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COMMISSION STAFF WORKING DOCUMENT
EXECUTIVE SUMMARY OF THE EVALUATION

European Social Fund Plus mid-term evaluation

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Context and purpose of the evaluation

This evaluation covers the European Social Fund Plus in its two strands: the shared management strand and the direct/indirect management strand (EaSI strand). The obligation to carry out the mid-term evaluation by the end of 2024 is set in the Article 45.1 of the Common Provisions Regulation¹ (shared management) and Article 34.2 of the ESF+ Regulation² (EaSI strand). The evaluation covers the period from the entry into force of the Regulations, i.e. 24 June 2021 until the end of 2024.

Key findings

The ESF+ continues to be highly relevant for addressing the EU policy priorities and national needs. All the principles of the European Pillar of Social Rights (EPSR) that fall in the thematic scope of ESF+ are addressed by the fund. Under the shared management strand, the main challenges in the employment, skills and social policy area are fully addressed by the fund's general objectives. The main key priority areas across the EaSI strand are adequately covered in the strand's Annual Work Programmes and subsequent grants and tenders. The ESF+ is also strongly aligned with the priority issues identified by the European Semester, ensuring a high degree of relevance of the ESF+ intervention logic to national priorities (there are only six Member States in which certain relevant Country Specific Recommendations were not addressed by the ESF+ programmes). ESF+ continues to be broadly relevant also considering future trends and priorities as identified by Draghi report and foresight studies. Nonetheless, stakeholders report that some emerging challenges such as housing, homelessness, migration, green and digital transitions and gender equality may not be sufficiently covered.

The key factors ensuring the continued relevance of ESF+ are the flexibility to (re)programme the fund in line with the changing policy contexts and priorities, the **broad scope of ESF+ intervention**, which allows to address a wide range of (emerging) problems based on the specific national needs, as well as the **involvement of relevant stakeholders** at all levels in the process of programming and monitoring, which ensures the responsiveness to the needs on the ground.

Due to the Covid-19 crisis and related initiatives (including additional resources allocated to the 2014-2020 programming period and the creation of the Recovery and Resilience Facility) **actual implementation of the ESF+ shared management strand started effectively only in 2023.** The level of achievement of the 2029 EU targets for the output and results indicators under shared management was between 8.1% and 14.8% at the end of 2024, roughly in line with the level of financial implementation (7.6% expenditure rate). The EaSI strand implementation was overall on track, with most Key Performance Indicators being in line with or above the expected delivery at the end of 2024.

The European Social Fund Plus merged four former funds (European Social Fund (ESF), Youth Employment Initiative (YEI), Fund for European Aid to the Most Deprived (FEAD),

¹ Regulation (EU) 2021/1060 of the European Parliament and of the Council of 24 June 2021: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R1060>

² 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>

and Employment and Social Innovation (EaSI). The evaluation looks at the effects of this merger:

- **The merger of former ESF and YEI clearly demonstrates a number of advantages.** Such advantages include more streamlined and simplified management and implementation processes as well as greater flexibility in transferring funds depending on changing needs. The positive impacts of the merger are 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 - NEET) and areas of action (employment support).
- **The merger of ESF and FEAD has also produced better complementarities compared to when they operated as separate funds,** in the previous period. These synergies were mostly observed in Member States (18) dedicating a priority to the former FEAD-type operations within national/regional programmes implementing the mainstream shared management specific objectives of the ESF+. On the contrary, little impact of the merger was seen in the nine Member States that have programmed the measures fighting material deprivation as a separate national programme.
- **The effects of the merger of the ESF and EaSI programme have not yet clearly emerged.** While this may partly be due to the slow start of activities under direct, indirect and shared management in the programming period 2021-2027, stakeholders consulted at both EU and national level provided mixed views in relation to the potential for synergies. Different modes of implementation, procedures, timelines of programming, level of governance, stakeholders and type of activities constitute multiple challenges to fully grasp those synergies. Nevertheless, more communication was observed between the two strands' stakeholders, also thanks to the incentives, mechanisms and platforms created for this purpose. The newly created Social Innovation Plus Initiative has the potential to strengthen the transferability and scalability of the EaSI strand results. Still, additional efforts, both at the EU and national levels, as well as more time are necessary for the synergies to occur.

Enabling conditions have been generally effective in ensuring that the necessary preconditions for effective implementation of EU funds are in place. Moreover, **thematic concentration plays an important role in ensuring that Member States continue to support areas which previously benefited from dedicated funding.** The allocation focused on support to NEET remained at the same level in ESF+ as under the former YEI, while the allocation for most deprived under ESF+ increased compared to the former FEAD. The obligation to dedicate a priority axis to social innovation resulted in almost doubling of the allocation for social innovation under the shared management strand.

The evaluation shows that **simplification measures introduced in the 2021-2027 programming period have significantly streamlined the processes and reduced administrative burden.**

Increased use of simplified cost options (SCOs) and financing not linked to costs (FNLCs) have had the most significant impact on the reduction of administrative burden. The use

of simplification measures at lower level (between programme authorities and beneficiaries) has increased from 6.5% in the previous period to 25%. Likewise, their use at upper level (between European Commission and programme authorities) has increased from 32% to 50%. Around 90% of beneficiaries implement projects using SCOs and/or FNLCs. Evidence based on surveys, interviews and simulations suggest that SCOs and FNLCs have significantly reduced the administrative burden, simplified compliance and reduced error rate. The uptake of FNLCs is lower than SCOs, but after the initial hesitation and concerns (notably about audit), managing authorities are showing a growing interest in FNLCs, and their use is expected to increase in the second part of the period.

Other simplification measures have also contributed to increased efficiency of the ESF+.

In the 2021-2027 period, 80 simplification measures were adopted in Cohesion Policy. The most impactful ones contributing to reduced administrative burden were ‘a more proportional approach to audits’ and ‘reduction of the number of verifications’. Efficiency gains have been produced also by the merger of the funds, with fewer programming documents, a simplified monitoring system and lighter reporting requirements, although the programming process and documents are still regarded as complex. Administrative registers are insufficiently used for collecting monitoring data, and digital tools remain underutilized. Evidence from the EaSI strand indicates that the eGrants tool has effectively reduced administrative burden during the application and the reporting phases. However, there is potential for further simplification, particularly for small organisations and the operating grants beneficiaries. Additionally, there is also scope to streamline the dissemination of information about EaSI strand activities which is currently dispersed across multiple websites.

Administrative costs for programming authorities are estimated to be at a low level in comparison with overall spending. They are expected to remain in the range of 2-2.7% of total spending throughout the entire programming period. Costs are mostly concentrated at the beginning of the period.

ESF+ is broadly coherent with other EU funding instruments active in human capital investment. The degree of complementarity varies across funds, with the strongest synergies occurring between the ESF+ shared management and European Regional Development Fund (ERDF). For the EaSI strand, there was a good complementarity with InvestEU. The EaSI strand funded several activities to support the structuring of the market for microfinance and social entrepreneurship, which were then funded by InvestEU.

The Staff Working Document offers additional details supporting the analysis under five evaluation criteria: effectiveness, efficiency, coherence, relevance, and EU value added.

The analysis draws mainly on evidence from a supporting study. To ensure the robustness of the findings, the results were triangulated using different data sources, including stakeholder surveys, interviews, desk research, legal analyses, and analysis of the monitoring data. Conclusions and lessons learned are outlined per each evaluation criterion.