implementation of the budget defined in Article 5 of the ESF+ (secondary indicators). Two input indicators ensure the measurement of the performance in relation to the financial implementation of the budget (see Table U below)

**Table U – Secondary indicators**

Indicators	Calculation
<b>Absorption rate</b>	Implemented (individual + global commitments) / Planned budget (planned) <ul style="list-style-type: none"> <li>• Amount (EUR)</li> <li>• Share (%)</li> </ul>
<b>Budget consumption rate</b>	Budget already spent / total budget. <ul style="list-style-type: none"> <li>• Amount (EUR)</li> <li>• Share (%)</li> </ul>

Source: DG EMPL

Specific mechanisms exist to ensure cooperation between EaSI and shared management strands. **Shared management strand and EaSI strand Technical Working Groups** are stipulated in the ESF+ Regulation to ‘ensure coordination and cooperation between Member State authorities and the Commission on the implementation of ESF+, including on consultation on the work programme of the EaSI strand, monitoring and implementation of each ESF+ strand,

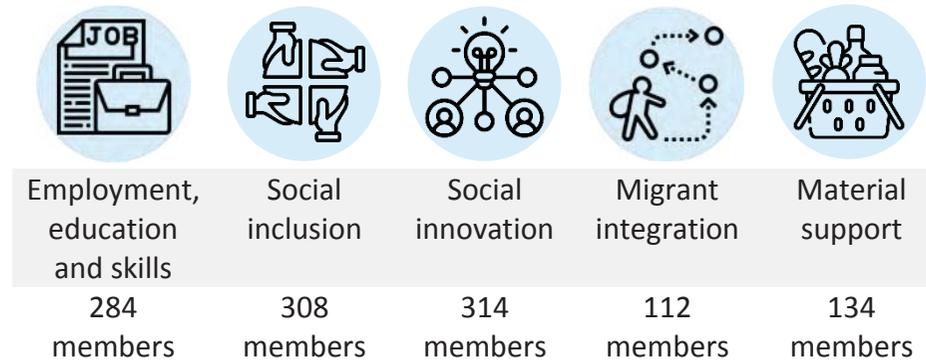
exchanging experience and good practice within and across the ESF+ strands and fostering potential synergies with other Union programmes'. To complement the Technical Working Groups, EaSI strand **National Contact Points (NCPs)** were established under Article 26 of the ESF+ regulation. They provide information on the EaSI strand opportunities, results and good practices to stakeholders and potential applicants, including to national ministries and managing authorities.

Moreover, the ESF+ architecture sets out specific roles and platforms to facilitate interactions and exchanges between strands in promoting social innovation. This new incentive is complemented with social innovation/social experimentation activities implemented by the Commission through **direct management (grants and capacity building related activities)** and through **indirect management under the Social Innovation Plus Initiative** (implemented by [ESFA](#)). With an allocation of EUR 132 million (amount updated in 2024), this initiative aims to accelerate the transfer and facilitate the scaling-up of innovative solutions through activities fostering mutual learning, enhancing capacities, facilitating networking, and providing methodological support to social innovation stakeholders.

The contractor carries out a number of activities to this end (see the Social Innovation Plus Initiative intervention logic in Figure 3 below):

- The **European Competence Centre for Social Innovation** is tasked with gathering, evaluating, validating, and sharing appropriate instruments and methodologies for social innovation. The Centre also launches calls for proposals with the aim to disseminate proven social innovations in EU Member States and EaSI participating countries;
- **National Competence Centres for Social Innovation (NCCs)** aim to support capacity building, knowledge transfer, creating synergies with other ESF+ strands and EU funding programmes, and networking at national and EU level. One key target group of the NCCs is composed of ESF+ managing authorities in charge of the dedicated priorities on social innovation. The early stages of NCCs are expected to be supported by the indirect management strand of the ESF+ through ESFA, but the long-term goal is for them to be financed through other funding streams, for example, national ESF+ programmes of shared management. To date, six projects involving 148 organisations from different countries have been selected to establish NCCs in 23 EU Member States and the UK/Scotland;
- Built on nine thematic networks operating under the ESF programme, five **Communities of Practice (CoPs)** bring together national and regional managing authorities, ministries, intermediate bodies, implementing organisations, such as NGOs, and other partner organisations with the aim of promoting transnational cooperation, including mutual learning and capacity-building activities. There are five communities of practice, each with its own Annual Work Programme, and a coordinator appointed by ESFA. As the figure below shows, each community covers a different thematic area: employment, education and skills, social inclusion, social innovation, migrant integration, and material support;

Figure 2 – ESF+ Communities of Practice



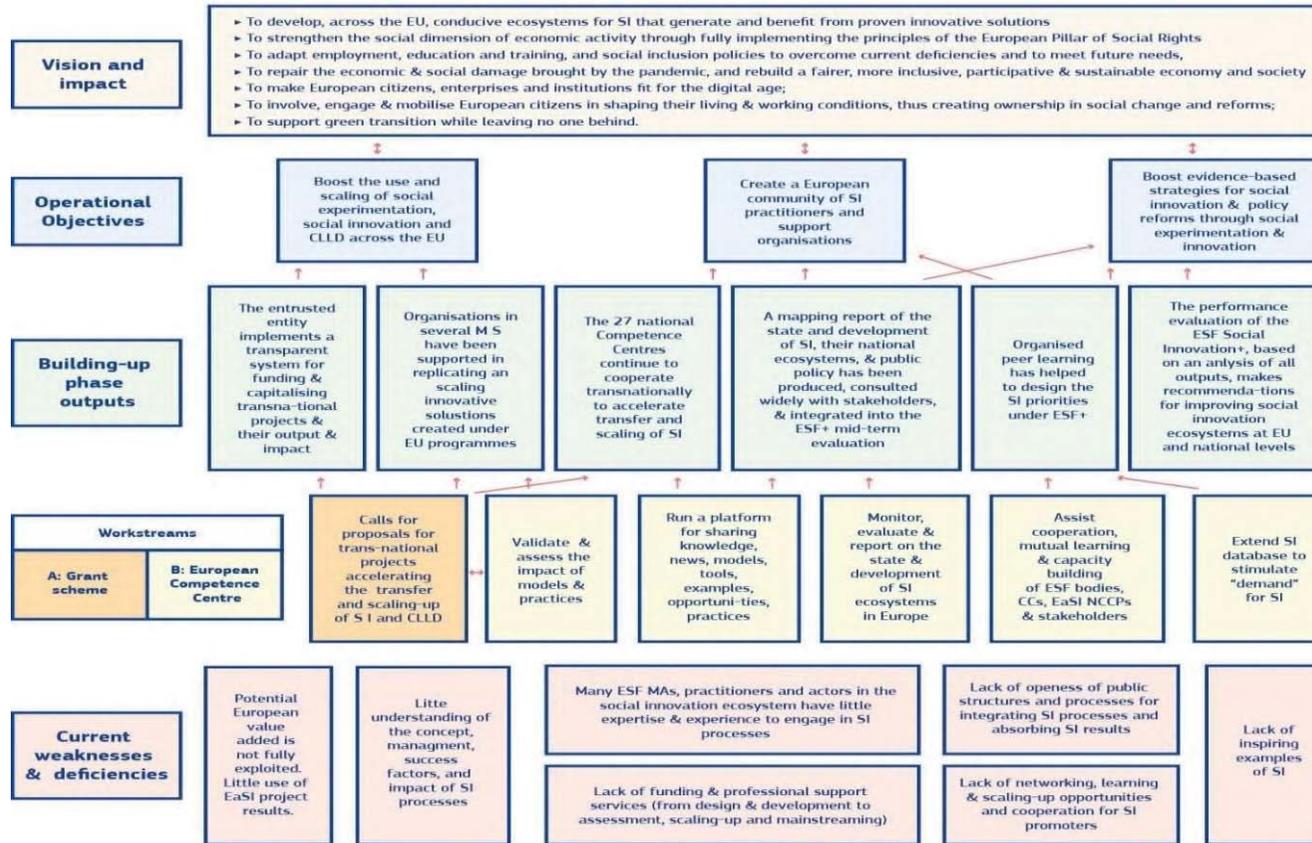
Source: Ecorys consortium, based on information from ESFA

- **Social Innovation Match (SIM)**<sup>272</sup> is a database developed to help social innovation stakeholders to promote and find good practices as well as identify organisations working on social innovation. Currently, this database includes more than 240 projects and activities, and 500 organisations across 27 countries.

<sup>272</sup><https://www.socialinnovationplus.eu/social-innovation-match-sim/>

**Figure 3 – Intervention logic of Social Innovation Plus Initiative**

**ESF Social innovation+ – Intervention Logic**



Source: Progress Report of ESF Social Innovation+ Initiative, 2023.

**Table V – Examples of EaSI funded projects which integrate horizontal principles**

Project/call	Description of the project	Integration of horizontal principles
<p>Intersectional Approach to Combating Homelessness for Women – INTERACT (ESF-2023-HOMELESS)</p>	<p>The ESF+ supports a cross-country project involving organizations from Greece, Italy, Germany, Portugal, Iceland, and Romania, which promotes a holistic and intersectional approach to combating homelessness</p>	<p>The project's objectives include empowering marginalized women to overcome homelessness by providing access to tailored treatment pathways, integrating gender-specific approaches in trauma-informed care, and influencing policy changes towards gender-sensitive and inclusive strategies.</p>
<p>EaSI Operating Grant SGA – Cities for Inclusive Recovery (ESF-2021-OG-NETW-SGA)</p>	<p>Eurocities is committed to reinforcing social Europe and strengthen cities capacity to support the future implementation of new EU social policy initiatives under the action plan of the European Pillar of Social Rights. This project engages cities in the EPSR implementation through a work programme for capacity building, mutual learning and data gathering that leads to concrete policy change at local level. Through this work, cities can deliver EU social policy objectives at local level and help mitigate the socio-economic consequences of the pandemic crisis on the most vulnerable people, driving a fair and inclusive recovery and making a tangible difference for the lives of over 36 million Europeans. The project's focuses on social inclusion and poverty reduction and contributes to building inclusive and cohesive societies aiming to eradicate poverty.</p>	<p>The production of City social trend papers on gender equality demonstrates a commitment to integrating gender perspectives into urban policymaking.</p>
<p>For a Social Economy that reduces Gender Inequalities in Europe (ESF-2022-SOC-INNOV)</p>	<p>The projects set out to develop new data on and investigate the impact of the Social Economy (SE) on gender equality to identify areas of improvement and to make SE's stakeholders more aware and knowledgeable about the topic; It led to the development of hands-on pedagogical contents to help European social enterprises push for more gender-equal practices and develop fairer and more women-inclusive business models; Finally, the project contributed to the emergence of 30 women-inclusive businesses in France, Italy and Portugal to generate a wider ripple effect on women's economic empowerment and shed light on business champions leading the way towards a more inclusive European social economy.</p>	<p>The project strongly aligns with the principle of gender equality and gender mainstreaming by investigating the impact of the SE on gender equality and developing new data on this topic. This approach contributes to a better understanding of gender dynamics within the SE sector and promotes gender mainstreaming in economic policies. The project's objective to increase the participation of women in employment is evident in its goal to contribute to the emergence of women-inclusive businesses in selected Western European countries. This initiative directly addresses the principle of increasing women's participation in employment and combating gender discrimination in the labor market. By focusing on women-inclusive business models, the project also supports the conciliation between working and personal life.</p>

EuroHealthNet SGA 23 (ESF-2022-OG-NETW-NGO-SGA)	EuroHealthNet is the European Partnership for health, equity, and wellbeing. It is made up of 64 national and regional organisations, (sub)national health authorities, public health institutes and health promotion agencies, civil society actors and researchers working on public health, disease prevention, promoting health, and reducing inequalities.	Gender equality and mainstreaming are addressed through the project's promotion of work-life balance and gender equality. By advocating for relevant legislation and incorporating health into Child Guarantee action plans, EuroHealthNet supports the principle of increasing women's participation in employment and combating the feminization of poverty.
Eurocarers 2022-25 (ESF-2021-OG-NETW-NGO-FPA)	This project aims to document the situation of carers in Europe today as well as the solutions that exist or can be developed to support and empower them.	The project addresses the challenges carers face in balancing work and care responsibilities, which disproportionately affect women. This focus aligns with the principles of increasing women's employment participation and promoting work-life balance. The project's goals of improving carers' access to employment and education, while supporting their ability to balance paid work with care responsibilities, contribute to the principles of high employment, fair social protection, and developing a skilled workforce.

Source: EaSI strand monitoring report 2021-2023 based on Funding and Tender Portal.

**Table W – Potential projects for scaling up/transferring (2021-2027)**

Project and duration	Short description of the project	Scaling up / transfer potential
<p><a href="#">Green and Social Hub (GSHub)</a> (Call ESF-2022-SOC-INNOV)</p> <p>Duration: September 2023 – August 2025</p>	<p>The project will promote national and transnational analytical, capacity building and networking activities to raise awareness and share experiences and practices to support disadvantaged groups in accessing and contributing to the green transition. The intervention will equip beneficiaries with knowledge, skills and support to exercise their citizenship rights and become active and aware in the green transition. It will promote community models to develop social, economic and environmental sustainability at local level, by providing information and training, actively involving local stakeholders and ensuring the active involvement of the most deprived targets in this action.</p>	<p>The project has a potential to be replicated due to its community-based approach. It builds awareness among local, underserved populations about energy communities, enabling them to collaborate towards green transition. Its approach also involves close collaboration with public administration, ensuring long-term sustainability and potential replicability in other locations.</p>
<p><a href="#">New circular and social responsible business models within habitat sectors to revitalise rural areas (NewEcoSmart)</a> (Call ESF-2022-SOC-INNOV)</p> <p>Duration: August 2023 – July 2025</p>	<p>The project aims at designing an inclusive social innovation approach to re-/up-skill adults above 45 years old from rural areas for adjusting to the green and digital transition in their existing jobs or to find new ones within the Habitat-related sectors, while also promoting social entrepreneurial skills and mindset that enable the adoption of new processes of production and/ or consumption</p>	<p>The project is well-suited for scaling up due to its thematic focus on upskilling adults over 45 in rural areas, a group often left behind in green and digital transitions. By offering tailored training programmes in green, digital, and entrepreneurial skills, it helps this underserved demographic adapt to evolving economic demands, ensuring they remain employable. This approach is perceived as innovative and</p>

	aligned with circular and socially responsible business models.	replicable, as it fills a critical gap in retraining efforts, which often overlook older rural workers.
<p><a href="#">European African Diaspora for an inclusive circular economy (EurAdice)</a> (Call ESF-2022-SOC-INNOV)</p> <p>Duration: October 2023 – September 2025</p>	<p>The project aims to support African migrants, refugees, and youth from the African diaspora in Europe by developing their skills in the circular economy to enhance professional reintegration and employability. It also focuses on improving their digital skills, preparing them for circular economy jobs, and training them alongside European youth and SME staff to foster entrepreneurial opportunities in Africa.</p>	<p>The project's sustainability is guaranteed by the continuity of the trainings, the network set up by a circular economy exchange platform and the internationalisation of the activities of European circular economy companies towards Africa. Its community-based approach and platform for exchange contribute to long-term sustainability. The platform's continuity after the project's lifespan is a key strength. By aligning skills training with industry needs, EurAdice has the potential to create lasting impacts on employment and cross-continental business collaborations, making it a scalable model.</p>
<p><a href="#">Social sErviceS helpdesK on EU Funds (SESK/HELPDESK)</a> (Call ESF-2021-SOCHD)</p> <p>Duration: May 2022 – April 2024</p>	<p>SESK aims to facilitate and ease social services' access to EU funds. It also paves the way for the set-up of an established Social Services Helpdesk in the future. The Helpdesk provides support to social services by answering questions about EU funding opportunities and which developed several outputs to build social services capacity on how to get access to EU funds, and to help managing authorities finance quality social services interventions.</p>	<p>There is a potential for the Helpdesk project to be continued and scaled up in the future, so as to keep on supporting social services with queries about accessing EU funds, further disseminate and explore the best use of the Helpdesk's deliverables, keep on strengthening the dialogue between the European Commission, managing authorities and social services, and to address some of the main challenges which were identified during the project.</p>

Source: EaSI strand monitoring report 2021-2023 based on the Funding and Tender Portal, Social Innovation Match database and interviews with the Commission.

#### Box 1 – The ALMA project

ALMA, which stands for "Aim, Learn, Master, Achieve", is an EU initiative (<https://ec.europa.eu/social/main.jsp?catId=1549&langId=en>) aiming at supporting young people that are not in any kind of employment, education or training. The goal is to help the most disadvantaged young people (aged 18-29) integrate into society by gaining access to work or training.

This initiative offers participants: (1) an intensive tailored training in their home country (preparatory phase); a supervised work-related experience with accompanying mentoring services for a period of 2 to 6 months in another EU country (mobility phase); and (2) continued support upon return to guide participants in using the newly acquired skills to gain employment or further education in their home country (follow-up phase).

ALMA is seen as potential good example of scaling up a social experimentation project as it builds on a social inclusion initiative implemented by Germany since 2008 (IdA, Integration durch Austausch), that became a real policy implemented by the EC.

The project was taken over in 2012 by an ESF-supported transnational network of 15 EU countries (TLN Mobility Network), and as from 2022 through a transnational call for proposals under ESF+.

In 2021-2027, ALMA is being implemented in the context of the ESF+ programmes at national or regional level under the Social Innovation Plus Initiative (ESF+/EaSI strand).

The ALMA network was established on the 28 September 2022 as the successor of the TLN Mobility Network (

(<https://www.esf.de/portal/EN/Funding-period-2014-2020/TLN-Mobility/content.html>) with the objective to: (1) support Member States (hereinafter ‘MS’) and regions launching ALMA calls (<https://ec.europa.eu/social/main.jsp?catId=1549&langId=en>) under their national and regional ESF+ Programmes 2021-2027; and (2) encourage more Member States and regions to participate in ALMA network.

A call for proposals was launched in 2022 (budget EUR 11.4 million resulting in 29 projects) to help EU countries integrate ALMA types of actions in their ESF+ programmes, by piloting or scaling up an ALMA types of activity.

Source: ALMA Handbook<sup>273</sup> and Social Innovation Plus Initiative website (<https://socialinnovationplus.eu/app/uploads/2024/06/ALMA-network-work-programme-2024.pdf>).

## Box 2 - Challenges for transferring and scaling-up projects

**Convincing stakeholders and ensuring participation:** The most frequently cited challenge during the interviews, mentioned by four stakeholders, is the difficulty in gaining the trust and involvement of stakeholders, in particular policy makers and public authorities, from the beginning of a project. As one interviewee pointed out, it is essential to demonstrate that the project is worthwhile for transferring/scaling up, and this requires well-developed, clearly evaluated cases to convince others of its value. This challenge is heightened when there is a need to work across different levels of government, particularly in areas where much needs to be done at the local level. If public authorities are not involved at the outset, it will be difficult to get them on board later. Involving policymakers at the design stage is seen as crucial, as trying to involve them at the end, for example at a final conference, is less effective. In this context, good networks and dissemination campaigns are seen as key to increasing visibility, as projects that remain under the radar are unlikely to be scaled up. It is important to note that stakeholder involvement was a challenge also encountered during the previous programming period, when political changes led to discontinued support for projects, making it harder to scale, as showed in the evaluation of Social Innovation calls under the EaSI programme 2014-2020.

**Funding and resource constraints:** Three stakeholders raised concerns about funding and resource constraints for scaling up, particularly for smaller organisations. One respondent explained that EU funding often requires co-financing, which can be a significant barrier for non-profit organisations and civil society groups who may struggle to meet these financial requirements. This problem is exacerbated by the perceived rigid rules of EU funding, where certain activities may be deemed ineligible, preventing organisations from accessing funding for certain purposes. For example, one interviewee noted that SMEs cannot use EU grants to invest in for-profit activities, which can limit their participation. In addition, resource constraints, such as time and human resources, can limit the ability of project promoters to engage with policy makers or to promote their activities effectively. This echoes findings from the evaluation of the 2014-2020 period, where a lack of immediate financial resources after the pilot phase was a major barrier to scaling up.

**Methodological rigour and evaluation:** Three stakeholders highlighted the need for a strong methodological framework to ensure the success and scalability of projects. One interviewee highlighted the need to use counterfactual evaluation methods to measure the true impact of social innovation projects. This lack of rigorous empirical evaluation can make it difficult to demonstrate a project's impact and to convince policymakers of a project's scalability, especially when scaling is the goal. A second interviewee echoed this concern, noting that without clear, scientifically validated results, it is difficult for policymakers to commit to wider implementation. One stakeholder mentioned the importance of involving a strong evaluation partner from the outset to ensure proper evaluation throughout the lifecycle of the project. It is worth mentioning that this challenge was also observed in the 2014-2020 period, where the absence of robust evaluation results hindered the ability of projects to demonstrate effectiveness.

**Contextual and systemic barriers:** Two stakeholders discussed the complexity of scaling up projects in different regions or national contexts. One of them highlighted that scaling requires an understanding of what core elements of a project can be transferred, while recognising that each region or system is different and may require adaptation. They pointed out that political agendas, local priorities and different social issues can hinder the successful scaling/transfer of projects, even if a model works well in one context. Another interviewee added that without alignment between project objectives and the agendas of local or national authorities, there is often a mismatch between the supply of solutions and the demand for them, leading to failure to scale. During the 2014-2020 calls, these systemic barriers were similarly observed, particularly when projects were designed to address very specific regional challenges, making transfer to other national contexts more difficult.

**Variability in understanding what constitutes social innovation:** The lack of a common understanding of social innovation presents a significant barrier to the scaling and transfer of successful projects, as noted by one interviewee. Applicants frequently express uncertainty regarding what qualifies as social innovation, with definitions and examples differing between countries. This inconsistency complicates efforts to scale projects across borders, as an initiative recognised as social innovation in one country may not be acknowledged as such elsewhere. Additionally, the appropriate level at which scaling should occur is often unclear. A project that fails in one country might succeed in

<sup>273</sup>See <https://european-social-fund-plus.ec.europa.eu/en/publications/alma-handbook>.

another, prompting important questions about the conditions under which scaling should be pursued. This variability highlights the importance of fostering mutual learning and sharing experiences between countries to better define successful models and establish criteria for scaling.

**Duplication of effort in scaling up:** One stakeholder raised concerns about the potential duplication of effort when scaling up projects. They noted that while small-scale projects allow for experimentation, problems can arise when trying to standardise and scale these initiatives. They suggested that end users may find it difficult to choose between different similar initiatives, leading to confusion about which projects to engage with or prioritise.

Source: EaSI strand report 2021 - 2023 (further publication in 2025 on <https://op.europa.eu/en/>).

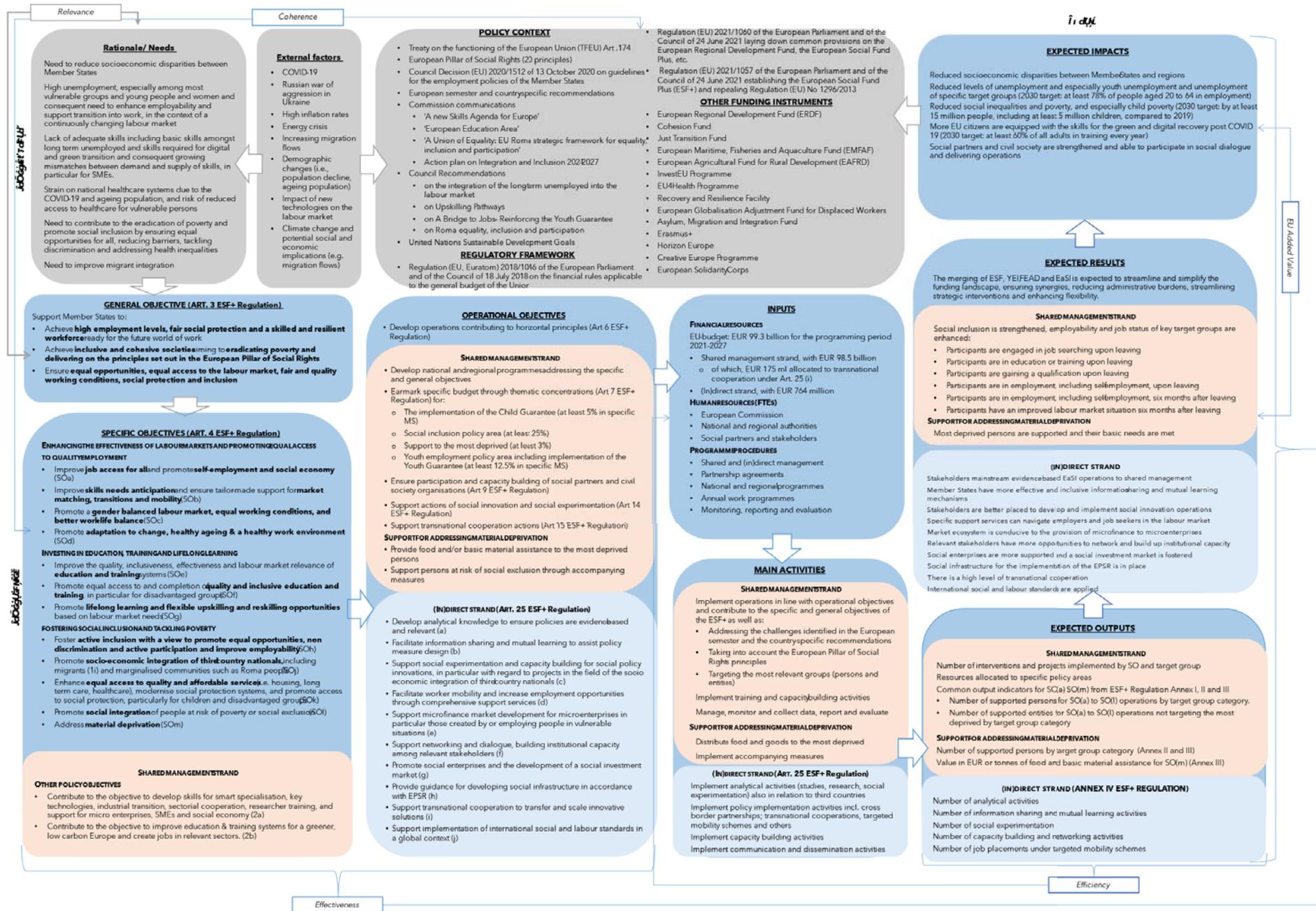
**Table X – Overview of the calls for proposals focused on social innovation launched under the EaSI strand in 2021-2023**

Call title/publication year	Indicative budget (million)	Projects
<b>DG EMPL (direct management mode)</b>		
Social innovations for a fair green and digital transition (2022)	10	17
Social innovation practices to combat homelessness (2023)	15	4
Actions to develop impact performance intelligence services for the social impact investing market actors	4.5	8
<b>ESFA (indirect management mode)</b>		
ALMA (Aim-Learn-Master-Achieve) (2022)	11.6	29
National Competence Centres for Social Innovation: Building-up and Consolidating the Capacity (2023)	8	5
Social Innovations for the Upskilling of Vulnerable Youth, Especially Young People not in Employment, Education, or Training (NEETs) (2023)	9.6	22

Call title/publication year	Indicative budget (million)	Projects
Innovative Approaches to Mitigate the Societal Consequences of Russia's War of Aggression Against Ukraine within EU Member States (2024)	22	42 pre-selected
Innovative Approaches Tackling Long-Term Unemployment (2024)	23	9 pre-selected
Promoting innovative approaches to implement the Disability Employment Package (2025)	10	deadline 10 October 2025
Child poverty and the implementation of the European Child Guarantee		Forthcoming
Social experimentation (topic to be defined)		Forthcoming

Source : DG EMPL

# ANNEX VIII. ESF+ INTERVENTION LOGIC



**Table Y: Links between the intervention logic and the monitoring and evaluation framework**

<b>Elements of intervention logic</b>	<b>Role in theory of change</b>	<b>Data</b>	<b>Data source</b>	<b>Metrics or types of evaluation</b>
Finances – funding (by specific objective)	Input – what amount of money is necessary in which thematic areas to achieve the objectives?	<ul style="list-style-type: none"> <li>• Allocations by specific objective</li> <li>• Cost of selected operations</li> <li>• Expenditure</li> <li>• Payments to MSs</li> </ul>	Transmission of data from MSs (5 times a year, SFC)	<ul style="list-style-type: none"> <li>• Thematic concentration</li> <li>• Absorption rate</li> </ul>
Activities, types of operations	What are the most effective policies, types of operations to achieve our objectives?	Categories of intervention	Transmission of data from MSs (5 times a year, SFC)	
Participants	Output – which target groups should be reached to achieve the policy objective with maximum effect?	<ul style="list-style-type: none"> <li>• Common output indicators</li> <li>• Programme specific output indicators</li> </ul>	Transmission of data from MSs (2 times a year, SFC)	<ul style="list-style-type: none"> <li>• Aggregate output (including KPIs)</li> <li>• Relative share of target groups</li> <li>• Progress to target (achievement ratio)</li> <li>• Unit cost</li> </ul>
Change in the participants' (labour market, social etc.) situation	Result – what should change in the participants' situation to achieve the objective?	<ul style="list-style-type: none"> <li>• Common result indicators</li> <li>• Programme specific result indicators</li> </ul>	Transmission of data from MSs (2 times a year, SFC)	<ul style="list-style-type: none"> <li>• Aggregate result (including KPIs)</li> <li>• Progress to target (achievement ratio)</li> <li>• Success rate</li> <li>• Unit cost of success</li> </ul>
Specific objective - impact	Have the results contributed to policy change? To what extent and at which cost?	<ul style="list-style-type: none"> <li>• Data on participants and non-participants</li> <li>• Survey data</li> </ul>	Survey and administrative data	Impact evaluation (theory-based evaluations, CIE, cost-benefit analysis)
General objective - impact	Has the aimed policy change contributed to the general objective? To what extent?	<ul style="list-style-type: none"> <li>• Economic indicators</li> </ul>	Statistics	Impact evaluation (theory-based evaluations, modelling, econometric studies)

**Summary of findings of the ESF ex-post evaluations for 2007-2013 and 2014-2020 related to the EU added value**

**Volume effects:** ESF under shared management has systematically allowed Member States to increase the number of participants in labour market, social inclusion and education and training measures. In the 2014-2020 programming period 64.6<sup>274</sup> million people were supported through the ESF operations. On average, with the ESF expenditure Member States annually covered 1.0% of their employed persons, 13.3% of the unemployed and 3.5% of inactive persons<sup>275</sup>. The volume effects were particularly important in Member States where the ESF investments are high compared to national funding. Moreover, the subsequent ESF ex-post evaluations found that the volume effects are especially visible in crisis situations (i.e. aftermath of the 2007-2008 financial crisis, Covid-19 pandemic, introduction of austerity measures) when the national resources to finance labour market, social inclusion and education and training measures become more limited.

**Scope effects:** ESF has continuously focused on the vulnerable target groups extending the outreach of labour market, social inclusion and education and training measures to the most disadvantaged individuals who might not be given enough attention in the national policies. In the 2014-2020 programming period almost half of participants were people with low education levels (47% increased from 45% in 2007-2013). Persons with a migrant and minority background, including the Roma constituted 15% of participants (increase from 9% in 2007-2013) and people with disabilities 7% (increased from 5% in 2007-2013)<sup>276</sup>. ESF broadens the existing actions to a diverse range of groups (e.g. persons with disabilities, the homeless, the elderly, those with a migrant or minority background, or with caring responsibilities), and supports new measures and policy developments (e.g. increasing local funding for social inclusion services, the re-orientation of national policies in relation to NEETs) ensuring that they are tailor-made to the specific needs of the groups targeted.

**Role effects:** Operations implemented under ESF shared management have included innovative actions, supported transfer of ideas and contributed to structural changes in the Member States, also in the context of the link with the European Semester. However, the evidence is not consistent in all policy areas. For the last two programming period the role effects have been the most visible in the field of education and training. ESF interventions have had also important role effects in relation to the ESF horizontal principles. For example, ESF interventions played a role in the de-institutionalisation of long-term care and the contribution to policy shifts in terms of promoting work-life balance measures and childcare services as a way to support labour market participation<sup>277</sup>.

**Process effects:** Implementation of ESF has typically led to improved delivery processes, increased capacities of the public administrations and project beneficiaries as well as development of partnerships, networks and other forms of cooperation between relevant

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<sup>274</sup> At the end of 2022.

<sup>275</sup> Study supporting the ESF 2014-2020 ex-post evaluation, ongoing.

<sup>276</sup> Idem.

<sup>277</sup> Idem.

stakeholders. There were almost half a million structures (number of networks, partnerships and other entities) enabled by the ESF in 2014-2020<sup>278</sup>.

### **Summary of findings of the EaSI 2014-2020 ex-post evaluation related to the EU added value**

There is a clear and continuous need for all types of actions assessed, in the light of their continuation in the current programming period (EaSI strand of ESF+, InvestEU and ELA) and of their contribution to the implementation of the European Pillar of Social Rights and its Action Plan: analytical activities to support policy making and evidence, capacity building to enhance stakeholders' participation/impact on policies, instruments to facilitate the geographical and occupational mobility, and instruments to improve access to finance, in particular of vulnerable groups.

It is unlikely that national schemes would be able to support social policy experimentation across different participating countries and EU-level NGO networks the way EaSI did. EaSI was also the most suitable vehicle for EU-wide deliverables such as comparative databases, studies and mutual learning activities that are not always top priorities at other governance levels. Furthermore, there were no other EU resources available which are specifically designed for cross-border partnerships and for an EU-level vacancies portal. Without EaSI support for microfinance and social entrepreneurship, these sectors would probably also slow down leading to less social business creation across the EU and fewer related employment opportunities<sup>279</sup>.

EaSI programme actions stimulated the cooperation among different institutions and stakeholders from public, private, and civil society sectors, which otherwise would have scarce incentives to work together. This facilitated the mutual learning and ultimately a better alignment with the target groups' needs.

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<sup>278</sup> Idem.

<sup>279</sup> This was done under the EaSI programme through financial instruments (transferred to Invest EU in 2021-2027), but also through non-financial initiatives to develop ecosystems for microfinance and social finance and to build of microcredit providers' capacity (types of activities implemented under the current EaSI strand of the ESF+).