

Brussels, 14 July 2025  
(OR. en)

11559/25  
ADD 1

ECOFIN 995  
COMPET 734  
FIN 869  
SOC 516

**COVER NOTE**

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From:	Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director
date of receipt:	8 July 2025
To:	Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union

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No. Cion doc.:	SWD(2025) 180 final
Subject:	COMMISSION STAFF WORKING DOCUMENT EVALUATION Accompanying the document REPORT FROM THE COMMISSION on the mid-term evaluation of the European Globalisation Adjustment Fund for Displaced Workers (EGF) 2021-2027

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Delegations will find attached document SWD(2025) 180 final.

Encl.: SWD(2025) 180 final



EUROPEAN  
COMMISSION

Brussels, 8.7.2025  
SWD(2025) 180 final

**COMMISSION STAFF WORKING DOCUMENT**

**EVALUATION**

*Accompanying the document*

**REPORT FROM THE COMMISSION**

**on the mid-term evaluation  
of the European Globalisation Adjustment Fund for Displaced Workers (EGF)  
2021-2027**

{COM(2025) 382 final}

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## Glossary

<i>Term or acronym</i>	<i>Meaning or definition</i>
Beneficiary	A natural person who participates in EGF co-funded measures
BRG	Better Regulation Guidelines
DG EMPL	Directorate-General for Employment, Social Affairs and Inclusion
EGF	European Globalisation Adjustment Fund for Displaced Workers
ERM	European Restructuring Monitor (Eurofound)
ESF	European Social Fund
ESF+	European Social Fund Plus
ESIFs	European Structural and Investment Funds
EU	European Union
FAQs	Frequently asked questions
GDPR	General Data Protection Regulation
ISSG	Interservice Steering Group
MFF	Multiannual financial framework
PES	Public employment services
QFR	EU Quality Framework for anticipation of change and restructuring
SFC	System for Fund Management in the European Union
SMEs	Small and medium-sized enterprises
SWD	Staff working document

### 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



This staff working document (SWD) presents the findings of the mid-term evaluation of the European Globalisation Adjustment Fund for Displaced Workers (EGF) 2021-2027. This evaluation was carried out in compliance with Article 22(1)a of Regulation (EU) 2021/691<sup>1</sup> (hereinafter “the EGF Regulation”). It includes relevant statistics on the financial contributions, broken down by sector and Member State.

### 1.1. Purpose and scope of the evaluation

The evaluation assesses the EGF’s effectiveness, efficiency, coherence, relevance and the EU added value. The findings of this mid-term evaluation present how and to what extent the Fund achieved its objectives.

The focus of the evaluation is on the changes introduced for the 2021-2027 period, in order to analyse to what extent these changes led to the expected outcomes. As the uptake of the Fund was low and the concrete evidence was limited<sup>2</sup>, it also examines the reasons for the Fund’s low uptake, despite the simplified requirements for applying for funding introduced by the 2021-2027 EGF Regulation.

The purpose is to see if the EGF, under the current regulatory framework, continues to effectively support workers impacted by global economic transformations, thus aligning with the EU’s overarching social policy objectives.

The evaluation covers 18 EGF applications<sup>3</sup> (of which, 17 cases, i.e. approved applications, and one application still in assessment) received between the entry into force of the EGF Regulation on 3 May 2021 and 31 December 2024. Eleven applications received in 2022-2024 are included, but without analysis of the results, which will only be available between 2025 and 2027 because of the two-year implementation period.

More information can be found in the evaluation’s call for evidence<sup>4</sup>.

The results of this evaluation will be sent to the European Parliament, the Council, the Court of Auditors, the European Economic and Social Committee, the Committee of the Regions and to the social partners.

### 1.2. Evaluation methodology and data limitations

The evaluation follows the Commission’s Better Regulation Guidelines.

The evaluation has been carried out internally by the Commission staff from the unit coordinating the EGF in the Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL). The following sources of information were used for this evaluation:

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<sup>1</sup> Regulation (EU) 2021/691 of the European Parliament and of the Council of 28 April 2021 on the European Globalisation Adjustment Fund for Displaced Workers (EGF) and repealing Regulation (EU) No 1309/2013.

<sup>2</sup> Results of the first 7 EGF cases were only available in the second half of 2024.

<sup>3</sup> The overview of all 18 EGF applications received during 2021–2024 is included in Annex VI.

<sup>4</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation_en)

- Stakeholder consultation activities (see Annex V), including an online public feedback period on the call for evidence via the ‘Europa Have your Say’<sup>5</sup> website, targeted interviews and consultations of national and EU stakeholders involved in designing, managing and delivering EGF;
- Member States applications and final reports submitted;
- Internal research and analysis done by the Commission service, general experience in the management of the EGF, including the Commission internal EGF Database with all the EGF cases from 2007 to 2024;
- External research for literature review was done during a pilot project between the staff of the Publication office and the unit coordinating the EGF in the Commission (Annex II);
- Report from the Commission on the ex post evaluation of the European Globalisation Adjustment Fund (EGF) 2014-2020, COM(2021)788 and accompanying Staff Working Document, SWD(2021) 381;
- Impact assessment accompanying the Proposal for a Regulation of the European Parliament and the Council on the European Globalisation Adjustment Fund (EGF), SWD(2018)289, 5.06.2018;
- Additional evidence from previous Commission reports and evaluations.

The methodology used in the evaluation is detailed in Annex II to this report. An evaluation matrix (provided in Annex III) was elaborated based on the methodology to answer the evaluation questions. It identified operational questions, indicators, judgement criteria and data sources.

The evaluation covers a four-year time-frame, and as the case implementation is two years, only a few cases could be covered by this evaluation. This posed a challenge in terms of the availability and comparability of quantitative data related to the results available of the EGF cases. The lack of quantitative data has been compensated to the extent possible with desk research and qualitative input from stakeholders. More information about the limitations caused by the limited data available are presented in Annex II.

Limitations and challenges of this evaluation are presented in Box 1 below.

#### **Box 1–Limitations and challenges**

- Timing of the evaluation did not allow for more EGF final reports to be analysed as implementation was still ongoing for 11 out of 18 EGF cases.
- Limited data availability existed due to several factors:
  - Relatively small number of EGF applications received during the period covered by the evaluation (18 cases from 13 economic sectors) making it impossible to conduct sectoral analyses.
  - Results were fully available in 7 out of 18 EGF cases since the final reports were submitted to the Commission in the second half of 2024;
  - Qualitative feedback from beneficiary surveys, was available as well, only in 7 out of 18 EGF cases.
- Improved reporting requirements<sup>6</sup> were in place. However, the performance of EGF was still not measured in the absence of legal requirements included in the EGF Regulation.

<sup>5</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation_en)

<sup>6</sup> See explanation on reporting requirements in Section 4.1.1, Use of the EGF for beneficiaries.

- The significant differences across cases, Member States and economic sectors made it challenging to reach reliable and robust conclusions on the EGF's cost-efficiency and cost-effectiveness.
- Limited suitable comparators for data from 2007–2013 remained an issue. A comparison with data from the 2007–2013 period is of limited use because of several changes in the EGF's design (see Annex VIII) and the evolving socio-economic context.
- Limited resources for the evaluation, which was conducted by Commission's own resources, EMPL Unit G2, without procuring a supporting evaluation study.

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

### 2.1 Description of the intervention and its objectives

The EGF expresses Union's solidarity by helping workers who lost their job in the course of large-scale restructuring events (more than 200 displaced workers) with the aim of helping those workers find decent and sustainable jobs as quickly as possible.

The EGF has been designed to tackle the employment and social challenges of structural change, helping displaced workers which are the beneficiaries of EGF assistance. The EGF also contributes to the implementation of the principles set out in the European Pillar of Social Rights and to enhancing social and economic cohesion among regions and Member States.

For the **2021-2027 period**, the EGF Regulation (EU) 2021/691 introduced **significant changes**<sup>7</sup>, adapted to the changing realities of the economy. The detailed description of the EGF, the changes introduced by the 2021-2027 Regulation, together with the evolution of the main rules of the EGF between 2007 and 2024, and the functioning of the EGF during 2021-2027 are presented in Annex VIII.

As its purpose, which is to provide quick support in situations of unexpected restructuring events, the EGF is one of the flexible and special instruments outside and above the budgetary ceilings of the multiannual financial framework (MFF). The EGF thus does not have an annual budget that it is expected to spend, but additional funding up to a pre-defined maximum annual amount that may be mobilised, if needed. The co-financing of each case must be approved by the European Parliament and the Council.

In practice, the annual amount used is dependent on the number and the requested amounts of the applications received from Member States. For 2021-2027, the EU initially provided the EGF with a maximum annual ceiling<sup>8</sup> of up to EUR 186 million (2018 prices). Due to the low uptake of the EGF during 2021-2023, with the MFF mid-term review<sup>9</sup>, the annual ceiling was reduced to EUR 30 million (in 2018 prices) for the years 2024-2027, due to

<sup>7</sup> The changes were introduced largely based on the [Impact assessment accompanying the Proposal for a Regulation on the EGF 2021-2027](#), the [EGF ex post evaluation of the EGF 2014-2020](#) and previous EGF evaluations and reports on the EGF, such as [EGF ex-post evaluation 2007-2013](#), the [European Court of Auditors' special report No 7 \(2013\) on the EGF](#), the [European Parliament's European Implementation Assessment of the EGF 2007-2014](#).

<sup>8</sup> The maximum amount ever used in a given year was EUR 132.1 million (in 2010)

<sup>9</sup> Council Regulation (EU, Euratom) 2024/765 of 20 February 2024 amending Regulation (EU, Euratom) 2020/2093 laying down the multiannual financial framework for the years 2021 to 2027.

the newly emerging financing needs, such as support for Ukraine, geopolitical tensions, natural disasters, etc<sup>10</sup>.

### *Management mode*

The EGF is under shared management, the Member States are responsible for applying for assistance and for implementing the measures. The subsidiarity principle also limits EU action to what is necessary to achieve its objectives as laid down in the Treaties, and in line with this principle, the EGF can be mobilised only upon request by a Member State, when it is considered needed.

### *Intervention logic*

The intervention logic describes how the intervention was expected to work or lead to the intended change. It summarises the links and causal relationships between the problems and needs identified and takes into consideration the general and specific objectives that the legislative framework was designed to address. It presents the specific actions (inputs) for addressing those problems and needs, as well as expected outputs, results and impacts. A diagram representing the intervention logic is presented in Annex VII.

With a view to achieving economic, social and territorial cohesion in the EU, it is necessary to develop a coordinated strategy for employment. This strategy should particularly focus on the promotion of a skilled, trained and adaptable workforce as well as on labour markets' responsiveness to economic change. To this end, the Union shall contribute to a high level of employment by supporting and, if necessary, complementing Member State's action through the mobilisation of the European Globalisation Adjustment Fund for Displaced Workers (EGF) to co-finance measures to support redundant workers in case of major restructuring events. These events, by their scale and effects, cause a significant impact and can test the limits of what regular national labour market programmes are able to provide to assist displaced workers.

The overall aim of the EGF is to express solidarity with and provide support to workers made redundant and self-employed persons whose activity ceased due to globalisation or a global financial and economic crisis.

The EGF's objective of improving participants' education/training and labour market situation has two dimensions: the general one of **solidarity** and the specific one of **emergency relief**.

**Solidarity** of the EGF relates to supporting the re-integration of displaced workers and self-employed persons into the labour market, with a particular focus on the most disadvantaged groups.

The **emergency relief** dimension refers to EU's intention of providing reactive support in cases of unexpected mass redundancies when national administrations would find it extremely difficult to cope with the situation by themselves.

For the EGF, the problems and needs identified, in the context of structural changes, the consequence are large scale restructuring events, when the low-skilled or vulnerable are affected the most. Usually workers affected the most require a more tailored, a longer or a more intense support so that they can re-skill, up-skill and find new jobs. Often the national support measures are not enough, or are too short, too basic to respond to their needs.

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<sup>10</sup> Special meeting of the European Council (1 February 2024) – Conclusions, [20240201-special-euco-conclusions-en.pdf](#)

As the intervention logic's **starting point** is the support offered to the displaced workers (EGF beneficiaries). The inputs both at EU and National and delivery levels consist of funding and time necessary to design and implement the package of personalised measures for the displaced workers. The fund's results are measured at micro-economic level. For example, the shared management common output indicators collected via the monitoring system include the number of beneficiaries by employment status (unemployed/inactive/employed (dependent)/self-employed), while the common long-term result indicators include the percentage of EGF beneficiaries who gained a skill or qualification and the percentage of EGF beneficiaries in education or training. Provided that a certain part of the positive outcomes would have not materialised without EGF support, higher results indicate an increased employment at regional and local level, increased GDP, which, according to the theory, leads to the **desired economic impacts**, i.e., added value, societal and environmental impacts, such as increased activity and scope to assist displaced workers, influencing the operation of other funding sources and national policy choices, improved social cohesion, employment in green growth.

Each step of the intervention logic corresponds to specific parts of the monitoring and evaluation framework of EGF (see Annex VII). The EGF's outreach is shown by output indicators (e.g. number of workers targeted, of older unemployed people, people at risk of poverty targeted, number of workers receiving EGF measures etc.). Result indicators describe the change in the beneficiary's situation (e.g. how many moved to education or training or to employment, or gained a skill or qualification).

The indicators do not set a baseline, any targets or milestones. The number of targeted beneficiaries as specified by the Member State concerned is not considered a baseline. The reason for this is that some Member States target only workers who have been made redundant and have little chance of successfully moving jobs without tailored support, while other Member States target all workers who have been made redundant.

In short, to address the problem of unexpected large scale restructuring events, the EGF **demonstrates solidarity with displaced workers and self-employed persons whose activity has ceased in the course of unexpected major restructuring events** through tailor-made support for individuals<sup>11</sup>, ranging from personalised guidance and training courses to assistance in setting up a business. Through this, the EGF supports socioeconomic transformations that are the result of globalisation and of technological and environmental changes and contributes to the implementation of the principles set out in the European Pillar of Social Rights and shall enhance social and economic cohesion among regions and Member States.

## 2.2 Point(s) of comparison

Throughout this Staff Working Document, the EGF is compared to the way it was implemented in the previous programming periods. The effects of the changes in the design and implementation are compared mostly in qualitative terms, and only to a limited extent in quantitative terms across the evaluation criteria.

Comparison in qualitative terms is done by looking at the results of the changes introduced by 2021-2027 Regulation related to: a) the larger scope of eligibility; b) decreased threshold of dismissals needed to apply for the EGF; c) faster and simpler procedures; d) new

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<sup>11</sup> See Annex VIII for detailed explanation on how the EGF works and the type of support offered.

requirement to introduce the dissemination of skills required in the digital age and in a resource-efficient economy to be considered a horizontal element of any coordinated package of personalised services offered; e) a new tool: the beneficiary survey for each EGF case; f) other changes (See Annex VIII). For example, by broadening the scope of the EGF and by making the application procedure easier and faster in the current programming period, the fund is expected to be more inclusive and to reach more displaced workers in need of assistance. Beneficiary surveys will help assess the extent to which the assistance offered had an impact on the perceived change in the employability of beneficiaries or, for those who have already found employment, on the quality of the employment found (e.g. in terms of changes in working hours).

In terms of quantitative comparison, there is limited information to analyse the performance of the EGF. The actions covered by the EGF are, by definition, not programmable because restructuring events giving rise to the redundancies are unexpected. Therefore, defining in advance how many mass redundancy events will take place in any given year and what would be the profile of beneficiaries is not possible for the EGF. The common output and results indicators will not have a baseline, targets or milestones. The historical success rate will not be adjusted in case the expected macroeconomic environment turns to be less favourable in the EU labour market and job-placements become more difficult, due to current or future crises. Thus, the common output and results indicators<sup>12</sup> give information about the results of the EGF cases, however they cannot be considered performance indicators.

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

#### **Context**

Job displacement is a common occurrence across all economies and a natural part of structural change, but it can have significant impacts on workers, regions and communities. Nowadays globalisation is increasingly knowledge driven and no longer the main reason for structural changes.

During 2021-2024, job displacement and worker relocation have become critical issues in the context of the current economic shocks, as industries face rapid changes due to automation, globalisation, and the twin digital and green transition. While these changes, accelerated by the COVID-19 pandemic, increase vulnerabilities in traditional sectors, (such as manufacturing) and expose many – especially low-skilled and vulnerable workers – to the risks of job loss, they also create opportunities for labour market shifts (such as renewable energy, advanced manufacturing, digital technologies). However, these opportunities often require different skillsets and may not arise in the areas most affected by displacement.<sup>13</sup>

Amid a cost-of-living crisis, the robust recovery from the COVID-19 recession lost momentum since 2022. The energy shock caused by Russia's war of aggression against

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<sup>12</sup> EGF Indicators are monitored in MFF Performance Results Reports. Link [4e8f26d1-6604-496f-87c4-0b9a886adf29\\_en \(europa.eu\)](https://ec.europa.eu/economy_finance/en/4e8f26d1-6604-496f-87c4-0b9a886adf29_en).

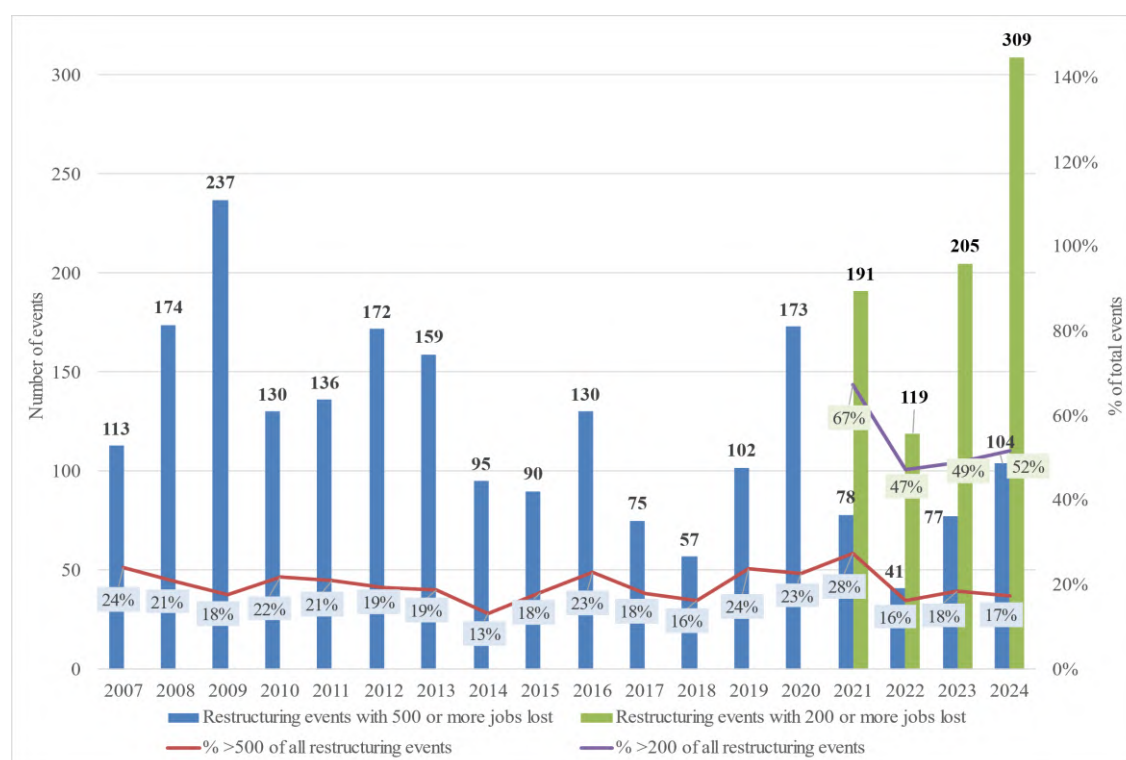
<sup>13</sup> [OECD Employment Outlook 2018 | OECD](#)



Ukraine put a drag on global growth and contributed to propelling price inflation in many countries to levels not seen in decades.<sup>14</sup> Labour markets have proven resilient in the wake of adverse shocks and continued to perform strongly, with many countries seeing historically high levels of employment and low levels of unemployment.<sup>15</sup>

According to the Eurofound's European Restructuring Monitor (ERM)<sup>16</sup> database, on average about 670 restructuring events (of any size)<sup>17</sup> occurred within the EU-27 on a yearly basis between 2007 and 2020. After a peak of large-scale restructuring events (involving 500 or more job losses) of 173 in 2020 due to the COVID-19 pandemic (+68% compared to 2019), the number of such events steadily decreased until 41 in 2022, the lowest number recorded since 2007. However, since 2024 the tide started turning again and more restructuring events have been recorded, reaching 104. (see Figure 1 below).

Figure 1. Large-scale restructuring events in EU-27, 2007–2024



Source: Eurofound, European Restructuring Monitor Database

In 2024, a slow-down in job creation was noticed and also an increase of jobs lost, which exceeded the total number of jobs created. The sectors with the largest recorded number of jobs lost in 2024 are manufacturing, transportation/storage and retail. (see Figure 2 below).

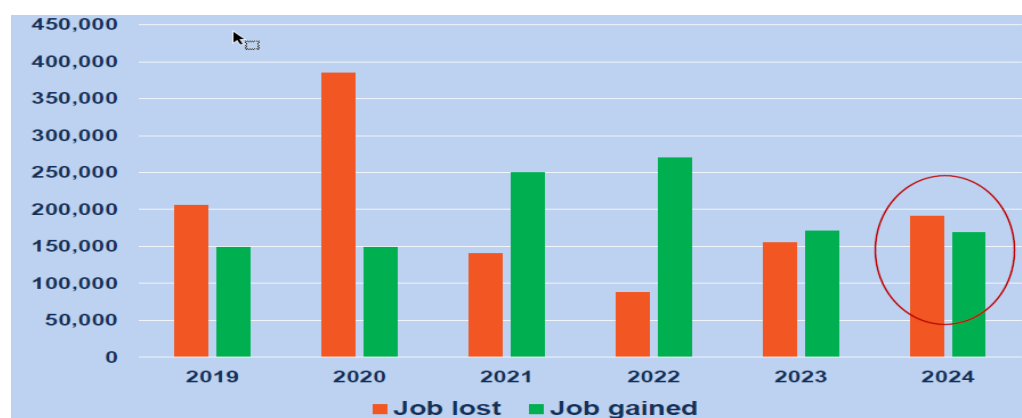
<sup>14</sup> OECD (2023), *OECD Employment Outlook 2023: Artificial Intelligence and the Labour Market*, OECD Publishing, Paris, p.19, <https://doi.org/10.1787/08785bba-en>.

<sup>15</sup> OECD (2024), *OECD Employment Outlook 2024: The Net-Zero Transition and the Labour Market*, OECD Publishing, Paris, p. 21, <https://doi.org/10.1787/ac8b3538-en>.

<sup>16</sup> ERM is the most comprehensive source of data that records all announcements of redundancies in a certain year. Restructuring announcements are recorded in the ERM based on a screening of the main media sources in each of the Member States. [European Restructuring Monitor | European Foundation for the Improvement of Living and Working Conditions](https://www.eurofound.europa.eu/en/publications/european-restructuring-monitor)

<sup>17</sup> In order to be included in the ERM database, an individual restructuring case must involve the announced loss or creation of at least 100 jobs, or employment effects affecting at least 10% of a workforce of more than 250 people. For the purpose of this evaluation, only cases involving job losses were considered.

Figure 2. Total number of jobs recorded in large restructuring events, EU 27, 2019-2024

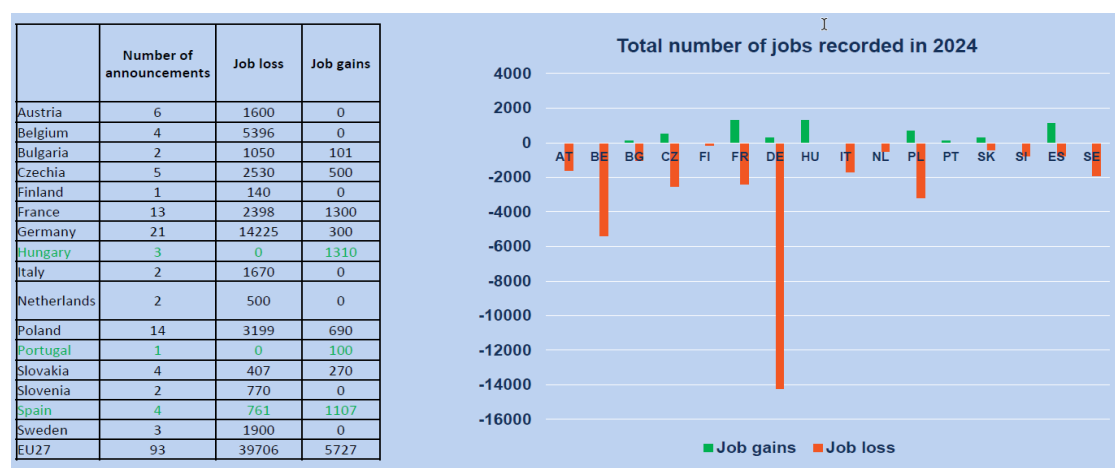


Source: ERM, Data until 20 November 2024, EU27

During 2021-2024, manufacturing accounted for the largest share of restructuring events, even though its share fluctuates over the years.<sup>18</sup> During 2021–2024, there were five EGF cases<sup>19</sup> targeting redundancies in the manufacturing sectors (NACE 27, 29, 30). (see details in Figure 3)

In the manufacturing sector, the restructuring trend in car manufacturing show a significantly more jobs were lost in EU 27 in 2024 than they were created.

Figure 3. Restructuring trends in the car manufacturing in 2024, EU 27



Source: ERM, NACE sectors included are: C 27.1, 29.1, 29.2, 29.3, 30.3, 30.9, 74.9

In the first half of 2020, the COVID-19 pandemic caused the deepest recession in EU history. Annual GDP fell by 6.4% in the EU in 2020 compared to 2019<sup>20</sup>. Monthly unemployment rates steadily increased starting from March 2020, from an average of 6.5% in March 2020, to 7.9% in January 2021. However, afterwards the unemployment rate

<sup>18</sup> According to the ERM, the share decreased from 41% (2002-2007) to 29% (2015-2016), then increased to 43% (2020), and was around 40% in 2024.

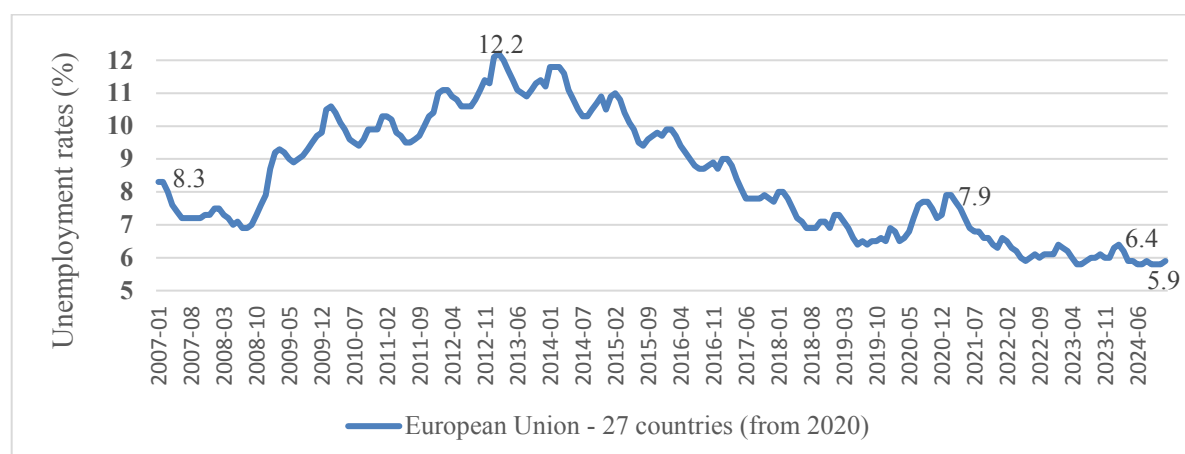
<sup>19</sup> EGF/2021/004 ES/Aragon automotive, EGF/2021/005 FR/Airbus, EGF/2021/006 ES/Cataluña automotive, EGF/2021/008 EL/Attica Electrical Equipment Manufacturing, EGF/2024/003 BE/Van Hool.

<sup>20</sup> Eurostat, table namq\_10\_gdp and table namq\_10\_a10\_e.



started to decrease and reached 5.9% in December 2024, an even lowest recorded since 2007, as shown in Figure 4 below.

Figure 4. Monthly unemployment rates (% of active population), EU-27, 2007–2024



Source: Eurostat, [ei\_lmhr\_m]

### Current state of play

This section provides an overview of EGF implementation during the 2021-2024 period. It includes figures on EGF applications and covers the Fund's performance by country and by economic sector defined at NACE Revision 2 division level. The profile of people targeted by the EGF (by sex, age groups and education level of the displaced worker) is also reported.

Since the EGF became operational in 2007, the number of applications has been highly cyclical, responding with a delay to economic developments<sup>21</sup>.

**In what follows, the 18 applications are considered.** Of these, 17 applications were approved (i.e. EGF cases)<sup>22</sup> and one was still in assessment by the Commission when this staff working document was drafted. This application is therefore only partially covered in the overview of 2021–2027 EGF applications (in Figures 5-7 and in Annex VI).

### *Breakdown of EGF applications by event type and intervention criterion<sup>23</sup>*

In the majority of the 18 EGF applications (61%), the main reasons for the displacements, given by the applicant Member State's authorities were crisis, such as corporate crisis (6), the COVID-19 health crisis (5), major changes in world trade patterns due to globalisation

<sup>21</sup> OECD (2013), [Back to work: Re-employment, earnings and skill use after job displacement](#), p. 13.

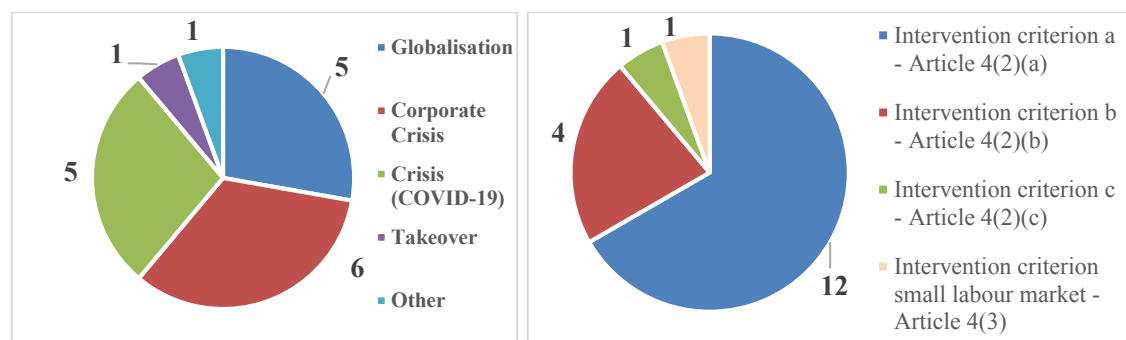
<sup>22</sup> The 18 EGF applications from EGF/2021/001 to EGF/2024/003 (inclusive) are listed in Table 6.

<sup>23</sup> See Article 4 Regulation (EU) 2021/691. The modified intervention criteria refer to a decreased threshold of displacements from 500 to 200 and different conditions for the reference period, as follows:

- At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in an enterprise in a Member State;
- At least 200 displaced workers (or self-employed persons activity ceasing) over a reference period of 6 months in enterprises, especially SMEs that belong to the same sectors in one or two adjoining regions;
- At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in enterprises, especially SMEs that belong to the same of different sectors in the same region.

(5). Other causes, such as company takeover or other, was reason for displacements each in one application.

Figure 5. Applications per cause (left) and intervention criterion (right)



Source: European Commission, EGF Database.

### ***Breakdown of EGF applications per Member State***

In terms of geographical reach, these 18 EGF applications covered 7 Member States: Belgium (6), Spain (4), France (3), Italy (2), Germany (1), Greece (1), and Denmark (1). These Member States had benefited from the EGF during the two previous programming periods as well, 2007–2013 and 2014–2020, except for Denmark which applied only during 2007–2013.

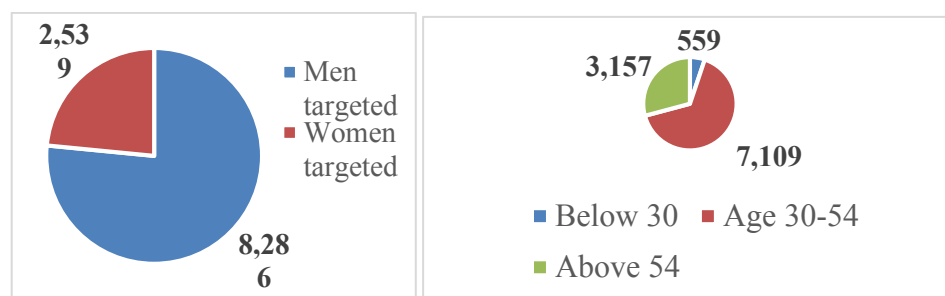
The total number of people targeted was highest in Belgium (4 977), followed by France (2 243) and Spain (1 373) and lowest in Italy (190).

### ***Breakdown of people targeted through EGF applications***

Across all 18 EGF applications, 10 825 workers were targeted via EGF measures, of which, 77% were men and 23% women. However, women represent 36% of the beneficiaries who participated in the EGF measures. The numbers differ significantly across cases, with a high number of male beneficiaries in cases assisting workers dismissed in traditionally ‘male-dominated’ sectors, such as automotive, aircraft industry, metalworking, machinery and equipment, logistics, etc, and more female beneficiaries in sectors such as retail trade. A similar number of both female and male beneficiaries was observed in two EGF applications in the air transport sector.

As for age groups, the 10 825 workers targeted belonged to the following age groups: below 30 (5.16%), 30-54 (65.67%) and above 54 (29.16%) (See Figure 7 below). The 2021-2027 period reduced the required age groups to two (below 30 years of age and above 54 years of age), from five age groups required during 2014-2020 (15-24, 25-29, 30-54, 55-64 and above 65). Based on the two age groups, the third group, age 30-54, is calculated by the Commission.

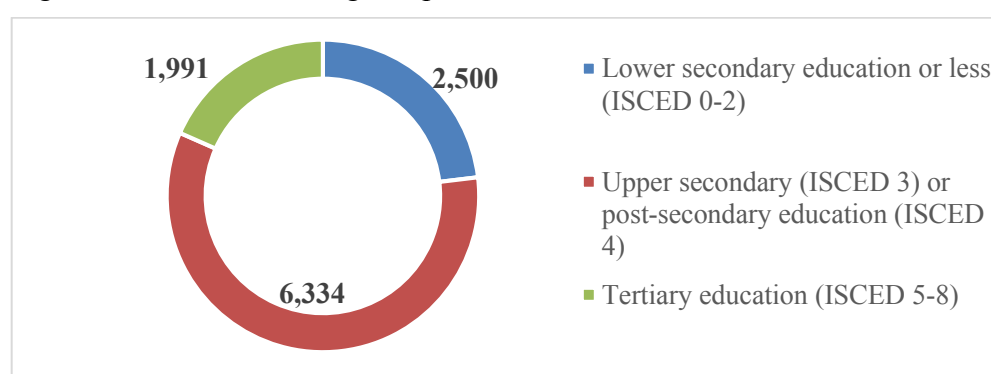
Figure 6. Men and women targeted (left) and age groups (right)



Source: European Commission, EGF Database.

The education level of the targeted workers, a new requirement at application stage, shows that in the 18 EGF applications, 23% had lower secondary education or less, 59% had upper secondary or post-secondary education and 18% had tertiary education.

Figure 7. Beneficiaries targeted per education level



Source: European Commission, EGF Database.

### **Breakdown of applications per sector**

These 18 EGF applications cover 13 economic sectors. The most common sectors were automotive (3 cases), warehousing and support activities for transportation (3 cases), retail trade (2 cases), air transport (2 cases) and basic metals (2 cases). Other sectors with one EGF application each were in the sectors of metalworking industry, manufacture of transport equipment, of electrical equipment, of paper, of food products, of machinery and equipment. The cases in the automotive (buses) sector targeted the largest number of beneficiaries, 2 397 people in total. The smallest number of people targeted in a single case was 190 persons in the warehousing and support activities for transportation sector carried out in a port.

### **Completed EGF applications**

Of the 18 EGF applications outlined above, seven had ended by December 2024 and submitted their final report to the Commission. **The analysis of the results will be based on these seven final reports.** Across these seven cases, of the 2 534 people targeted, 1 904 people were assisted in total. This means that 75% of targeted beneficiaries were helped by the EGF (see Figure 8 below).

As for the distribution across Member States, the largest numbers of beneficiaries assisted were in Italy and Spain, while the smallest numbers were in France. The rates of beneficiaries helped<sup>24</sup> ranged from 41% (Spain) to 101% (France).

Figure 8. Beneficiaries targeted vs assisted total (left) and per Member State (right)

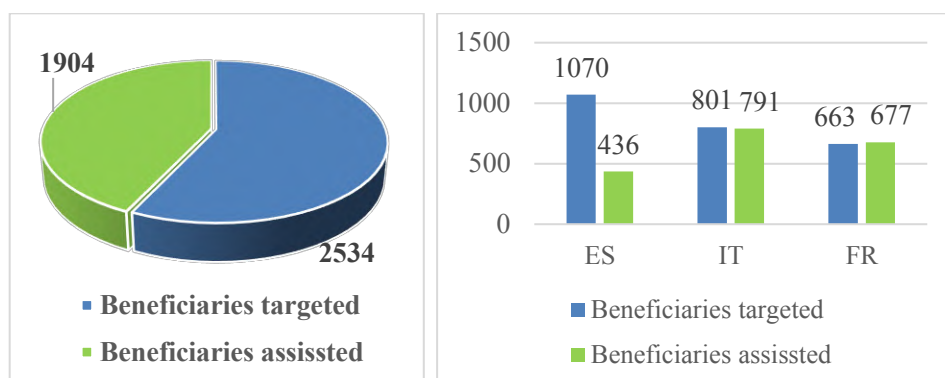
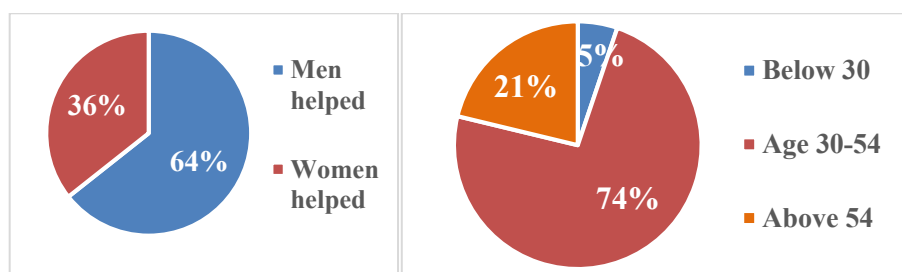


Figure 9. Beneficiaries assisted per gender (left) and age group (right)



Source for Figures 9 and 10: European Commission, EGF Database.

Across the seven cases, about EUR 9.1 million in EGF funds were spent in total, compared to about EUR 14.5 million allocated. This gave an **overall absorption rate about 63%**. The average absorption rates<sup>25</sup> for individual Member States ranged from 8.1% (Spain) to 100% (France).

An overview of all 18 EGF applications submitted between 2021–2024, together with case profile data by Member State and by sector, can be found in Annex VI.

### ***EGF beneficiary surveys***

For evaluation purposes, a beneficiary survey has to be conducted for each EGF case, a new requirement introduced for the 2021-2027 period. The template of the survey was designed by the Commission in close cooperation with the Member States and is translated into all official languages of the Union. Each survey is open to participants via the EU Survey website.

Each beneficiary survey is open to participants for at least four weeks and is launched during the sixth month after the end of the implementation period. Member States assist the Commission in conducting the beneficiary survey, by encouraging beneficiaries to

<sup>24</sup> Rate of beneficiaries helped is defined as the ratio of persons assisted over the number of persons targeted.

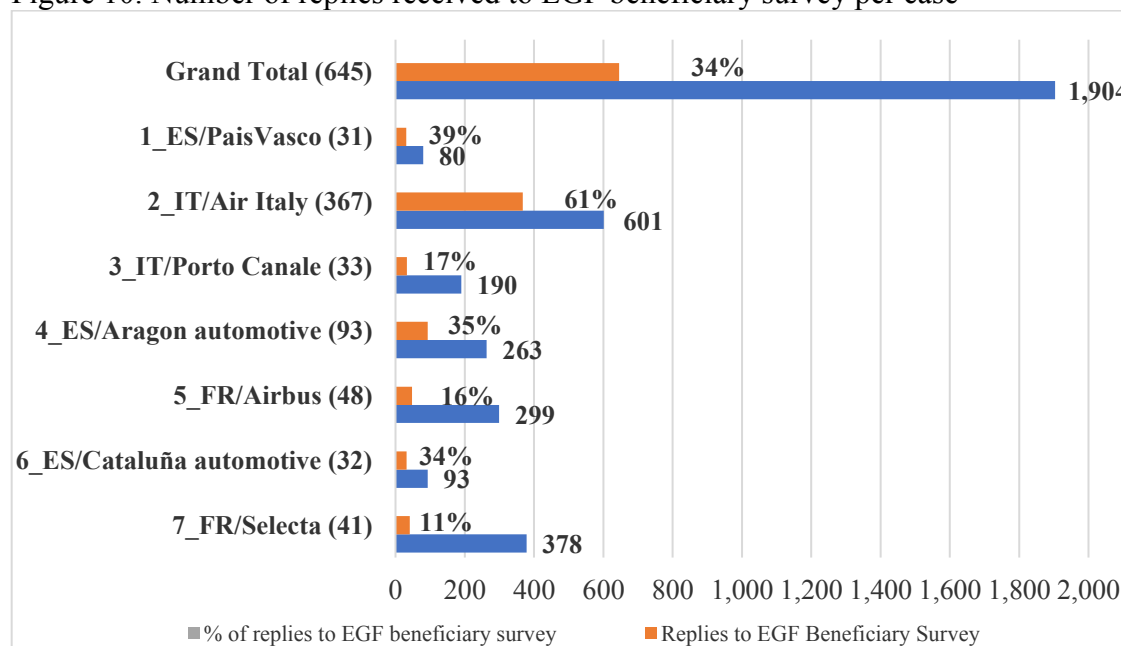
<sup>25</sup> The absorption rate is the percentage of the spending of the EGF co-financing granted.

participate by sending out the invitation to take part and at least one reminder. Member States must also inform the Commission about the efforts made to contact the beneficiaries.

Seven EGF beneficiary surveys were carried out via the EU Survey website in the second half of 2024 for seven EGF cases from 2021<sup>26</sup> which finished implementation.

In total **645 beneficiaries replied** to the seven beneficiary surveys, **representing about 34% of the workers helped**. The average reply rate for individual EGF case ranged from 11% (EGF/2021/007 - France) to 61% (EGF/2021/002 - Italy) (See Figure 10 below).

Figure 10. Number of replies received to EGF beneficiary survey per case



Source: European Commission, DG EMPL.

#### **Profile of the 645 respondents before participating in EGF measures:**

- **Gender:** 35% were women, 64,5% were men and 0.5% non-binary;
- **Age:** 1.4% was below 30 years of age, 62.33% were between 30 and 54 years of age and 36.28% were above 54 years of age;
- **Education level:** 5% have primary education, 40% secondary education, 27% vocational education, 22% bachelor education or above and about 6% replied other;
- **Years of professional experience:** 3% have between 1-5 years, 8.7% have between 6 and 15 years, 20.3% have between 16 and 20 years and 36% have more than 21 years of professional experience;
- **Experienced long-term unemployment:** 50% of beneficiaries did, while 46% did not and 4% prefer not to say;
- **Feel disadvantaged on the labour market:** 50% of the beneficiaries felt disadvantaged because of age, being a parent, education level, location, etc;
- **Employment situation before being displaced:** 89% had permanent contract, while 11% had temporary (fixed term) contracts. The majority of respondents

<sup>26</sup> The seven EGF cases from EGF/2021/001 to EGF/2021/007 (inclusive) are listed in Table 6.

(80%) were satisfied or very satisfied with their previous job, while 8% were dissatisfied.

**After participating in EGF measures**, the beneficiaries confirmed<sup>27</sup> that they:

- a. gained new skills or qualifications (54% of respondents agree), including digital skills (32%)<sup>28</sup> and environmental/green skills (25%),
- b. increased their self-confidence: 48% of beneficiaries agree, while 30% disagreed,
- c. feel better qualified for work: 46% of beneficiaries agree, while 41% disagree/strongly disagree,
- d. feel encouraged to overcome gender-stereotypes in job selection, and/or more aware of gender discrimination in general: 48% of beneficiaries agree, while 30% disagree, and
- e. built new networks of contacts (35%).

More information on the results of the beneficiary surveys received is included in Annex V.

### ***Communication activities by the Commission***

During the 2021–2024 period, to promote exchanges of best practice and provide information about the latest EGF developments, the Commission organised twice per year EGF contact persons’<sup>29</sup> meetings. In 2024, the Commission organised one online networking seminar (aimed at EGF implementers). Until end-2019, the meetings took place in Member States implementing EGF cases. As of March 2020, the contact persons’ meetings took place online because of the COVID-19 pandemic and only since the end of 2022 one meeting in-person took place. The EGF meetings received positive feedback from stakeholders (about 35 participants on average).

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<sup>27</sup> Beneficiaries could select from the following 6 answers: agree/strongly agree, disagree/strongly disagree, do not know, not applicable. When results presented in the SWD explain only the replies showing agreement and disagreement, the other replies refer to the answers “Do not know” or “not applicable”.

<sup>28</sup> Several reasons explain these results: in some cases (e.g. two thirds of the beneficiaries who disagree worked in the air transport sector) where the level of digital skills was already good, no measures was offered, or in case both basic and ad hoc digital training measures were offered, those were not taken up.

<sup>29</sup> Contact persons are nominated by the authorities of the Member States responsible for the EGF. The authority of each Member State decides who will represent it.

## 4. EVALUATION FINDINGS (ANALYTICAL PART)

Considering the limitations and challenges identified in Box 1, a full in-depth analysis of the impacts could not be done at this stage of implementation and will be done for the ex-post evaluation of the 2021-2017 EGF due by 31 December 2029.

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

#### 4.1.1. EFFECTIVENESS

The effectiveness criterion assesses the extent to which the EGF objectives have been met at both instrument and case level. The aim of the EGF is to demonstrate solidarity towards workers made redundant and to ensure for each EGF case that the largest possible number of beneficiaries find sustainable employment as soon as possible. It also analyses the impact of the Fund as a whole. This was done in particular by analysing: (a) the extent to which the EGF manages to ensure sustainable re-integration of redundant workers and the impact of the EGF support on beneficiaries' employability; (b) the availability of support for all eligible beneficiaries; (c) the use of the EGF under the new conditions; (d) monitoring and reporting; (e) factors helping or hindering the achievement of objectives; (f) involvement of companies and social partners; (g) information and communication activities and (h) overall impact and lessons learned from the EGF implementation.

##### a) Re-integration rates, and impact of the EGF support on beneficiaries' employability

The effectiveness of EGF support was measured in the previous programming periods only through the re-integration rates, for which there was no requirement for quantitative re-integration targets in an EGF application, thus making the medium and long-term monitoring difficult. For 2021-2027, the EGF Regulation also could not introduce such objectives<sup>30</sup>, however **the new requirements: specific common indicators** and the **EGF beneficiary survey** provide not only quantitative, but also **qualitative information** for each completed EGF case. This made it possible to also analyse the EGF impact on the general employability of the beneficiaries, and also the quality of the employment found by those beneficiaries re-employed. In what follows, the findings on the re-integration rates and the impact of the EGF support on beneficiaries' employability will be presented.

#### Re-integration rates

In all EGF cases, the main aim was to bring workers made redundant back into sustainable work as quickly as possible. Based on the limited available case data received by the Commission for 7 final reports<sup>31</sup> (out of 17 cases), the EGF has generally been effective in terms of the re-integration rates achieved, with an **average re-integration rate** of around **50%**. The re-integration rate for **beneficiaries** varied between 16% and 71%<sup>32</sup>. This is higher than in the 2007–2013 programming period, and the same as the target of 50% set in the impact assessment for the 2014–2020 EGF<sup>33</sup>. However, it is lower than in the 2014-

<sup>30</sup> The Commission's proposal to set case-specific targets and to include reporting by type of employment was not included in the final agreement of Parliament and the Council on the EGF Regulation for the 2021–2027 period.

<sup>31</sup> Member States report on the re-integration rate in the *final report* of a case, due 6 months after the end of the implementation period.

<sup>32</sup> Commission internal EGF Database.

<sup>33</sup> [Commission Staff Working Paper – Impact Assessment SEC\(2011\) 1130 final, p.33](#)

2020 programming period, when it was 60% (average for 46 EGF cases). However, this result needs to be viewed with caution as the base for analysing the re-intergration rate during the 2021-2024 period is very small, only 7 cases, compared to 46 cases during 2014-2020 and 128 cases during 2007-2013.

The reasons explaining in some cases the re-integration rate for the EGF cases implemented during 2021-2024 are related (to different extents) to: a) late start of the implementation, sometimes intentional, in order to focus only on the displaced workers who cannot find a job on their own; b) the age of the beneficiaries approaching retirement, difficulties in finding a job because of long-term unemployment; c) existing challenges on the labour market at the moment when the EGF measures ended in 2024, such as an increasing trend of more jobs lost than jobs created, inflation, etc.

Comparing the results with previous programming periods has to be done with caution, as two elements, among others, make data less comparable: (1) the implementation period and (2) the moment of reporting on the employment status of the beneficiaries.

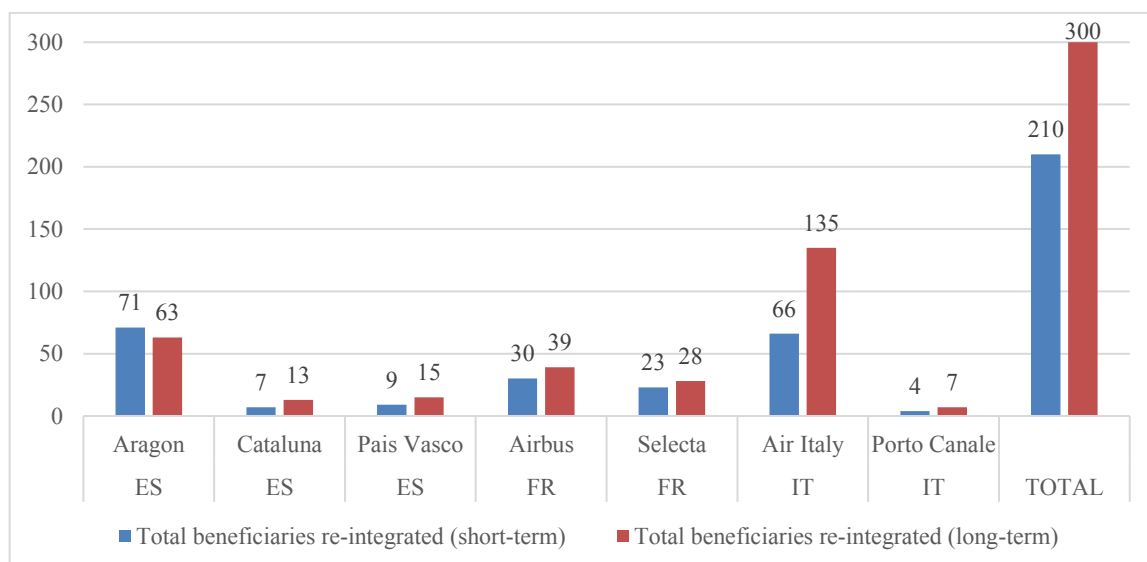
In the case of the implementation period for cases, it was much longer during the 2014-2020 and 2021-2027 periods (24 months or longer if the implementation started early) than in the programming period 2007-2013 (12 months). The results of the longer implementation period show better re-integration rates on average for the 2014-2020 period than in the previous 2007-2013 period, also because of more available time for beneficiaries participating in EGF measures to re-skill, upskill and help them gain new qualifications or improve their education level and ultimately find a new job or start a business. As regards the moment of reporting, during the 2021-2027 period, Member States no longer need to report on the long term employment situation (i.e. 18 months after the end of the implementation period) as it was done during the 2014-2020 period. The only reporting on the employment status of the beneficiaries needs to be sent by Member States six months after the end of the implementing period, no longer after 18 months. Information about the long term employment status is collected during 2021-2027 only via the EGF beneficiary survey, which is carried out six months after the end of the implementation period for each EGF case.

The online EGF beneficiary survey was carried out via the EU Survey website. For seven EGF cases 645 replies were received from beneficiaries, representing 34% of the people helped.

Overall, **in the longer term, the re-integration rates improve**, i.e. beneficiaries who found a new job or started a business. According to the replies from 645 beneficiaries, the re-integration rate increases from 32.5% in the short-term (i.e. 6 months after the end of the last measure they participated in) to 46,5% in the long-term (i.e. more than 18 months after the end of the last measure). **Results improved in most Member States** in the long term, with one case experiencing a decrease in the re-integration rate compared to the short term (see Figure 11 below).



Figure 11. Change in re-integration rates per case (short term vs long term)<sup>34</sup>



Source: Commission analysis of the results from the EGF beneficiary surveys

### Impact of the EGF support on beneficiaries' general employability

The beneficiaries' general employability was analysed on the basis of different sources, such as the final reports, the results of the beneficiary survey and also feedback from the consultation of the implementing EGF stakeholders.

One of the indicators analysing the results of the EGF in terms of the beneficiaries' general employability is the **percentage of EGF beneficiaries in education or training** six months after the end of the implementation period. According to the beneficiary surveys, **178** out of 374 **beneficiaries completed education or training with support of the EGF** such as: re-training, re-skilling, professional re-orientation, language courses, vocational training, training to prepare for recognition of skills through work experience. At the moment of the final reports, 81 beneficiaries (out of 1904) were still in education or training. Findings from the final reports show that people more often opted for short trainings, which might have an indirect impact on their general employability, even if they did not gain a certified qualification through the training. To a limited extent, beneficiaries' participation in a personalised orientation process made them feel more proactive, encouraged them to develop their personal and social skills and had a positive effect on their families.

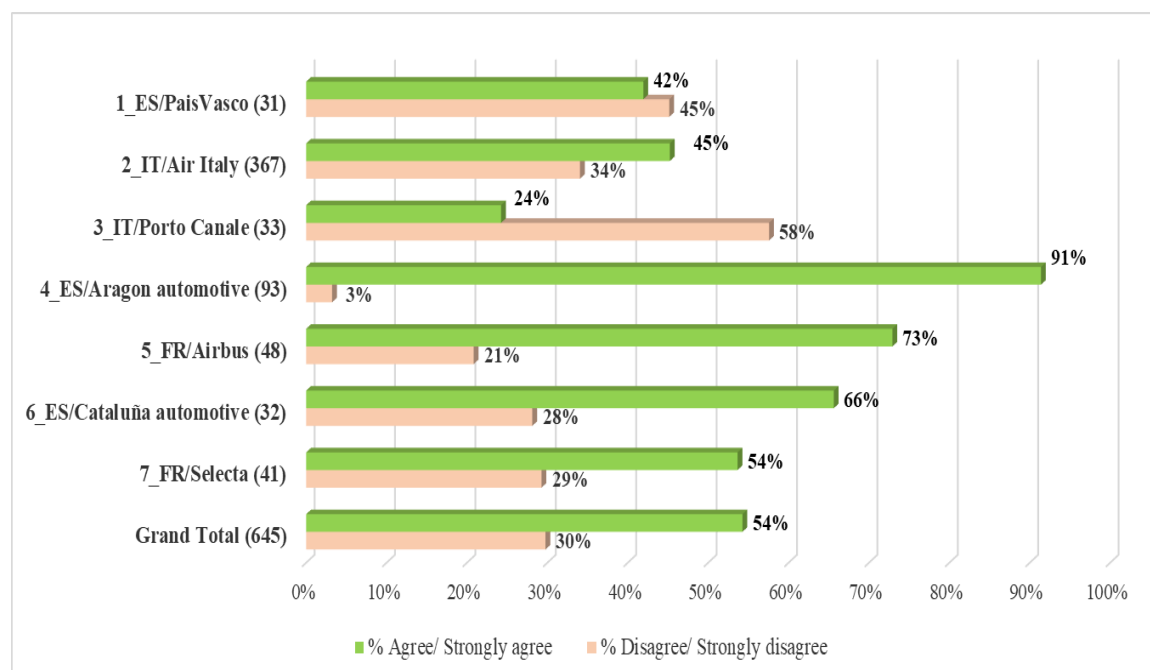
The **EGF also helped improve the education level and gain new qualifications**, albeit to a more limited extent. For example, in the case of EGF/2021/006 ES/Cataluña, 13 people (14% of the participants) increased their education level during the implementing period: 8 people (three women and five men) moved from lower secondary education or less (ISCED 0-2) level up to secondary education or post-secondary (ISCED 3/ISCED 4), and 5 people (one woman and four men) moved from secondary education or post-secondary education level up to tertiary education (ISCED 5-8). In the case of EGF/2021/002 IT/Air Italy, beneficiaries who followed certain trainings gained new qualifications after obtaining the certification, in areas like sustainable tourism, customer management, human

<sup>34</sup> This graph includes all 2021–2024 EGF cases for which both the final report was sent to the Commission. It thus covers 7 (out of 18) cases.

resources management, foreign languages, digital literacy, web computing, digital security and web development training.

Another indicator analysing the results of the EGF in terms of the beneficiaries' general employability is the **percentage of EGF beneficiaries who gained a qualification** six months after the end of the implementation period. According to the beneficiary surveys, **54% of beneficiaries** confirmed that they **developed new skills/gain new qualifications thanks to EGF support** (see Figure 12 below).

Figure 12. Beneficiary who developed new skills/qualifications after the EGF support



Source: Beneficiary survey<sup>35</sup>

The **online EGF beneficiary survey** introduced by the EGF Regulation for the 2021-2027 period, shows for each EGF case that beyond the re-integration rates, the **EGF has broader impacts on beneficiaries' general employability**, such as **new skills or qualifications gained** (54% of respondents), including digital skills (32%), environmental/green skills (25%), and **increased self-confidence** (48%), **feel better qualified for work** (46%), encouraged them to **overcome gender stereotypes** in job selection (30%), and **build new networks of contacts** (35%). These **less tangible, unexpected results** of the EGF support were difficult to measure before 2021, in the absence of an EGF beneficiary survey for each case, and could only be uncovered by the research done for the previous evaluations of the EGF.

The beneficiary survey also gathered information about the labour market situation of the beneficiaries before losing their jobs. This gives a better understanding of the people

<sup>35</sup> Results of the case EGF/2021/003 IT/Porto Canale need to be seen together with the other case from Italy, EGF/2021/002 IT/ Air Italy. Initially the beneficiaries of both cases have received by mistake the link to reply to the same case: EGF/2021/002 IT/Air Italy. Later this was corrected, however, it is believed that from the total of 367 respondents to Air Italy dismissals, some belong to the case Porto Canale, who only received a limited number of replies (33 replies out of 190 people helped). As the replies are anonymous, no separation was possible.

targeted by the EGF support and also of the individual results, thus the effectiveness of the EGF measures. Of the 645 beneficiaries who responded to the survey, 245 found new jobs and 55 started a business. Related to the quality of the new jobs, **most of the new jobs** started were **full-time**, in the same sector and or region as before, and more than half of them worked the same or less hours of overtime as before. The salary level was the same or better for 42% of the beneficiaries who found a job. About 42% of **beneficiaries agreed that the EGF measures helped them find a new job** and 41% consider that the digital skills acquired helped them in the new job.

Another effect of the EGF support was that it **encouraged mobility outside the country or region**, to a more limited extent (for 24% of the new jobs, mostly the previous workers from automotive and air transport sectors).

Of the **55 self-employed**<sup>36</sup> who started **new businesses**, 76% were full-time and 86% were opened in the same region where they previously worked and in the sectors of automobile, retail trade, restauration, coaching, personal development, construction, real estate, tourism, a private English language school, take-over of family business, etc. One beneficiary started a construction firm with 11 employees.

**Level of earnings for the self-employed was generally lower** compared to the previous job, however in **60% of the cases the working conditions were considered better** than before.

Among the EGF beneficiaries who responded to the surveys, the views on **EGF benefits were overall positive**, especially from beneficiaries with increased employability or who found a new job after participating in EGF measures.

**b) Availability of support for all eligible beneficiaries and accessibility to EGF under the broader scope and modified intervention criteria<sup>37</sup>**

One of the objectives of the EGF is to concentrate on the most vulnerable groups, especially disadvantaged, older and young unemployed persons by offering measures to stimulate them to remain in or return to the labour market.

In the EGF application, Member States are required to include information about any specific category of measure for vulnerable groups or people with a longstanding health problem or disability, or members of a recognised minority. Such information is usually collected when the displaced workers sign up for EGF measures and the information about the profiles or backgrounds becomes known.

Examples of good practice were found in French and Belgian EGF cases, with measures tailored to **disadvantaged or vulnerable groups**. In France<sup>38</sup> specific coaching was

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<sup>36</sup> The majority of self-employed were supported in one EGF case with displacements in the air transport sector (EGF/2021/005 FR/Airbus). However a limited number of beneficiaries from this case replied to the survey, thus it is not considered a representative sample for self-employed.

<sup>37</sup> See Footnote 27.

<sup>38</sup> EGF/2022/001 FR/Air France - As regards the redeployment leave ('congé de reclassement'), Article L1233-71 of the French Labour Code provides that a company which employs more than one thousand people is required to propose the measures set out there in for a minimum duration of four months. According to the above-mentioned legislation, the period as from the fifth month is therefore optional and may be subject to a contribution from the EGF in accordance with Article 9(1) of Regulation (EU)

offered to 96 persons with a disability for a longer period, 15 instead of 12 months. Feedback received for the beneficiary survey from 26 persons with disability showed that 74% agreed that the measures were tailored to their needs and that the most useful measures were the allowances, the counselling sessions and the trainings courses. In Spain, special attention is also paid to accessibility in all places linked to the implementation of the project activities (information actions, awareness-raising, etc.) in order to achieve equal participation of persons with disabilities. Belgium<sup>39</sup> includes measures offering financial incentives to every employer of the social economy sector who will employ a worker of 50 years old or more. Another example from Belgium is that for people at risk of poverty they offer collective information on the tax impacts of the change of status from worker to unemployed but also on the prevention of over-indebtedness. Both Belgium and Spain<sup>40</sup>, try to overcome gender stereotypes by offering financial incentives to women participating in training programmes or jobs typically followed or done by men.

The EGF applications provide insight only about the targeted beneficiaries' age group and gender, and a new category of information – the educational level. Across all 18 applications, the majority of targeted workers are male (76.5% of all targeted workers) and in the 30–54 age group (66%). This result is explainable because in most EGF cases dismissed workers came from predominantly male-dominated industries (e.g. such as automotive, transport, warehousing). In most EGF cases, there is no discrepancy between the percentage of men and women targeted and those dismissed.

Based on the information available, the **EGF is flexible enough to provide tailored support to different groups**; in some cases, specific support was included for vulnerable groups. Under the new broadened scope of eligibility and lowered threshold to 200 displacements (intervention criteria), the **EGF is effective in offering support to all eligible beneficiaries**, no matter the cause of the redundancy. The broadened scope and modified intervention criteria are more appropriate and allow a broader, more equitable distribution of resources, making the EGF **more accessible to a wider range of beneficiaries**.

From the written consultation, stakeholders from 21 out of 26 Member States who replied confirmed that the broadened scope and the modified intervention criteria make **the EGF fairer, more inclusive and more accessible**.

### **Shorter deadlines for approval and longer implementation of the EGF**

**Faster mobilisation procedure and shorter deadlines** both for the Commission and the Member States<sup>41</sup> have been one of the changes of the EGF Regulation 2021-2027. At EU level, the total time for adoption of an EGF application from the date of submission by a

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2021/691. Air France has decided to propose this measure for a period of up to 12 months. The 12 months are supplemented by three additional months for senior workers (those born before 1 January 1965), workers with disabilities, and workers belonging to low occupational levels (N1 and N2 in Air France's jobs classification). The EGF co-financing does not contribute in the first four months of the redeployment leave, which correspond to the minimum duration stipulated by law.

<sup>39</sup> EGF/2024/001 BE/Match

<sup>40</sup> EGF/2021/004 ES/Aragon automotive

<sup>41</sup> For Commission: 50 working days instead of 12 weeks to complete its assessment of the application.

For Member States: 15 working days instead of 6 weeks to reply to Commission request for additional information.

Member State until the date of payment was reduced by five weeks, from 29 (2014-2020) to 24 weeks (2021-2027). **Total time for EU level procedures was on average 5.5 months**<sup>42</sup> (reduced from 7.2 months during 2014-2020) for 17 EGF cases from 2021-2024. Another change was calculating all deadlines in working days instead of calendar days.

During stakeholders' consultations the majority of Member States acknowledged as being an **improvement the shorter procedures and deadlines** for adoption introduced during the 2021-2027 period, however, most of them<sup>43</sup> still consider that mobilisation takes too long.

The approval time between a Member State's submission of an EGF application and the budgetary authority's approval (without the 15 working days for the payment) is calculated to 21 weeks for 2021-2027. This deadline was observed in 11 out of 17 cases from 2021–2024, and in 5 of these cases it was shortened to 20 weeks<sup>44</sup>. A longer approval occurred in 6 cases, of which 4 were adopted in 23 weeks, 1 in 26 weeks and the longest took 29 weeks<sup>45</sup>.

The **Commission respected in all cases its legal deadline** for adoption and in **14 out of 17 cases it adopted earlier by 6 days on average** (ranging from 1 to 30 days earlier adoption). The **budgetary authority** kept the same deadline as before of 6 weeks for deciding on the mobilisation of the EGF. In six cases approval was faster than the deadline, while in nine cases it exceeded it.

Some delays were to some extent due to the lengthy and complex application procedure at EU level, but also to other reasons, such as, translation of the application needed if not submitted in English, additional time requested by Member States to reply to Commission, etc.

The EGF was designed as an emergency response instrument. However, its mobilisation is not as quick as it should be, even with the shortened deadlines, thus hindering its effectiveness. Despite this, the delays in mobilisation of the EGF do not mean that the EGF fails to target all the people who would in principle need support after losing their job. Targeting all redundant workers is the regular task of the public employment service or other national authorities. As the EGF aims specifically to target those who need it the most, i.e. the most vulnerable groups of workers made redundant, and to offer this help especially in regions that have been hit particularly hard by restructuring events, these situations on the labour market rather seem to be prerequisites for EGF assistance.

Member States are responsible for the length of the application period and implementation of the EGF measures. In some cases, e.g., when Member States provide sufficient information in the application sent to the Commission, the approval procedures can be sped up.

The method of calculating the **implementation period** was changed to no longer include the time needed for the approval process at EU level, and **the new start date** of the 24 months is from the date of the entry into force of the Financing Decision (i.e. when

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<sup>42</sup> From the date of application until the date of payment.

<sup>43</sup> AT, CY, CZ, DE, FI, HR, HU, IE, IT, LT, MT, PL, PT, SE, SI.

<sup>44</sup> EGF/2021/004 ES/Aragon automotive, EGF/2023/001 BE/Logistics Nivelles, EGF/2023/002 BE/Makro, EGF/2023/004 DK/Danish Crown and EGF/2024/001 BE/Match.

<sup>45</sup> 26 weeks for adoption of EGF/2021/008 EL/ Attica Electrical Equipment Manufacturing due to translation needed of the application and 29 weeks for EGF/2021/005 FR/Airbus due to the end of the year period.

Commission is notified of the adoption by the European Parliament and Council, rather than when the application is submitted), resulting in a full 24-month implementation period for all Member States. A consequence of the change to the start of the implementation period is that the beneficiaries can participate for longer than 24 months in EGF co-financed measures, since the measures began before the mobilisation decision in most of cases. , the **implementation period averages 29 months** in the 7 cases covered in this evaluation, ranging from 6 months to 40 months<sup>46</sup>.

Out of the seven completed cases, in five cases the implementation of EGF measures started earlier than the application date. In **four cases**<sup>47</sup> **implementation started on average 8 months earlier** and in one case it started two weeks earlier. In two cases considerable delays in the start of EGF measures occurred, with 7 months delay in one case and 21 months in the other one<sup>48</sup>, mostly due to the way the cases were managed at national/regional level.

Of the 645 respondents to the seven beneficiary surveys, for 34% of beneficiaries the measures started between one and five months, for 28% measures started between 6-12 months and for 36% they started more than 12 months after being dismissed.

Reasons for delays in the start of implementation are largely country- and case-specific. In practice, some Member States often wait to receive formal approval from the budgetary authority before they start implementing the proposed measures. This is because they lack the financial capacity or the willingness to take the risk of starting implementation before the EGF co-financing is secured. This can lead to significant delays and therefore a shorter implementation period.

#### **c) Use of the EGF by Member States and by beneficiaries under the new conditions**

Overall, not all the funding available under the EGF is used. Between 2021 and 2024<sup>49</sup>, 17 applications were approved, with a total EGF contribution granted of EUR 52.2 million, compared to the EUR 186 million annual ceiling (in 2018 prices) for 2021-2023 and the revised annual ceiling of EUR 30 million (in 2018 prices) for 2024-2027.

Being an emergency relief instrument, the EGF is not expected to fully spend its ceiling. Moreover, it needs a comfortable safety margin in order to be prepared for worst-case scenarios of mass redundancies. During times of stability and economic growth, it is expected that far less than the ceiling is used. As with all emergency relief instruments, it is not possible to accurately estimate the amount of assistance needed in a given year.

However, it is important to consider the reasons why some Member States did not apply for the EGF support and whether there could have been more possible cases. Evidence

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<sup>46</sup> Six months implementation period for EGF/2021/006 ES/Cataluña automotive, and 40 months for EGF/2021/005 FR/Airbus. The 40 months were possible because the Member State started implementing early, with national resources.

<sup>47</sup> EGF/2021/002 IT/Air Italy, EGF/2021/003 IT/Porto Canale, EGF/2021/005 FR/Airbus, EGF/2021/007 FR/Selecta.

<sup>48</sup> EGF/2021/004 ES/Aragon automotive and EGF/2021/006 ES/Cataluña automotive.

<sup>49</sup> The 17 cases analysed include EGF applications received between 2021 and 2024 and approved by December 2024. The remaining one EGF application received at the end of 2024 is not included in this analysis.

collected in the context of this evaluation confirmed previously **identified barriers**<sup>50</sup> and identified a few other issues:

- National economies are doing well and many Member States did not experience great job losses, and/or<sup>51</sup> the labour market is able to absorb the displacements or there is limited institutional capacity<sup>52</sup> or there is limited experience in applying for or implementing EGF cases. This was the case particularly in Central and Eastern Europe and was largely confirmed by EGF contact persons in Member States that did not apply during 2021-2027.
- Even with the changed and much shorter deadlines during 2021-2027, many Member States<sup>53</sup> consider as barrier the lengthy and/or complex procedures for applying and approval of the mobilisation of the EGF;
- In some Member States the threshold of 200 displacements is still considered too high<sup>54</sup>, especially smaller Member States or the ones with limited experience applying for EGF support have difficulties in demonstrating, under the criteria of small labour markets or exceptional circumstances, when the redundancies have a significant impact on the local or regional labour market. One Member State argued that the threshold might be too low compared to the administrative burden (BE - Wallonia);
- A degree of overlap between the EGF and national measures<sup>55</sup>, or with other EU instruments<sup>56</sup> (such as the European Social Fund Plus, Just Transition Fund), which can be made available more quickly and provide more flexibility;
- The EGF co-financing rate is too low (AT, NL, RO) and the need to pre-finance all measures (BE - Flanders, EL, ES). Despite design differences between the EGF and the ESF+, the alignment of the EGF co-financing rate with the highest ESF+ cofinancing rate in the respective Member State, many were reluctant to apply for EGF.
- The timing of the redundancies. Many major redundancies happen over a timeframe longer than what is set out in the EGF Regulation (4 or 6 months) and very often they occur in waves<sup>57</sup>. In order to target most redundancies, Member States might need to submit several applications, depending on the timing of the dismissals;
- Some issues in national legislation that make the use of the EGF difficult (LT);
- The restructuring of the managing authority (SE);
- Lack of agreement between the parties involved in the region, i.e. between regional and local authorities when planning and implementing the project (ES).

Identifying how many other restructuring events might have been eligible for EGF is challenging because of the limited data sources available. The European Restructuring Monitor (ERM) remains the most comprehensive source of data for recorded

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<sup>50</sup> See European Commission (2024), *Report on the 30th Meeting of the Contact Persons of the European Globalisation Adjustment Fund for Displaced Workers (EGF)*.; Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021. The evidence was complements with the feedback to the written survey received in November-December 2024 from Member States EGF contact persons.

<sup>51</sup> CZ, ES, EL, HR, LV, and LT.

<sup>52</sup> BE -Flanders, EL, HU, SI

<sup>53</sup> AT, CY, CZ, DE, FI, HR, HU, IE, IT, LT, LU, MT, PL, PT, SE, SI.

<sup>54</sup> EE, EL, LU, RO.

<sup>55</sup> EL, IE, LU, NL, RO, SI, FI.

<sup>56</sup> CZ, EE, HR, HU, IE, LV, LT, PL, RO and SK.

<sup>57</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021.

announcements of redundancies. Based on the ERM, in the last 10 years the average large scale restructuring (100-999 job losses) across all countries and all sectors lasted: 386.87 days ~ slightly longer than 1 year. However, the timeframe of the redundancies is not always indicated. The ERM could serve as one indicator, but more comparative data are needed to draw conclusions. A few Member States permanently scan the market for new possible EGF cases, but most do not.

### Use of EGF by Member States

The **specific labour market measures and allowances** offered to displaced workers differ considerably in scope and volume for each case, even within the same Member State.

A new requirement in the 2021-2027 period was the **dissemination of skills** required in the **digital age** and in a **resource-efficient economy** to be considered a horizontal element of any coordinated package of personalised services offered. Such measures on digital and green skills have been included in the measures offered in all cases, and have been tailor-made to the needs of the beneficiaries. According to the feedback received during the consultations of the implementing bodies, beneficiaries are profiled before the start of the measures, and measures are adapted accordingly. For example, in Belgium financial incentives are offered to improve digital skills, e.g. to obtain IT literacy. There are also cases when displaced workers already have a high level of digital skills, thus no such measures are needed. This was the case for workers displaced in the air transport sector. As for environmental/green skills, these are offered as part of the packages of measures, but have not been taken up much.

The measures and allowances **most commonly** offered and taken up are set out below <sup>58</sup>.

- **Job search assistance and case management** – this is quite broad, as it includes general information services to workers, career guidance, advisory services, mentoring and outplacement assistance. These measures were offered in 18 applications, targeting in total 20 903 workers, for a total budget of EUR 18.8 million. The results from 7 final reports showed that these measures were provided to about 2 287 beneficiaries, for a total amount of about EUR 1.3 million.
- **Training and retraining** – this was offered in 17 cases and helped 83% of beneficiaries. This measure ranges from trainings on key and horizontal competencies, re-skilling, up-skilling vocational training, on-the-job training to full university degrees and to language courses, etc. A total of 6 888 workers were targeted by this measure, for a total budget of EUR 15.6 million. This measure was provided to 1 589 beneficiaries, for a total amount of about EUR 3.7 million. In terms of education, 13 people<sup>59</sup> increased their education level during the implementing period.
- **Promotion of entrepreneurship** – this was offered in 12 cases and helped 14% of beneficiaries on average. This measure includes guidance and advice for self-employment through workshops, individual assistance in the creation of companies, tutoring meetings and mentoring activities. In total, 1 245 workers

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<sup>58</sup> EGF applications, adopted Commission Proposals and Final reports submitted by Member States.

<sup>59</sup> In the case of EGF/2021.006 ES/ Cataluña automotive, 13 people (14% of the participants) increased their education level during the implementing period: eight people (three women and five men) moved from lower secondary education or less (ISCED 0-2) level up to secondary education or post-secondary (ISCED 3/ISCED 4), and five people (one woman and four men) moved from secondary education or post-secondary education level up to tertiary education (ISCED 5-8).



were targeted, for a total planned budget of about EUR 11.9 million. This measure was provided to 258 beneficiaries, for a total amount spent of about EUR 3.6 million.

- Less commonly used measures are **supported employment and rehabilitation, and direct job creation**. Only the first measure was offered in one case to 500 beneficiaries with spending at EUR 0.44 million. Direct job creation was not offered to any beneficiary. The first measure was offered in one EGF case and helped 37 beneficiaries (of 500 targeted), for EUR 32 350 spent. In most cases, this relatively low rate was due to people finding a job without support, or a lack of interest to participate due to low willingness for change.
- **Allowances** offered were mainly **job search allowances, training allowances, subsistence allowances and mobility allowances**. Job search allowances were targeted at 4 681 persons across 11 cases, training allowances at 1 829 persons across 9 cases, mobility allowances at 953 persons across 6 cases, and subsistence allowances at 591 persons across two cases. **Other allowances** were offered to 1 811 persons in 11 cases for: (a) **bonus for improving IT skills and language skills, return-to-school allowance, hiring incentives** (consisting of pay subsidies to encourage local companies to hire EGF beneficiaries), (b) **contribution to the accommodation and commuting expenses** incurred when participating in training, (c) **salary top-ups**, to encourage beneficiaries to accept new employment, even if the salary of the new employment found is lower than in the previous job, (d) **contribution to expenses for carers of dependent persons** for workers with caring responsibilities (children, elderly or disabled persons), (e) **tutoring after reintegration into work**, workers reemployed are guided during the first months to prevent possible problems arising in their new jobs, (f) **contribution to moving and installation costs**.

As for **beneficiaries helped**, job search allowances (670 workers helped) had the highest number followed by training allowances (216 workers helped), other allowances (172 workers helped) and mobility allowances (27 workers helped)<sup>60</sup>. The main reason for the low take-up of mobility allowances is the low willingness for mobility among beneficiaries. The results of EGF cases in which subsistence allowances were offered were not available at the time of drafting of this document.

The EGF is complementing regular measures by increasing the level of aid, as confirmed by the stakeholder consultations. In many cases, EGF assistance removed barriers to participation in regular (or EGF) measures as assistance was offered for travel, accommodation, childcare or course material facilities. This was also confirmed by the evidence collected from the EGF beneficiary surveys.

### Use of the EGF for beneficiaries

Case research, including seven beneficiary surveys, identified considerable differences across EGF cases and Member States in the rate of beneficiaries helped (defined as the ratio of persons assisted over the number of persons targeted). The differences are mostly due to case-specific or country-specific factors. The take-up of EGF measures by

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<sup>60</sup> The total amounts spent for each type of allowance were: EUR 0.8 million for job search allowances, EUR 0.57 million for other allowances, EUR 0.22 million for training allowances, about EUR 77 220 million for mobility allowances.

beneficiaries is largely dependent on personal and contextual circumstances, although the way in which the measures are designed and implemented also play a role. The reasons that led to fewer people participating in the measures offered are re-confirming the findings from previous evaluations<sup>61</sup>:

- strong national/local support systems that reduce the need for additional EGF support;
- strong labour markets enabling quick re-integration without EGF support;
- generous compensation and training opportunities offered by the dismissing company;
- finding a job sooner than expected; highly-skilled people did not require much support;
- personal reasons for beneficiaries not wanting to take part (e.g. poor public transportation possibilities, caring for family members, etc.);
- delays in the start of implementation of EGF measures (so that beneficiaries had already found employment – this also implies, however, that EGF assistance might not have been needed);
- lack of awareness that measures actually exist (implying that the national authorities were not able to identify possible beneficiaries, and/or did not put enough effort into guidance measures); and
- measures not being regarded as useful (implying that the package of measures was designed without closely involving the beneficiaries).

In total, across the 7 finalised EGF cases, 1 904 beneficiaries have been assisted. The rate of beneficiaries helped to those targeted ranged from a low of 20% to a high of 103%<sup>62</sup>.

The beneficiary survey introduced by the EGF Regulation could provide for the first time on a case-by-case basis more information than in previous programming periods, not only on the specific characteristics of the beneficiaries targeted such as gender, age group and educational level, but also on the quality of the previous jobs they had, for how long they had been unemployed before starting the EGF measures and their perception over their own capacity to get another job. The surveys also give a qualitative and more in depth view on the opinion of the beneficiaries after participating in EGF measures. Findings uncover details on the the most popular and useful measures taken up by beneficiaries, the situation of the beneficiaries on the labour market during a longer timeframe, and their perception on their own employability and the quality of the new job found. See more details in Annex III.

As explained above, the results of the seven beneficiary surveys indicated that the EGF support was perceived as effective by most respondents and that the support they received was tailored to their needs (62% of respondents). Dissatisfaction rates are case-specific, and also vary widely within countries. Most of the reported dissatisfaction stems from the fact that measures offered turned out not to be of the expected quality, or the bad timing or

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<sup>61</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021.

<sup>62</sup> 20% (EGF/2021/006 ES/Cataluña automotive) and 103% (EGF/2021/007 FR/Selecta). Reach rates of more than 100% can be attributed to additional workers being made redundant after the application deadline. Such people can (under certain conditions) still be included for support if this can be achieved within the agreed budget. Source: Final reports of EGF cases.

location too far away of the measures offered. However, in a few instances, a mismatch between the measures offered and beneficiaries' needs hindered participation<sup>63</sup>.

In the 18 EGF applications, out of 10 825 persons targeted workers, 8 286 were men. The gender equality perspective in EGF cases had been addressed in a study for the European Parliament's Committee on Women's Rights and Gender Equality<sup>64</sup>. As mentioned in previous evaluations of the 2014–2020 EGF, the figures reflect the gender segregation of jobs, and the fact that industries prone to larger restructuring because of globalisation, especially automotive, metalworking industries, manufacture of basic metals are predominantly male industries. However, this is case-dependent. There are also cases from the retail sector or air transport with a far larger number of female workers made redundant than men.

#### **d) Monitoring and reporting**

Under the 2021-2027 EGF Regulation, Member States send to the Commission a **final report** 7 months after the end of the personalised measures, indicating the case's outcome, **includes** not only the **beneficiaries' employment status**, but also some **qualitative information**, such as the qualifications gained at the end of the operations. In the previous periods reporting was limited to the number of beneficiaries helped, broken down by gender and age, and to the categories of workers, including their employment status. During 2014-2020, Member State needed to send a long-term report on the employment status of the beneficiaries 18 months after the end of the implementation. This long-term report was removed for the 2021-2027 period, as it was considered burdensome by Member States.

During 2021-2027, the reporting on the beneficiaries has been changed to better monitor implementation and measure impact as follows: (a) **the common output indicators** (the number of beneficiaries helped, broken down by gender and age and education level) and (b) new requirements have been added: i) **common long-term indicators** and ii) a **beneficiary survey** for each case<sup>65</sup>.

The indicators do not have a baseline, targets nor milestones. The number of targeted beneficiaries as specified by the Member State concerned is not considered as baseline, as some Member States target only the redundant workers with little chance of successfully achieving job transition without targeted and specific support, while other Member States target all redundant workers.

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<sup>63</sup> Based on results of the beneficiary surveys for the seven completed EGF cases, reconfirming the findings of previous evaluations of the EGF 2014-2020. Mid-term evaluation of the EGF 2014-2020, SWD(2018) 192/16.5.2018, p.30; Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.31.

<sup>64</sup> [European Parliament \(2016\), Assessment of the European Globalisation Adjustment Fund from a gender equality perspective, p. 13 and 34.](#)

<sup>65</sup> The **common output and long-term indicators** are: 1) the total EGF beneficiaries in a given case, 2) beneficiaries by gender (female/male/nonbinary), 3) beneficiaries by age group (below 30 years/above 54 years), 4) beneficiaries by education level (with lower secondary education or less/with upper secondary or post-secondary education/ with tertiary education), 5) percentage of EGF beneficiaries in education or training, 6) beneficiaries by employment status (unemployed/inactive/employed (dependent)/self-employed) and 7) percentage of EGF beneficiaries who gained a qualification by six months after the end of the implementation period.

The **beneficiary survey** collects data on the perceived change in the employability of beneficiaries, or, for those who have already found employment, on the quality of the employment found. It is carried out for each case via the EU survey webpage. Six months after the end of the implementation period of each case, Member States are responsible for disseminating to the beneficiaries the link to the survey and later sending one reminder.

According to stakeholders from seven implementing Member States, the views on the new requirements are different. For some Member States these do not appear to be significantly more demanding than those of similar programmes (Denmark, France, Spain) or are more simplified than other instruments (Greece). On the contrary, Belgium<sup>66</sup> and Italy<sup>67</sup> consider that the new reporting obligations are more significant than for the ESF+, while for Germany the funds are not comparable in terms of reporting.

Considering the above, the new reporting requirements have **improved monitoring of the EGF effectiveness**.

As in previous funding periods, there are no requirements for quantitative re-integration objectives in an EGF application, which makes it difficult to measure and monitor the effectiveness of EGF support, because there is no baseline against which results can be compared. .

Findings from the final reports reconfirm that progress on case-specific objectives continues to be poorly monitored by Member States<sup>68</sup>. In many cases there are no specific systems to keep track of the results beyond the end date of the EGF measures. Among the reasons for this are privacy concerns<sup>69</sup> (related to GDPR) or most often because only the minimum information is collected for the employment status report..

Monitoring project visits by the Commission have usually been done on site once for each case in the middle of the implementation period to see the preliminary results and also to discuss and advise Member States on potential issues related to the implementation. Following such visits, the Commission provided further information about the implementation in the form of a report which also constituted a useful source for past evaluations. Due to the prolonged restrictions post COVID-19 and the limitation to travel for Commission staff, the 2021-2024 EGF cases could not be monitored on site, but only remotely in some cases. No reports were created and thus this source of information was not available for the mid-term evaluation. Such visits are planned to resume in 2025.

#### **e) Factors helping or hindering the achievement of objectives**

The qualitative analysis of the information available was primarily based on the case reports and written consultation of the implementing case stakeholders. It confirmed the factors already identified in the ex post evaluation and the Commission's biennial reports, and added additional factors.

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<sup>66</sup> There are more controls (5 authorities control the EGF systematically while 4 authorities control the ESF non-systematically) and more extensive (more than half of the total expenditure of each EGF case is checked while this is not systematically the case for the ESF+). In terms of internal administrative management at Member State level, the EGF requires more staff than ESF+.

<sup>67</sup> Checks are carried out more frequently and rigorously than the broader checks carried out under the ESF+ and the European Union Solidarity Fund.

<sup>68</sup> Final reports of EGF cases.

<sup>69</sup> GDPR or General Data Protection Regulation, *OJ L 119, 4.5.2016*.

The **success factors**<sup>70</sup> contributing to the effectiveness of the EGF are:

- The Member State's past experience in EGF implementation and the institutional capacity to adopt a coordinated approach with all relevant stakeholders seems to be an important success factor. The success of EGF cases also benefits from building on existing partnerships and delivery structures for employment and social policies, together with a solid social dialogue.
- Tailored measures to the individual needs of beneficiaries. The EGF allows for intensive, individualised support, usually much more than national or regional measures. Member States can experiment via the EGF with innovative measures and, if proven successful, they integrate them into the regular measures of national or local authorities or of the dismissing enterprise.
- Availability of support services in close proximity to the target group. For example, in Spain and Belgium EGF offices and reconversion units were set up in locations close to the target groups.
- Provision of support by a small group of implementers with a better understanding of the needs of the target group (Spain).
- Background of workers and willingness to actively participate in EGF measures. Workers with higher levels of education or with more versatile and transferable skills are likely to find new employment faster than the lower skilled.

The **new** success factors identified stemming from the changes introduced in the EGF Regulation for 2021-2017 are:

- lowered minimum level of redundancies to 200 people made the EGF more accessible;
- increased duration of support to two years after validation of the application by the EU;
- co-financing rate aligned to the highest ESF+ rate in the respective Member State;
- simplified application procedures by eliminating the need for Member States to demonstrate the link between the displacements and globalisation or any financial and economic crisis, and replacing it with a brief description of the events that led to a large-scale restructuring having a significant impact on the local or regional economy;
- the involvement of the most representative social partners in the sector (trade unions and employers' organisations) in the design and implementation of the project's measures. This favours the implementation of the project as well as the adequacy of the measures to the needs of the beneficiaries.

All these success factors reinforce the idea that personalised, individualised support services are highly beneficial for finding a quality job. However, success factors are largely case-specific, and there are factors that cannot be controlled, such as the economic situation in the country/region, the supply and demand for labour and the unemployment rate.

Factors **hindering the effectiveness**<sup>71</sup> of the EGF are:

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<sup>70</sup>Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.33.

<sup>71</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.34.

- Issues related to the profiles of beneficiaries, e.g. age, low levels of education or limited knowledge of the local language. Age is a commonly reported factor hindering the reach of the EGF. Older people face greater challenges than younger people in terms of reintegration into the labour market. Redundant workers close to retirement age tend to be less inclined to participate in EGF measures. This is the case when they are eligible for early retirement or for generous unemployment benefits to bridge the gap until retirement, or when their job loss had a considerable impact on their mental state and their self-confidence in being able to secure a new job.
- Difficulties in reaching and activating redundant workers. In many Member States, privacy issues have made it difficult to reach the specific people who are going to be dismissed, as in some cases (mainly sectoral) enterprises do not disclose the information about these workers.
- Workers' low willingness for mobility and change. Depending on the case specifics, reasons for this included proximity to the work place and home, scepticism about the EGF project, reluctance to switch career paths, and workers' rigid expectations regarding their potential new job. Member States partially mitigated these challenges with workshops focusing on willingness for change and mobility and also with travel grants.
- Problems and delays with designing and implementing EGF measures, the selection of implementing partners and in procurement of training courses; submission of an application long after the reference period for redundancies; long and complicated national procedures; weak institutional capabilities and design of policy instruments; limited cooperation between stakeholders and capacity to implement innovative measures of interest to beneficiaries.

The **new** hindering factors identified during for the 2021-2024 period are:

- Lack of awareness of the Fund, including at institutional level.
- The institutional difficulty of managing an additional fund, besides the other instruments, such as the ESF+, Just Transition Fund (JTF), Recovery and Resilience Facility (RRF).

#### **f) Involvement of companies and social partners**

As already identified in the previous evaluations of the 2014–2020 EGF, notable success factors for EGF cases included the development of effective partnerships and appropriate delivery mechanisms, strong cooperation between the delivery partners, including social partners, and a coordinated approach<sup>72</sup>. This was largely confirmed by the supporting study for the ex post evaluation of the EGF 2014-2020 through case research.

As confirmed by previous evaluations<sup>73</sup>, the involvement of social partners and companies in the design and implementation of EGF measures was helpful in reaching (potential) beneficiaries, as their contact details are otherwise not known.

The degree of involvement of social partners and companies in the design and provision of coherent support packages varies across Member States and cases, as it is largely based

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<sup>72</sup> Mid-term evaluation of the EGF 2014-2020, SWD(2018) 192/16.5.2018, page 23; Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.35.

<sup>73</sup>Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.36.

on their regular support systems. Some examples from case studies showed that either social partners are involved early on in the restructuring negotiations, with the public employment service coming in as a secondary actor, or companies laying off workers are required by law to be involved in implementing active labour market measures, which they contribute to both financially and with personnel.

Generally, it is clear that the involvement of former employers boosts the effectiveness of EGF cases, by providing beneficiaries with information and measures for them to get back into the labour market as soon as possible.

The involvement of social partners is also generally very well received by both Member States and beneficiaries.

#### **g) Information and communication activities**

The EGF Regulation requires Member States to provide information on and publicise the funded actions, highlight the role of the EU, and ensure that the EGF contribution is visible. It also requires the Commission to maintain and regularly update an internet website, provide information on the EGF, and provide guidance on the submission of applications, as well as information on all applications.

At Member State level, for successful communication on the EGF cases, all relevant stakeholders at national, regional and/or local level need to be aware of the opportunities available from the EGF. Findings showed, however, that in some Member States not all relevant stakeholders are aware of the EGF and its potential benefits. In other Member States, there is higher awareness of the EGF if social partners participated in delivering some of the measures.

The survey of 20 Member States who did not apply for EGF support during 2021–2024 found that there is a generally reasonable or good level of knowledge about the EGF at Member State level (CZ, MT, PL, SI), even in some cases at the levels of workers' organisations, implementing bodies, policy makers and social partners (BE, CY, DE, EE, ES, IT, FI, HR, HU, IE, LT, LV, PT, SE), however the level of knowledge is low at the level of workers made redundant or at risk of being made redundant. Some Member States (FR, PL, RO, SE) expressed the view that more can be done to raise awareness of the EGF. The same results emerged from the survey to EGF beneficiaries. The main objective of the communication activities is to inform participants about the EU intervention. This is usually done during or after implementation because in the initial stages (i.e. before formal approval from the budgetary authority), the measures are implemented using national funds and there is little visibility of the EGF.

The Member States are responsible for providing information about the EGF and choosing the best suited communication actions. However, this is not done to the same degree in all cases. While many Member States have created dedicated EGF websites to provide information about every EGF project and the workers are informed about the role of the EU in the support they receive, results from the final reports show that Member States were consistently underspending the budget planned for information and publicity activities. In some cases the information and publicity costs were absorbed by the Member States outside of the EGF framework, or costs were simply lower than expected.

Feedback collected from the beneficiaries surveys showed that overall awareness that the measures they received were co-financed by the EGF has improved compared to previous

periods. Nonetheless, there is still room for improvement of the usefulness and effectiveness of communication activities. About 80% of respondents were aware that the measures they received were co-financed by the EGF and or EU, while 20% were not aware of it.

At EU level, the EGF website<sup>74</sup> is constantly updated with information about EGF applications received since 2007, EGF publications (the biennial report, the frequently asked questions, press releases, etc.), events and news. Once or twice a year, the Commission organises EGF contact persons meetings online and in-person and EGF networking seminars, to provide information about the latest EGF developments, to promote exchanges of best practice and to discuss issues of common interest. Due to COVID-19 there were no in-person meetings organised between 2020 and November 2022, but only online meetings of the contact persons. The meetings in persons re-started in November 2022 and have since taken place once per year. The EGF networking seminars have not been organised in person since 2019. Views on their usefulness and effectiveness, however, remain mixed. The majority of Member States consulted are of the opinion that the EGF meetings and networking seminars are useful, as they allowed for knowledge sharing, and cross-fertilisation of new ideas and experiences, but are not used to their full potential. Some Member States said that Commission's communication activities were useful for the relevant EGF stakeholders, however they did not reach Union citizens.

#### **h) Overall impact of the EGF and lessons learned**

Overall, findings show that thanks to the new monitoring and reporting requirements it has become easier to draw conclusions about the impact of the EGF. However, challenges related to drawing robust conclusions still persist, especially at case level where implementation and results depend heavily on the specificities of the labour market and the target group, and because the results are not monitored and reported on in an accurate and comparable way. Nevertheless, evidence indicated a clear positive impact.

The EGF has shown solidarity towards workers, and supported them in finding sustainable employment. It has been successful in providing targeted emergency support adapted to the needs of dismissed workers, while ensuring enough flexibility for the support to be integrated into Member States' national systems, including through highly individualised and tailored support measures. A high number of beneficiaries have been re-integrated into the labour market, and even those who were not, have still likely gained new skills, qualifications or social networks. Through one or more EGF cases Member States gain experience and use the lessons learned from the design and implementation to improve support to workers in the future EGF applications. In Member States with previous experience and delivery mechanisms, the EGF serves as a tool to test innovative measures, which could later be mainstreamed in employment and social policies.

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<sup>74</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)



Through the EGF a targeted, tailor-made and individualised support is offered to the beneficiaries, putting them in a more favourable position than people who did not benefit from EGF support to re-enter the labour market<sup>75</sup>.

#### 4.1.2. EFFICIENCY

The efficiency criterion analyses to what extent the costs associated with the implementation of the Fund were justified considering the results (cost-benefit analysis). At instrument level, the length of the decision-making process is looked into as an indication on the procedural efficiency of the fund, and in view of overall data limitations. It also analyses if there are any inefficiencies or unnecessary burdens at case or instrument level that should be addressed to improve the Fund's efficiency in the future. The analysis was made at both case and Member State level via written consultations, an online seminar and an in-person meeting.

The actions covered by the EGF are, by definition, not programmable because restructuring events giving rise to the redundancies are unexpected. Therefore, defining in advance how many mass redundancy events will take place in any given year and what would be the profile of beneficiaries is not possible for the EGF. Also, estimating the exact number of people who will sign up for EGF measures, the type and duration of measures needed, and how much of the planned budget for the package of personalised services will be spent is difficult when Member States draft the application for EGF support.

##### a. Efficiency at case level

**The cost-efficiency of the EGF** considers the degree to which the costs incurred are proportionate to the results (i.e. the number of beneficiaries helped, the number of beneficiaries re-integrated, percentage of beneficiaries in education or training and who gained a qualification and long-lasting effects on beneficiaries' general employability). Overall, no concrete conclusions could be drawn on the cost-efficiency per beneficiary, because the resources spent per case, and the number of beneficiaries helped and who re-integrated the labour market as a result, differ considerably by case, sector and Member State. Comparing results across cases is irrelevant because of the specificities of each case. Most respondents (85% of the implementing Member States to the Commission's written consultation believed that the same results could not have been achieved with less resources or in a shorter period of time.

The absorption rate (the percentage of the spending of the assistance granted) is looked into when analysing the resources used, however it does not reflect the cost-efficiency at case level, it has no case-specific target and cannot be considered a performance indicator. **The average absorption rate<sup>76</sup> of the 7 EGF cases was 63%**, with the lowest observed

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<sup>75</sup> *Study supporting the ex post evaluation of the European Globalisation Adjustment Fund (2014-2020)*, p. 13, <https://op.europa.eu/en/publication-detail/-/publication/ceb95383-a24f-11eb-b85c-01aa75ed71a1>.

<sup>76</sup> The absorption rate is the percentage of the spending of the assistance granted.

rate being approximately 8.1%<sup>77</sup> and the highest 100%<sup>78</sup>. The absorption rate varies significantly between Member States (see Figure 13 below), sectors, cases and different measures and activities.

Reasons for discrepancies include:

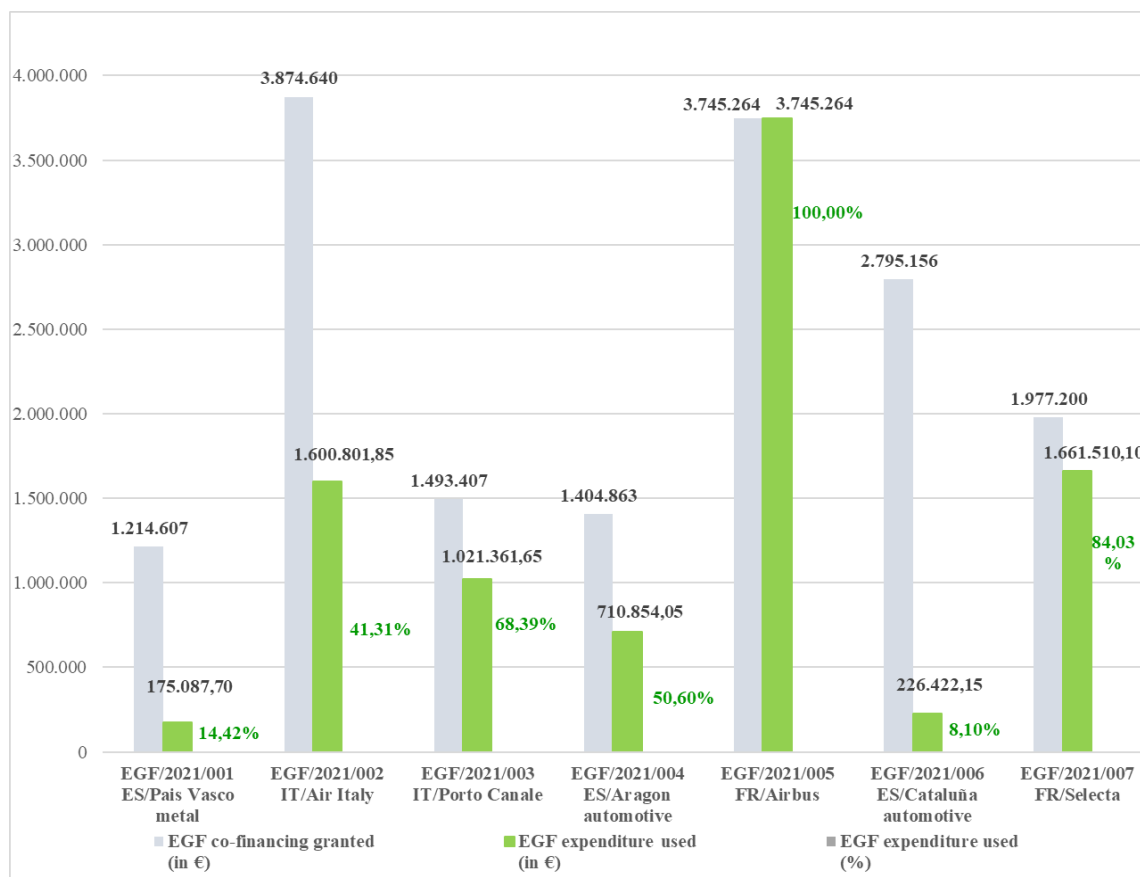
- an overestimation of budgets by Member States and the inclusion of high safety margins due to insufficient information on the profiles and needs of potential beneficiaries during the planning stages;
- an overestimation of interested beneficiaries or unforeseen changes (e.g. workers finding a new job on their own, especially when there are delays in implementation);
- more available funding at Member State level than initially expected, deciding during implementation to use only national funding for some measures, resulting in less EGF co-financing being used;
- late start of the implementation of EGF measures;
- lower training cost per participant, as the workers opted for modular training of short duration.

Figure 13. Absorption rate per each EGF case

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<sup>77</sup> The absorption rate in this case (EGF/2021/006 ES/a) was 8.1%. The absorption rate was this low because of: (1) the lower than anticipated number of participants, 93 instead of 450, that is 20% of the estimated participants, likely due to the late start of the measures. (2) The training measures (40% of the total budget for measures) were not implemented. Workers participated in training that is part of the regular offer of the public employment service, so no EGF amount was certified. (3) many measures that were not carried out (contribution to business start-up and the allowance for on-the-job training). (4) the actual average cost per worker (€1,250) is less than one-fifth of the budgeted average cost per worker (€7,000).

<sup>78</sup> EGF/2021/007 FR/Selecta.



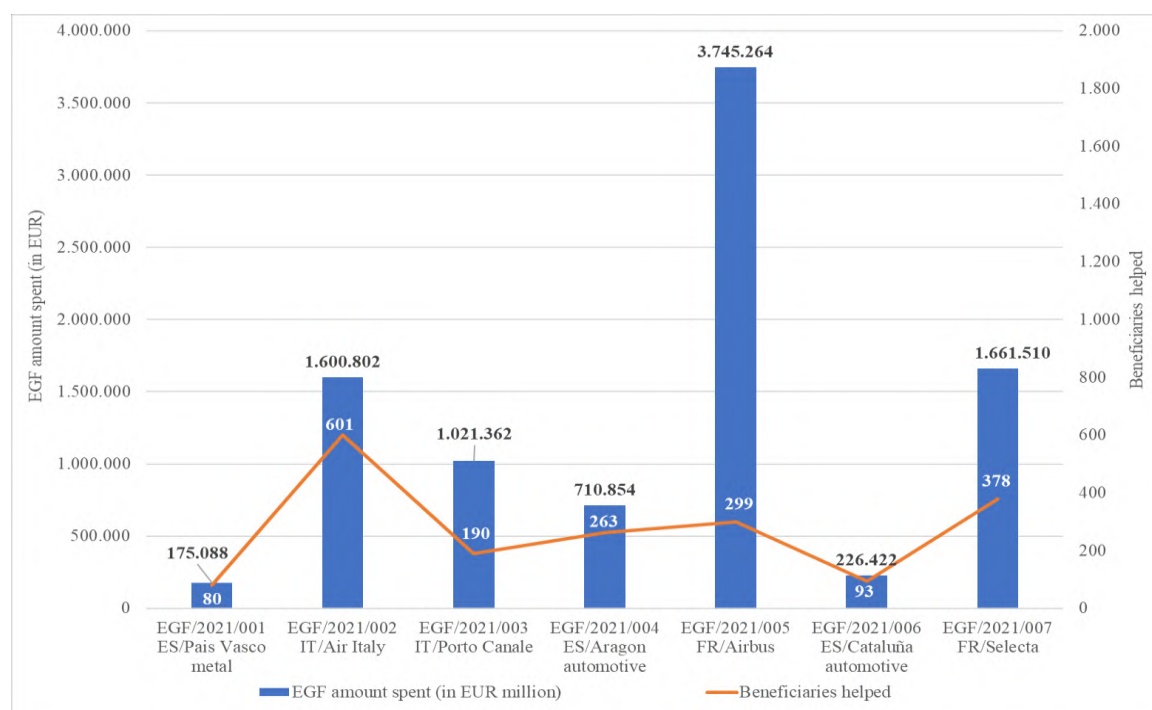
Source: European Commission, EGF Database.

In all but one of the seven cases, the actual cost per worker was lower than initially planned. From the comparison of the absorption rate of EGF funds (the percentage of the spending of the assistance granted) and the rate of beneficiaries assisted to beneficiaries targeted, it was clear that **the large majority of cases were more cost-efficient than initially planned**. In other words, in 85% of EGF cases, each euro of EGF funds helped more people than planned in the initial budget. In addition, during previous evaluations evidence from the RHOMOLO-IO simulations<sup>79</sup> performed on 23 EGF cases from 2014–2015, which suggests that the Fund has positive indirect effects, as each additional job created influences other sectors positively. The findings were that the dimension of these indirect impacts varies across case studies, ranging from a minimum of 20% up to 50% of the total jobs generated. A similar simulation could not be performed for the limited number of completed cases during the 2021–2024 period.

**At Member State level**, after comparing the total EGF amount spent per case against the number of beneficiaries assisted, it was found that the general trend is that more beneficiaries were assisted in cases that received more EGF funding. A higher number of beneficiaries requires more financial resources, however this is also applicable when the particular needs of the beneficiaries require more intensive or complex and costly training. (see Figure 14).

<sup>79</sup> [JRC \(Joint Research Centre\) Technical Report, The RHOMOLO-IO modelling framework: a flexible Input-Output tool for policy analysis \(2019\)](#)

Figure 14. Relationship between total EGF amounts spent and number of beneficiaries helped<sup>80</sup>



Source: EGF Database

The analysis of the EGF final reports and the results of the beneficiary survey shows that a higher cost per beneficiary is influenced by the cost of the measures, by the number of participants, but also by the duration of the measure. Variations in cost-efficiency result from a range of factors. These include the scale of the layoffs, the labour market situation, the targeted beneficiaries' individual circumstances and skills, alternative measures already provided by the Member State, the services' cost, the number of beneficiaries helped and how easy or difficult it was for them to be re-employed after participation in EGF measures. This was also noted by the Commission in its 2017, 2019 and 2021 biennial reports on the EGF.

**At sectoral level**, no comparative analysis is possible. The average cost per beneficiary at sectoral level varies considerably, with the clear outliers being the sector of manufacture of transport equipment (an average cost of EUR 12 526 per beneficiary for starting new businesses<sup>81</sup>) and metalworking industry (average cost of EUR 2 189 per beneficiary<sup>82</sup>). In some cases, cost savings resulted from networks and processes already established from previous EGF cases.

<sup>80</sup> The number of beneficiaries helped in this graph is based on the results presented in the final reports (7 months after the end of the implementation period). It thus covers the seven cases for which a final report was submitted to the Commission before 31 December 2024.

<sup>81</sup> In the case of EGF/2021/005 FR/Airbus most measures offered were for creating a new business, which has a contribution up to EU 22 000 according to the EGF Regulation. Therefore, we cannot speak of a correlation between the cost per beneficiary helped and the sector.

<sup>82</sup> Final report of EGF/2021/001 ES/Pais Vasco metal.

Case research did not reveal any correlation between the level of absorption and the re-employment rate. This re-confirms similar findings from the *ex post* evaluation of the 2007–2013 EGF<sup>83</sup>.

As the mid-term and the *ex post* evaluations of the 2014–2020 EGF pointed out, the case studies also showed that many of the implementation costs (i.e. managing and monitoring costs) are fixed, independently of the size of the case. The reporting of such expenditure as a percentage of the total of the overall EGF assistance granted is frequently seen by Member States as not giving a fair picture. This is because smaller cases that incur more or less the same costs as larger ones inevitably look ‘inefficient’ as the percentage of implementing costs is a higher part of the total.

Evidence suggests that there is room for efficiency gains. The main inefficiencies are related to processes or procedures at national and/or regional level, which lengthen the timeframe. Some examples of inefficiencies are issues with the procurement of training courses or partnerships established with delays.

As a general rule, EGF assistance is more costly than regular national measures. However, according to the final reports and employment status reports for the EGF cases, EGF assistance leads to higher re-employment rates. An educated judgement as to whether additional costs are justified or not would also require further study of the societal costs of lower re-employment rates. This was also confirmed by the mid-term evaluation of the 2014–2020 EGF<sup>84</sup>.

#### **b. Efficiency at instrument level**

Most stakeholders who responded (85% of the implementing Member States) to the written consultations acknowledge the shorter deadlines for application and approval, however they still consider that the **decision-making process is lengthy and complex**. Despite this, efficiency improves the more applications a Member State submits, thanks to lessons learned. There is little scope to reduce the length and complexity of the application process, as long as the same approval by the budgetary authority is required. The Regulation covering the 2021-2027 period imposed shorter time limits for the Commission to process the applications (15 weeks instead of 20), while maintaining the same deadline of 6 weeks for the budgetary authority to approve.

On average, across the 17 EGF cases approved during the 2021–2024 period, the process from the Member State’s application until approval by the budgetary authority took **5.5 months**<sup>85</sup> a decrease, as compared to **from 7.2 months during the 2014-2020 period**. The shortest period for approval by the Commission was 104 days (3.7 months) and the longest 168 days (5.7 months)<sup>86</sup>. Commission adopted in 14 out of 17 cases earlier than the deadline, on average by six days. Approval by the budgetary authority took an average of 43.5 days (six weeks) for the entire process. **The six-week deadline** was exceeded by the

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<sup>83</sup> [EGF ex-post evaluation 2007-2013 \(2015\)](#), p. 83. The rates of expenditure per beneficiary and the outcomes achieved were compared with previous EGF cases implemented in the same Member State.

<sup>84</sup> Mid-term evaluation of the EGF 2014-2020, SWD(2018) 192/16.5.2018, p. 33, Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.40.

<sup>85</sup> The 15 working days deadline for processing the payment is not included in this calculation.

<sup>86</sup> For this case, translation of the application was needed from Greek to English (see Article 8(4) of the EGF Regulation), and this took 4 weeks. However, this cannot be considered a delay.

budgetary authority in 9 out of 17 cases, however it was met or even shortened in the remaining 8 cases<sup>87</sup>.

The **simplification of the application** by eliminating the need for Member States to demonstrate the cause of the redundancies was also introduced by the 2021-2027 EGF Regulation. This change has **significantly increased efficiency** and also made shorter deadlines possible. Feedback received during the break-out sessions with stakeholders from the Member States implementing cases during 2021-2024, viewed this change as very positive as they considered that the applications are now easier to fill in the applications than before.

The **changes of the 2021-2027 EGF Regulation** related to the shortening of the length of procedures and the simplification of the application **have improved efficiency**. However, even with shorter deadlines for the Commission and Member States and without the need for Member States to demonstrate in applications the cause of the redundancies, the mobilisation procedures are still considered lengthy by a majority of stakeholders.

Based on the Commission's experience in dealing with EGF applications and the feedback from implementing stakeholders in Member States the most promising avenue to increase efficiency is an early start of measures (even before the EU approval) and to further reduce the adoption deadlines. Member States could help more workers by early start of measures, and by further reducing Commission's time to analyse an application efficiency could be further improved.

The publication by the Commission in May 2017 of the EGF frequently asked questions (FAQs)<sup>88</sup> proved useful for Member States<sup>89</sup>. The FAQs contain answers that serve as assistance and guidance during all the stages of an EGF case. These have been constantly updated to include the changes of the 2021-2027 EGF Regulation.

#### 4.1.3. COHERENCE

##### a. Complementarity with other EU policies and initiatives

The coherence criterion looks at how well the EGF intervention works together with other EU policies and initiatives (particularly the ESF+) and with national instruments that have similar aims. This is done in particular by analysing complementarity at both instrument and case level, overlaps or duplication, and measures taken to avoid this or to ensure complementarity.

Most stakeholders (62%) from 26 Member States consulted via the written consultation conducted by the Commission in November 2024 agree that **EGF complements ESF+** in the area of employment policies by offering a reactive one-off support following specific restructuring events, in a more tailored, flexible and intensive manner than the national measures or ESF+. The ESF+ has been designed to offer a more long-term approach, which also makes it possible to anticipate structural change, in contrast to the short-term one-off support offered by the EGF. The EGF is mobilised on a needs basis, when Member States require financial support to help dismissed workers, thus adding value. However, there is

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<sup>87</sup> Commission EGF Database.

<sup>88</sup> <http://ec.europa.eu/social/BlobServlet?docId=22041&langId=en>

<sup>89</sup> For the avoidance of doubt, it should be stressed that a guidance document cannot replace a legally binding act, thus the two are not interchangeable.

scope to better align the EGF and the ESF+, as some Member States choose to fund EGF-type measures using the ESF because of the higher co-financing rate.

Nearly all respondents from targeted written consultation indicated that the EGF was strongly coherent with other support measures available at the EU level. However, in the written survey aimed at the 20 Member States that did not apply for EGF co-financing during 2021-2024, more than one third indicated that they did not apply because the national measures or ESF+ were more favourable, easier and faster to mobilise in their country or because of a certain degree of overlap between the EGF and national measures<sup>90</sup>, or with other EU instruments<sup>91</sup> (such as the ESF+, JTF, RRF), which can be made available more quickly and provide more flexibility.

An extensive study was published in 2018 on the coherence, complementarity and coordination of the European Structural and Investment Funds (ESIFs) and between various other instruments such as the EGF. According to this study, the EGF complements the ESF in its objective to improve employment opportunities, strengthen social inclusion and promote education, skills and life-long learning<sup>92</sup>.

Measures promoting international labour mobility had been offered to a limited extent in some cases, but they have not been taken up due to limited labour mobility.

#### **b. Complementarity with national measures and instruments**

In general, the EGF is flexible enough to adapt to the national contexts, although there are considerable differences between national support frameworks for the unemployed. Also, the EGF supports, complements and adds to measures or activities funded by national instruments. The EGF is well integrated into existing delivery models or models established for the EGF and operating within the mainstream frameworks<sup>93</sup>. All 16 national authorities that responded to the public consultation and the mid-term evaluation of the 2014-2020 EGF confirmed this conclusion.

In Member States with EGF cases during 2014-2020, no inconsistencies were observed. On the contrary, the EGF was widely considered as complementary to national support structures. In many cases, the EGF adds to what can normally be implemented in a Member State (e.g. through more intensive support because more funds are available, or by making it possible for beneficiaries to choose from a tailor-made array of training courses that is broader than those usually offered at national level).

The new requirement of the 2021-2027 EGF Regulation to include in all applications information on how the EGF is coordinated with the recommendations set out in the EU **Quality Framework for anticipation of change and restructuring (QFR)**<sup>94</sup>, the EU policy instrument setting a framework of best practice for anticipating and dealing with corporate restructuring, has **improved coherence of the Fund** (see lessons learned in Chapter 5.2). While Structural Funds and EGF interventions are consistent with the principles set out in the quality framework, this policy instrument was not referred to

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<sup>90</sup> EL, IE, LU, NL, RO, SI, FI.

<sup>91</sup> CZ, EE, HR, HU, IE, LV, LT, PL, RO and SK.

<sup>92</sup> [Study on the coordination and harmonisation of ESI Funds and other EU instruments - Regional Policy - European Commission \(europa.eu\)](#), p.88.

<sup>93</sup> Mid-term evaluation of the EGF 2014-2020, SWD(2018) 192/16.5.2018, p. 42.

<sup>94</sup> [COM\(2013\)882 final](#)

before the 2021-2027 period in guidance to Member States when designing or implementing EGF measures. The analysis of the EGF applications sent by Member States during 2021-2024, shows that, in general, the EGF is clearly coordinated with the recommendations set out in the EU QFR for anticipation of change and restructuring.

In some cases, the EGF intervention was part of a wider policy framework aimed at minimising the consequences of mass redundancies in a region. The EGF addressed the short-term employment consequences of the restructuring event and was implemented alongside a wider and longer-term economic growth plan for the area or region. This not only ensured coherence between the activities implemented by other regional and local stakeholders, but also amplified the sustainability of the EGF's results<sup>95</sup>.

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

### **EU added value**

Despite the limited evidence, the EGF seems to provide added value when compared to what Member States could have achieved alone through national measures targeted at helping workers made redundant.

The results of the written consultations highlight that some **70% of respondents felt that the EGF represents an added value**<sup>96</sup>. **62%** of respondents to the beneficiary survey evaluated the EGF favourably in comparison with other sources of support at national/regional level, citing in particular the EGF support being **more tailored to the specific needs of beneficiaries**.

The *volume effects*<sup>97</sup> are defined as effects that show how the EGF has added volume compared to the national measures in place. Based on the case research and on the consultations, the majority of those involved in the delivery of the EGF confirm it has added volume effects to the delivery of services. Four ways in which the EGF adds to volume have been identified:

- The EGF enabled Member States to help more people than would be the case if they had to rely only on national funds. This was further intensified by the broadened scope and lowered threshold.
- The EGF resources also enabled Member States to devote more time and financial resources to better assessing the beneficiaries' needs and thus to provide more tailored support.
- The additional EGF resources resulted in more intensive, targeted support than national measures did. The EGF increased not only the overall number of services, but also their variety.
- The EGF makes it possible in some cases to add to existing active labour market measures already available in the Member States by extending the duration of the specialised services or the volume of support. Some national measures target only those who have been unemployed for a long time (e.g. 6 months to a year).

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<sup>95</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.43.

<sup>96</sup> Written surveys with stakeholders from all Member States carried out during October-December 2024.

<sup>97</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.46.



*Scope effects* arise when more people are targeted or there is an expansion of the measures offered compared to what would have been the case without the EGF support. The EGF has considerable scope effects, although this also varied considerably across Member States depending on national support systems.

Firstly, in almost all Member States<sup>98</sup>, the EGF allowed Member States to experiment with innovative active labour market measures that might not be normally available to redundant workers. The flexibility of the EGF allowed for greater personalisation of solutions for workers by taking into account their specific needs and aspirations; this aspect of the EGF was considered to contribute substantially to the success of the national measures, thus raising their effectiveness<sup>99</sup>. At instrument level, the EGF provided more targeted and individualised support to beneficiaries compared to what could be achieved by the ESF+, which usually provides more horizontal and structural support.

Secondly, the EGF provides a scope effect, making it possible to provide support to different groups of beneficiaries. Usually, the national PES support targets those furthest from the labour market, e.g. the long-term unemployed or people with particularly low levels of skills and education. In contrast, the EGF allows support to be given all groups of people, from high-skilled workers to workers who are very difficult to place on the job market, need additional support or are lacking essential skills. Nevertheless, this scope effect is linked to the degree that the dismissing companies are involved in the design and implementation of the measures and in providing financial support to the redundant workers.

*Role effects*<sup>100</sup> relate to the extent to which innovative ideas tested and lessons learned from the implementation were incorporated into the regular package of provisions. These are more likely to become visible in the long term, so limited examples have been identified. In some countries **innovations from the EGF have been (or will be in the future) mainstreamed at national level**. In Belgium, for instance, over time several innovations<sup>101</sup> have been ‘tested’ in EGF cases, to be mainstreamed into regional or national measures if successful. In Spain, EGF cases have been used as a reference point in the design of other jobseeker-placement projects and local employment initiatives.

*Process effects*<sup>102</sup> relate to the general improvement of delivery processes thanks to experiences during EGF implementation. Overall, this is the least common EU added value effect of the EGF, although examples of process effects from previous and current programming periods exist in Finland, Belgium, Germany, Spain, Italy and Sweden<sup>103</sup>. The EGF fosters cooperation between public- and private-sector stakeholders in the design

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<sup>98</sup> In Belgium, Denmark, Germany, Greece, Italy and Spain. In Germany, during a one-day bus tour former workers from Vallourec were taken to visit and discuss with possible hiring companies. Also in Germany, the beneficiaries who complete digital trainings would get a tablet. In Belgium, Flanders, a job fair was organised, while in Wallonia incentives were given to beneficiaries to participate in digital trainings.

<sup>99</sup> EGF case studies.

<sup>100</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.47.

<sup>101</sup> Examples include the workshops reflecting on self-confidence and self-esteem, awareness and support for entrepreneurship. In Flanders, examples include organising of job fairs to help displaced workers find new jobs, while in Wallonia incentives were given to beneficiaries to participate in digital trainings.

<sup>102</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.47.

<sup>103</sup> Findings from previous evaluations of the EGF 2014-2020 confirm process effects in the cases from Finland and Sweden. The other Member States had cases during the 2021-2027 period.

and delivery of the measures in a way that other EU instruments do not. A process effect in terms of the procedures employed is less common. From the case research, the lessons from the EGF had only been applied to other EGF cases, but they may feed into policy discussions on future changes that would mainstream tested processes into regional or national provisions.

In terms of *cross-region and cross-border effects*, the evidence collected does not show any such effects. Very few respondents to the beneficiary survey indicated that the EGF helped them find a temporary job (8/33 respondents with new job in a different region or country) or permanent job (25/245 respondents) outside of their original country of residence. As the implementation of the Fund is left to individual Member States, there is limited cross-border coordination between Member States within the context of the EGF, which might be a limiting factor in producing cross-border effects<sup>104</sup>. Due to limited number of applications, further analysis on the cross-border effects was not possible.

### 4.3. Is the intervention still relevant?

#### Relevance

The evaluation of relevance looks at the relationship between the current and future needs and problems and the objectives of the intervention. The assessment in this evaluation covers three core aspects: a) the appropriateness and usefulness of the *broadened scope* of the EGF; b) its *modified intervention criteria* of the 2021-2027 EGF Regulation; and c) the extent to which it met Member States' current and future needs.

Under the changed scope and intervention criteria the impact is defined as the threshold of 200 workers who lost their jobs no matter the cause. The EGF can intervene, only at the request of a Member State, by providing specific, one-off support to facilitate the reintegration into decent and sustainable employment of displaced workers in areas, sectors, territories or labour markets suffering from a shock caused by serious economic disruption.

#### a. Relevance of the broadened scope of the EGF

The **scope** of the EGF relates to the causes that trigger redundancy events. Until the end of 2020, the EGF could only be mobilised if the redundancies had been caused by either trade-related globalisation or any global financial and economic crisis. The 2021-2027 Regulation **broadened the scope of eligibility** to support displaced workers due to any unexpected major restructuring event, not only those caused by challenges related to globalisation, but also the transition to a low-carbon economy, or as a consequence of digitisation or automation, etc.

During the 2021–2024 period, out of 18 EGF applications, there were: 5 (28%) relating to globalisation, 11 (61%) linked to a crisis (6 related to corporate crisis and 5 to COVID-19 crisis), one linked to a company takeover and one linked to declining demand for a specific product and overcapacity<sup>105</sup>.

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<sup>104</sup> EGF beneficiary surveys for seven EGF cases.

<sup>105</sup> In the case of EGF/2024/002 BE/Limburg machinery and paper, the displacements in the paper sector were due to the declining demand for graphics products resulting from increased digitalisation and the resulting growing overcapacity of the European woodfree coated paper industry.

The low number of applications during 2021-2024 can be explained by several reasons. One reason, underlined by past evaluations is that the number of EGF applications has always been cyclical and correlated with the general trend in employment and the economic realities in Member States. Other reasons presented by stakeholders from Member States who did not apply for EGF co-financing are: national economies doing well, the labour market is able to absorb the displacements, support to redundant workers was provided with national funds or other EU instruments (ESF+, JTF), as these are available more quickly and provide more flexibility.

Between 2021-2024, 18 EGF applications were submitted by Member States, of which only five EGF applications had been as a result of the COVID-19 crisis. **Every single stakeholder consulted**, at EU level and in the Member States **agreed that the broadened scope of the EGF better reflects the economic realities and makes the EGF fairer, more accessible, inclusive and more relevant**. In the set-up for 2014–2020, the EGF excluded redundancies generated by intra-EU trade and offshoring within the EU, and did not account for job losses driven by digitisation and automation that were not linked to globalisation or a global financial and economic crisis<sup>106</sup>.

**The extended the scope to any large-scale restructuring event and the simplified application procedure** made the EGF **fully open** to cover all displaced workers, **thus striving to leave no one behind**. Decisions for EGF co-financing are based on the expected impact of the displacements (defined by the threshold of 200), rather than their cause. This results in **more flexibility** for Member States to target the needs of displaced workers. Based on the evidence collected, this made the **scope of the EGF appropriate** to the ever changing labour market needs.

#### **b. Relevance of the modified intervention criteria of the EGF**

The intervention criteria relate to the number of redundancies that occurred in a single enterprise or an economic sector. In case of redundancies in a particular economic sector, the emphasis is on allowing applications combining redundancies in SMEs operating in the same sector. Among the 18 applications covered by this evaluation, 12 concerned redundancies in a single enterprise, 4 were sectoral applications, 1 used the new clause of combining displacements in several economic sectors in the same region, and 1 used the derogation clause for small labour markets.

Since the launch of the EGF in 2007, the threshold had been lowered from 1 000 redundancies in the 2007–2013 period to 500<sup>107</sup> in 2014–2020, and further to 200 for the 2021-2027 period. The **majority of stakeholders (80%)** from all 26 Member States consulted via written consultations consider that **the lowered threshold is an encouraging factor for Member States to apply** and no longer a barrier as it was considered during the 2014-2020 period. Usually not all dismissed workers need support, thus the total number of targeted workers is usually lower than the number of displacements. Regarding the threshold of dismissed workers, in 5 applications (out of 18 received during 2021-2024), i.e. 27%, the total number of dismissed workers was below 500 dismissals, while in the rest (13 cases) it exceeded 500. This implies that the lowered threshold of 200 did not necessarily trigger more applications. In terms of number of workers targeted for the

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<sup>106</sup> Lucian Cernat & Federica Mustilli (2018): *Trade and Labour Market Adjustments: What Role for the European Globalisation Adjustment Fund?* p. 80.

<sup>107</sup> The 500 dismissals threshold was first introduced for a limited period during 2009–2011 by Regulation (EU) 546/2009 amending Regulation (EC) No 1927/2006.

EGF measures, in 11 applications the number was lower than 500 targeted workers, while in 7 it exceeded 500.

In past evaluations, several Member States and stakeholders indicated that the EGF's relevance would be improved by adapting the dismissal period to avoid the exclusion of workers falling outside the standard reference periods. This feedback was taken into account and the 2021-2027 EGF Regulation adapted the eligibility period for beneficiaries. Outside of the reference period of four or six months, more displaced workers and self-employed persons whose activity has ceased, can be included as eligible beneficiaries, provided the displacement happens six months before the start of the reference period or between the end of the reference period and the last day before the date of the completion of the assessment by the Commission.

The change of the intervention criteria to include the possibility to support workers displaced from several economic sectors in a region, addressed the feedback received in the previous evaluation from national authorities, who argued that this was a hindering factor for applying for EGF. Thus the EGF warrants a more flexible approach to restructuring events involving more than one company. This option was used in one case covering workers from two economic sectors (machinery and equipment, and paper).

### **c. Extent to which support corresponds to needs and profiles of beneficiaries**

Findings of this evaluation re-confirm what was uncovered by previous EGF evaluations, that there is widespread agreement across all stakeholder groups that the **EGF is adequately tailored to the specific needs of the relevant target groups**. EGF assistance also removed barriers to participation in measures by offering various types of allowance such as job search, training, and returning to study allowances (see above *Use of EGF by Member States*). According to the seven EGF beneficiary surveys, 62 % of the respondents agreed that the EGF was **tailored to their needs**, while 26% disagreed, and others (12%) were unable to provide a response.

Analysis of the final reports and applications received show that same different practices uncovered by past EGF evaluations are used to match the beneficiaries' needs and profiles with the support offered. In some cases (Belgium), the needs of beneficiaries are identified by sending a targeted survey to each worker prior to designing the EGF measures. In other cases (e.g. Denmark, France, Italy, Spain, Germany) a profiling and needs assessment is carried out via individual interviews at the start of the EGF implementation.

Interviews at EU level also pointed to an improvement with each programming period in the design of the package of measures at Member State level, stating that **EGF measures increasingly took into account the socio-economic context**, therefore addressing workers' needs in a holistic way, for example by providing additional support for childcare and benefits during the retraining process (in Spain).

There is substantial variance in the rates of beneficiaries helped and absorption rates across cases, even when taking into account the profiles and needs of beneficiaries, including also in most cases the needs of the labour market and local companies.

As in previous programming periods, the EGF Regulation<sup>108</sup> allows for a certain degree of **flexibility to reallocate funds between measures based on needs that may emerge**

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<sup>108</sup> See Article 17(5) of Regulation (EU) No 2021/691.

**during the implementation period**, provided that the total EGF budget is not exceeded. Budgetary flexibility is important and Member States it was used it for minor reallocations (of less than 20% of the planned budget) during the implementation of cases. For reallocations above 20% of the planned budget, Member States must inform the Commission. Such reallocations have been requested during 2021-2024 period in about 22% of cases<sup>109</sup>, while during the 2014-2020 these occurred in about 10% of cases.

In terms of future needs of the labour market, the megatrends<sup>110</sup> to look at are, among other, the changes to where and how we live and the demographic challenge. People are increasingly living in cities and are more exposed to the negative impacts of climate change. Technologies are changing the way we work and learn, bringing both opportunities and risks. On the one hand, there are new ways of working and delivering services; on the other, there are job losses and a pressing need for new skills. Both climate change and the twin digital and green transition will have dramatic and diverse impacts across EU regions and economic sectors. This trend coupled with the EU's shrinking population and aging population will put pressure on the labour market as well as on fiscal sustainability.

Against the backdrop of such global trends, there is an increasing need for a faster re-skilling and/or up-skilling of workers, which could start even before they lose their jobs.

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

### **5.1. CONCLUSIONS**

The Commission carried out a mid-term evaluation of the EGF to assess how and to what extent it is reaching its objectives. The effectiveness, efficiency, coherence, relevance and EU added value of the results achieved were assessed. The focus of the evaluation is on the changes introduced for the 2021-2027 period, in order to analyse to what extent these changes led to the expected outcomes. Limited lessons for the Fund's implementation and design are also included.

The conclusions need to be seen in the light of the considerable limitations. The early timing of the EGF mid-term evaluation allowed for only limited availability of information, evidence and experience to be taken from the current period. The improvement in the economy had led, among other reasons, to a downturn in the number of EGF applications, reducing further data availability. Other challenges were lack of performance indicators, limited suitable comparators with data from the first programming period, and limited available resources for the evaluation.

The overarching conclusions set out below are underpinned by evidence collected from the 18 applications, 7 final reports, 7 beneficiary survey for each completed case, previous

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<sup>109</sup> For EGF/2021/002 IT Air Italy and EGF/2021/003 IT/Porto Canale, Italy has requested several budget reallocations. For Air Italy, two measures regarding were increased for providing more reimbursement of mobility costs and contributions to accommodation and travelling cost when in training. Also, the technical assistance lines were adjusted to use the amount not spent for preparatory measures to supplement the management and control activities. For Porto Canale, the budget reallocation was requested to offer more training support. For EGF/2021/006 ES Cataluña automotive, an additional measure was added: a participation incentive offered to the workers encourage workers' participation. The funds for this measure come from the reemployment incentive. For EGF/2022/003 ES Alu Ibérica, the reallocation was requested to offer more job search assistance and training courses.

<sup>110</sup> [ESPAS-Global-Trends-to-2040-Choosing-Europes-Future-EN.pdf](#)

EGF evaluations, and from other relevant Commission reports and studies. Results of the beneficiary surveys are considered representative for each case<sup>111</sup>. Despite the Commission's efforts to evaluate as broadly as possible and consult as widely as possible, the results of the evaluation have to be taken cautiously read due to the lack of available data.

On the *effectiveness* of the EGF, based on the limited available data, the EGF **has met its objective** of solidarity towards displaced workers and the self-employed whose activity ceased due to restructuring events, while supporting them to find sustainable jobs or start their own business. However, there are significant differences between cases and Member States. Beyond reintegration into the labour market, the EGF has, to some extent, produced **long-lasting effects on beneficiaries' general employability**. For example, new skills and qualifications, including digital skills and environmental/green skills, increased self-esteem, feeling better qualified for work, feeling encouraged to overcome gender stereotypes in job selection and new social networks from participating in EGF measures. These less tangible results are reflected in the beneficiary survey of each EGF case, which offers a more qualitative approach to evaluating effectiveness. To a limited extent, beneficiaries' participation in a personalised orientation process made them more proactive, encouraged them to develop their personal and social skills and had a positive effect on their families. Overall, the average **re-integration rate** of displaced workers into the job market was around **50%** for the seven completed cases, a drop compared to the previous programming period (60%). This rate depends on the specific aspects of the case as well as external factors and personal reasons. **In the longer term, the re-integration rates improve** in most cases.

Under the extended scope of eligibility and lowered threshold to 200 displacements, the **EGF is effective in offering support to all eligible beneficiaries**, no matter the cause of the redundancy. The **broadened scope and modified intervention criteria** (threshold of 200 displacements during 4 months in a company or a regional case, or during 6 months a sectoral case) are more appropriate and allow for a broader, more equitable distribution of resources, making it **more accessible to a wider range of beneficiaries**. Based on the information available, the **EGF is flexible enough to provide tailored support to different groups**; in some cases, specific support was included for vulnerable groups.

There are several reasons influencing beneficiaries' uptake of EGF measures. These are: (i) external factors such as the job market situation; (ii) an early and intensive general information package; (iii) an early start to personalised measures; and (iv) continuous adjustment of measures in response to current developments.

**The EGF provides all eligible beneficiaries included in the application of a Member State with more tailored and intensive support than those offered by national measures and other EU instruments**<sup>112</sup>. The EGF measures ensure that all beneficiaries are treated equally. It helps to remove barriers to participation and enables tailored support to be provided to vulnerable and/or disadvantaged groups. For example, by making

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<sup>111</sup> 645 replies were received for the 7 beneficiary surveys carried out for the seven completed cases. Of these 645 replies, only 80% of respondents were aware of that the measures were co-financed by the EGF and or EU. The replies can be considered as representative of the experience of beneficiaries of those completed EGF cases.

<sup>112</sup> *Study supporting the ex post evaluation of the European Globalisation Adjustment Fund (2014-2020)*, p. 13, <https://op.europa.eu/en/publication-detail/-/publication/ceb95383-a24f-11eb-b85c-01aa75ed71a1>.

available allowances for childcare or elderly care. The EGF's **flexibility** in terms of the types of measures is highly appreciated. However, some Member States would like to use a higher percentage than 35% for the allowances<sup>113</sup>, such as job search allowances, training allowances, subsistence allowances and mobility allowances.

At application stage, it is difficult for Member States to identify the needs and wishes of potential beneficiaries. Reallocations of funds was possible for the 2014–2020 period. Reallocations continue to be possible for the 2021–2027 period. This is often communicated via the FAQs and EGF contact persons meetings.

By **simplifying the application procedure** (removing the need to demonstrate the link to the cause of displacements) and **shortening the deadlines** for the procedures for both the Commission and the Member States, the **EGF has become more accessible**.

The **implementation period averaged 29 months** in 7 cases, ranging from 6 months to 40 months<sup>114</sup>.

The new provision to take into account the **dissemination of skills** required in the **digital age** and in a **resource-efficient economy** as a cross-cutting element of any package of personalised services offered, has been consistently added by Member States to the offer of measures. Results of the beneficiary surveys show that 32% of beneficiaries gained digital skills and 25% gained environmental/green skills thanks to the support of the EGF.

As pointed out in previous evaluations, a positive effect of the use of EGF is that it fosters the development of a general delivery mechanism to restructure assistance in Member States with little experience in dealing with mass redundancies. In Member States that can already build on a wealth of experience and delivery mechanisms, the EGF serves as a tool to test innovative measures, which could later be mainstreamed in employment and social policies. In half of the cases, Member States expressed a positive opinion on the guidance received from the Commission during the application phase.

Aligning the **EGF co-financing rate** with the highest ESF+ rate (while maintaining a minimum of 60%) has been seen as a factor encouraging EGF applications when the EGF rate was higher than the ESF+<sup>115</sup>.

**Better data collection and monitoring requirements** were observed following the specific common indicators and the beneficiary survey for each EGF case introduced under the 2021–2027 EGF Regulation. This enabled an evaluation of the EGF's results not only using the re-integration rates, but also using the beneficiary survey. Less tangible results could also be analysed which increase the beneficiary's overall employability. However,

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<sup>113</sup> As during the 2014–2020 period, the co-financing of allowances continues to be capped at 35% of the total package of personalised measures, in order to provide proportional assistance, and in line with the findings of an audit of the 2007–2013 EGF ([ECA \(2013\), p. 28](#)). Such allowances can only be co-financed if they are conditional on the active participation in EGF measures.

<sup>114</sup> Six months implementation period for EGF/2021/006 ES/Cataluña automotive, and 40 months for EGF/2021/005 FR/Airbus.

<sup>115</sup> For the ESF+, the co-financing rate can vary between 50% and 85%, depending on the area of investment and the development level of the region in which the activities are taking place. For the EGF, the co-financing rate is aligned with the highest ESF+ co-financing rate in the respective Member State, while maintaining the minimum of 60%.

because there is still no requirement of having a baseline, targets or milestones for these indicators cannot be considered as performance indicators.

Other factors influencing the effectiveness of EGF cases are: (i) the **level of involvement of social partners and companies laying off workers** in the measures' design and implementation; (ii) the degree to which sufficient information on the possibilities of the EGF is available to workers; and (iii) how far national procedures allow for smooth implementation. EGF cases sometimes start with a delay or planned measures cannot be implemented due to administrative issues.

Feedback collected from the beneficiaries surveys shows that **overall awareness** of the EGF **has improved** compared to previous periods. However, there is still room for improvement. The Commission's effort in promoting the EGF was considered an asset for the beneficiaries in several cases. In some Member States (notably BE, CY, DE, EE, ES, IT, FI, HR, HU, IE, LT, LV, PT, SE), there is more awareness about the EGF because social partners have participated in delivering some of the measures. In other Member States not all relevant stakeholders, including beneficiaries, are aware of the EGF and its potential benefits. About 80% of respondents to the beneficiary survey were aware that the measures they received were co-financed by the EGF/the EU, while 20% were not aware of it. There is thus scope to improve communication and raise awareness about the EGF among workers and their representative organisations at both EU and Member State level.

Analysis of the **efficiency** of the assistance mobilised shows that the **length of procedures** during the decision-making process has been **criticised** despite the substantial shortening of the timing and the stricter deadlines for Commission and Member States.

**The changes introduced by the 2021-2027 Regulation, shortened the procedures** to adopt an application both for the Commission and the Member States **has improved the EGF's efficiency**. However, the length of the procedures at EU level continues to be cited as one of the main reasons for not applying for EGF support and points of criticism according to Member States who did not apply. **The total time needed to complete the EU level procedures for the 2021-2024 period was on average 5.5 months<sup>116</sup>** a decrease, compared to 7.2 months for 2014-2020. The decision-making process at EU level causes delays to project implementation. However, **procedures at national/regional level are a more significant obstacle to efficiency**.

**Simplifying the application process** by eliminating the need for Member States to demonstrate the cause of the redundancies was also introduced by the 2021-2027 EGF Regulation. This change was appreciated by all Member States who applied and has brought **significant increase in efficiency**.

According to the stakeholder consultations, **the amounts available for the measures are sufficient**. Most respondents to the Commission's written consultation believed that the same results could not have been achieved with fewer resources or in a shorter time period.

The **absorption rate** (the percentage of the spending of the assistance granted) is looked into when analysing the resources used, however it does not reflect the cost-efficiency at case level, it has no case-specific target and cannot be considered a performance indicator. When compared to the previous period, the absorption rate of EGF co-financing, seems to

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<sup>116</sup> From the date of application until the date of payment.



have **improved**, from an average of 59% (average for 46 EGF cases)<sup>117</sup> to **63%** (average for 7 EGF cases). In general, EGF cases tend to make partial use of resources allocated. Although some trends have been found across Member States, discrepancies are largely case-specific. The main reasons for a lower absorption rate are a better-than-expected labour market situation and eligible beneficiaries finding new jobs by themselves when there are delays in the start of EGF measures. Other reasons for lower absorption rates are Member States tending to overestimate budgets to reduce the risk of overspending, problems related to national procedures and the many unknowns at the time of application (e.g. the needs and interests of workers, level of participation in EGF measures). Thus, the absorption rate of an EGF case is not an indicator of the success of the case.

The EGF is **coherent** with national, regional and/or local policies and offers sufficient flexibility to complement and/or add to the labour market measures provided by Member States at national level. In some cases, EGF intervention was part of a wider policy framework aimed at minimising the consequences of mass redundancies in a region, thus ensuring coherence between the activities implemented by other regional and local stakeholders, and also amplifying the sustainability of the EGF's results<sup>118</sup>.

Strong complementarities were found between the EGF and the ESF+, as they have different scopes and objectives, and complementarity is ensured through coordination between the Funds at national level. However, there is scope to better align the EGF and the ESF+, as some Member States choose to fund EGF-type measures using the ESF+, JTF, RRF because these are already available and provide more flexibility to reallocate amounts quickly. At case level, no overlaps with other EU or national funding could be identified, although a few Member States expressed that there are some overlaps with national measures or the ESF+.

Another change for the application requirements was that the Member States' use of the EGF is better coordinated with the recommendations set out in the EU Quality Framework for anticipation of change and restructuring (QFR), which are now included in the explanations of each EGF application.

The EGF has been successful and generated considerable **EU added value** in 2021-2024. This is particularly true in terms of its volume, scope, role and process effects, though they differ by Member State and are largely dependent on national support structures. The EU added value is significant for volume effects, meaning that EGF assistance not only increases the number and variety of services offered, but also their level of intensity, striving to leave no one behind.

**EGF measures** are always **offered on top** of national measures in order to strengthen them. The help offered would otherwise not have been available. This is a clear sign of the complementarity of EGF measures.

As the EGF is largely complementary to other EU instruments (notably the ESF+), it adds value compared to their scopes and target groups. It achieves this by offering an additional source of financial support on a case-by-case basis and more targeted, tailored, and individualised support to the very specific and narrow target groups it seeks to assist.

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<sup>117</sup>Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p. 37.

<sup>118</sup> Ex post evaluation of the EGF 2014-2020, SWD(2021)381/13.12.2021, p.43.

On **relevance**, regarding the question to what extent the EGF addresses beneficiaries' needs, the findings of this evaluation re-confirm previous findings. Those findings highlighted, that there is widespread agreement across all stakeholder groups that the **EGF is sufficiently adequately tailored to the specific needs of the relevant target groups**.

The *modified intervention criteria* with a lowered threshold of 200 displacements were found to be relevant and useful. Several Member States indicated that smaller labour markets would benefit from lowering the minimum threshold for redundancies.

In conclusion, the evaluation shows a **high degree of relevance** of EGF funding during the 2021-2024 period. Evidence also shows that the *extended scope and modified intervention criteria* are relevant, better reflect the economic realities of the applicant Member States, the current needs of the beneficiaries and make the EGF more accessible.

In terms of *future needs*, by looking at megatrends data<sup>119</sup> related to the way people work and learn, the challenges of the twin digital and green transitions, the impact of AI, coupled with the shrinking and ageing EU population, and the geopolitical environment, coupled with the EU's shrinking population and aging population will put pressure on the labour market, as well as on fiscal sustainability.. On the one hand, there are new ways of working and delivering services; on the other, there are job losses and a pressing need for new skills.

Against the backdrop of such global trends, there is an increasing need for a faster re-skilling and/or up-skilling of workers, which could start even before people lose their jobs.

## 5.2. Lessons learned

The 2021–2027 EGF Regulation addressed many issues (e.g. the extended scope, simpler and faster application procedures, more data collection including a beneficiary survey, the co-financing rate, more communication requirements), based on lessons learned from the implementation of the EGF during the previous programming period

There are several key lessons learned from the implementation during 2021-2024 both at Member State and at EU level, which could further improve the implementation of the EGF.

At Member State level, there are several key lessons learned.

- *Faster application process* becomes possible for Member States with previous experience in EGF cases. However, the lengthy procedure remains a barrier for some Member States.
- The use of EGF assistance encourages the development of a general delivery mechanism of restructuring assistance in Member States with little experience in dealing with mass redundancies.
- *Early start* of national procedures to ensure early intervention. This includes example, procurement of training courses as quickly as possible.
- *Design* of the labour market measures. Many Member States acknowledged the importance of tailored support based on beneficiaries' needs.

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<sup>119</sup> [ESPAS-Global-Trends-to-2040-Choosing-Europes-Future-EN.pdf](#)

- The importance of *physical proximity and easily accessible support* to beneficiaries. In many cases, the EGF support has positively influenced the way active labour market measures are managed at national level and the partnerships that feed into them.
- The *need to improve communication activities*. This can be achieved by explaining what measures and activities can be supported by the EGF and how, through communication adapted to different stakeholders (beneficiaries, companies and training providers) in addition to national EGF operators. Member States should actively communicate and raise awareness about the EGF, especially among beneficiaries, as this is not done systematically or with the same degree in all EU countries.

At EU level, there are also several key lessons learned.

- The EGF benefits from an *extended scope* adapted to all major challenges facing the European labour market (like automation, digitisation, transition to a low-carbon economy).
- As an emergency response instrument, the mobilisation of the EGF benefits from a simpler and shorter *application process*, with less evidence required. The simplified process included in the 2021–2027 EGF Regulation improves the EGF's effectiveness and accessibility. However, the length of the procedure is still considered too long and complex. Making the decision process even faster would further improve the EGF's accessibility and uptake.
- The success of EGF measures is better measured through a combination of re-integration rates and *more qualitative data* like new skills and qualifications, social networks and self-confidence gained as a result of participation in EGF measures and also from the direct feedback of beneficiaries received via the beneficiary survey.
- The *effectiveness of the EGF should be evaluated more systematically* at case level by Member States, especially regarding the category of workers benefiting from the measures (professional and educational background), their employment status and the type of employment found. Reporting and monitoring requirements have improved, however there are still no performance indicators for the EGF. If Member States were to develop case-specific targets, the measuring and monitoring of the EGF's effectiveness would improve. However, some Member States are of the opinion that the monitoring and reporting requirements are already too burdensome.
- Some *budgetary flexibility* is needed for Member States to reallocate the funds based on needs that emerge during implementation. Those changes, which must of course be duly justified, are allowed under the EGF Regulation. However, some Member States seem to be unaware of this, pointing to a need to further enhance awareness.
- It is important to *maintain the flexibility of the EGF* and the degree to which the *EGF measures can be tailored* to individual beneficiaries' needs, backgrounds and interests. The flexibility to complement and/or add to the measures provided by Member States at national, regional and/or local level will ensure that the EGF continues to provide EU added value.

- The *need to improve communication activities*. At EU level, the Commission has not organised any networking seminars since the COVID-19 pandemic. Findings from past evaluations found that the seminars could be improved with a more bottom-up approach, allowing for more knowledge sharing. On external communications, more emphasis should be put on increasing the visibility of good practices, not only among Member States, but also for the broader public.

As underlined in the mid-term and ex post evaluations of the 2014–2020 EGF, another lesson learned that has been reconfirmed by this evaluation concerns **organisational learning** and the timing of the evaluation. Case implementation should be finalised, as this ensures that ample evidence can be collected, analysed and that the final results achieved are evaluated. The 2021–2027 EGF Regulation addressed the issue of the evaluation’s timing to some extent, with the aim to allow sufficient time to implementation and finalise EGF cases. However, findings suggest more time is needed, as only a limited number of cases have been finalised and included in this evaluation.

## ANNEX I: PROCEDURAL INFORMATION

### 1. LEAD DG, DeCIDE PLANNING

This evaluation was carried out by the Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL) and included in the Commission's *Agenda Planning* System (PLAN/2024/4353). DG EMPL drafted the evaluation call for evidence, the stakeholder consultation strategy and the evaluation questions, and presented them to the Interservice Steering Group (ISSG) for feedback discussions and approval. DG EMPL also carried out all the stakeholder consultation activities and ensured the publication of all relevant evaluation documents. In the final phase of the evaluation, it is the responsibility of DG EMPL to:

- draft this staff working document;
- draft the report disseminating the evaluation findings to stakeholders.

### 2. ORGANISATION AND TIMING

An ISSG was created in May 2024. The invitation launched on 20 March 2024 was addressed to the following DGs: BUDG, COMP, GROW, TRADE, REGIO, ECFIN, the Secretariat-General and the Legal Service.

The timing of the evaluation was as follows:

03 June 2024 – September 2024	Kick-off meeting and two rounds of consultation of ISSG via written procedure
02 August 2024 – 06 September 2024	Publication of the call for evidence and feedback period
September - October 2024	Seven EGF beneficiary surveys received for seven EGF cases from 2021.
10 October 2024	Online Networking Seminar with EGF stakeholders from implementing bodies, public and private authorities involved in 2021-2024 EGF cases
28 November 2024	Consultation of EGF contact persons on the EGF at instrument level. Interviews with Member States.
April 2025	ISG written consultation on the draft staff working document and report

### 3. EXCEPTIONS TO THE BETTER REGULATION GUIDELINES

N/A

### 4. CONSULTATION OF THE REGULATORY SCRUTINY BOARD (IF APPLICABLE)

N/A

### 5. EVIDENCE, SOURCES AND QUALITY

The main instruments used by the European Commission, DG EMPL, were:

- Member States applications and final reports submitted;

- Internal research and analysis done by the Commission service, general experience in the management of the EGF, including the Commission internal EGF Database with all the EGF cases from 2007 to 2024;
- EGF beneficiary surveys, which were carried out via the EU survey for each finalised EGF case. The results of seven EGF beneficiary surveys were analysed internally by DG EMPL.
- Stakeholder consultation activities (see Annex III), including an online public feedback period on the call for evidence via the ‘Europa Have your Say’<sup>120</sup> website, targeted interviews and consultations of national and EU stakeholders involved in designing, managing and delivering EGF;
- Background research and other methods and tools such as desk research, targeted consultations, case studies, (see Annex II for more details).
- Report from the Commission on the ex post evaluation of the European Globalisation Adjustment Fund (EGF) 2014-2020, COM(2021)788 and accompanying Staff Working Document, SWD(2021) 381;
- Impact assessment accompanying the Proposal for a Regulation of the European Parliament and the Council on the European Globalisation Adjustment Fund (EGF), SWD(2018)289, 5.06.2018;
- Literature review was done during a pilot project with the staff of the Publication office.
- Additional evidence from previous Commission reports and evaluations.

The Interservice Steering Group assessed the quality of this staff working document to be of good quality.

The conclusions and findings of the evaluation are considered as robust, within the limitations and the mitigating measures described in Annex II to this staff working document.

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<sup>120</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation_en)

**Methodology and sources of information**

The evaluation process started in 2024, following the Commission's Better Regulation Guidelines. As part of the evaluation, the lead DG consulted an Inter-Service Steering Group (ISSG) for advice reasons during the development of the task and also during the drafting process. The ISSG included representatives from the Commission services: BUDG, SG, SJ, COMP, TRADE, REGIO, ECFIN and GROW, thus diverging backgrounds, experiences and insights could be gathered, which allowed to provide the input necessary in order to assess the impact in areas beyond the scope of the lead DG.

This evaluation was done internally by Commission services and because of the low uptake during the analysed period 2021-2024, the focus was on the changes of the EGF Regulation 2021-2027.

The intervention logic presented in Annex VII was the starting point for the evaluation of the EGF in terms of its effectiveness, efficiency, relevance, coherence and EU added value.

The evaluation was based on the overarching evaluation questions for each criterion; each overarching question was further detailed in sub-questions, as presented in Annex III below. The evaluation work was structured around the conclusions reached on each of the questions.

The Commission based this evaluation mainly on the results of the internal and external research carried out by the Commission, the feedback from all the consultation activities carried out (Annex V) and complemented it, where appropriate, with additional evidence from previous reports, evaluations and general experience in the management of the EGF.

The following sources of information were used for this evaluation:

- Stakeholder consultation activities (see Annex V), including an online public feedback period on the call for evidence via the 'Europa Have your Say'<sup>121</sup> website, targeted interviews and consultations of national and EU stakeholders involved in designing, managing and delivering EGF;
- Member States applications and final reports submitted;
- Internal research and analysis done by the Commission service, general experience in the management of the EGF, including the Commission internal EGF Database with all the EGF cases from 2007 to 2024;
- External research for literature review was done during a pilot project between the staff of the Publication office and the unit coordinating the EGF in the Commission;
- Report from the Commission on the ex post evaluation of the European Globalisation Adjustment Fund (EGF) 2014-2020, COM(2021)788 and accompanying Staff Working Document, SWD(2021) 381;
- Impact assessment accompanying the Proposal for a Regulation of the European Parliament and the Council on the European Globalisation Adjustment Fund (EGF), SWD(2018)289, 5.06.2018;
- Additional evidence from previous Commission reports and evaluations.

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<sup>121</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation_en)

The consultation activities had the following three main objectives:

- To gather experiences and views from EGF beneficiaries for each completed EGF case,
- To provide the public and private stakeholders an opportunity to express their views and positions regarding the changes of the 2021-2027 EGF Regulation,
- To gather specialised input (data and factual information, expert views) from key stakeholders (implementing bodies and managing authorities at Member State level and also stakeholders at EU level) on their views and positions regarding the effectiveness, efficiency, coherence, relevance and EU added value of the EGF.

The final synopsis report on the stakeholder consultation has been carried out by the Commission, see also Annex V.

## **Methods and tools used for the evaluation**

### **Desk research**

In order to provide the evaluation with factual information, desk research was performed, mainly aiming at identifying relevant **secondary literature**.

The external literature review was done by the staff of the Commission Publication Office during a pilot project with the Commission service coordinating the EGF, in order to complement the evaluation research. The research criteria for this pilot project were provided by the Commission service coordinating the EGF and they were focused on four strands: a) searches with the name of the Fund; b) academic research search using a combination of several keywords related to restructuring, dismissals, mass redundancy, displacements; c) internet searches to explore topics that could have an impact on collective dismissals, namely corporate restructuring (including insolvencies, mergers and acquisitions), corporate/industry distress, collective redundancies from the employment law perspective, reports around the future of work and skill's gaps, etc; d) think tank institutions, international and governmental sources, data and statistics, and news outlets.

Further research was carried out by the Commission unit coordinating the EGF in order to complement the evaluation with statistics on the EU employment situation available on Eurostat and on the restructuring events which occurred in the EU during 2021-2024, provided by EUROFOUND's European Restructuring Monitor Database.

All available findings and insights were compared, synthesised, and included in section 2.2 of this evaluation.

### **Field research**

Call for Evidence (CfE) was conducted between 2 August 2024 and 6 September 2024. No Public Consultation was carried out, because the most important EGF stakeholders have provided their feedback directly in the beneficiary survey carried out via the EU Survey webpage for each of the seven completed EGF cases. The results of the seven beneficiary surveys have been received in September and October 2024.

More information on the stakeholder consultation activities is presented in Annex V.

The goal of the field research, which included targeted stakeholder meetings, interviews and surveys, was to supplement the body of information gathered through desk research and beneficiary surveys. Based on what was necessary from the Evaluation Matrix, the



data received from the desk review and the beneficiary surveys allowed for the identification of gaps in the themes that needed to be studied and the data that needed to be collected.

The data collected was used to respond to the evaluation questions. Each of the evaluation criteria was addressed to tailored evaluation questions, as laid down in the evaluation matrix.

For the sake of completeness, it should be mentioned that from all the consultation activities carried, feedback was received from all Member States and from the beneficiaries of the seven completed EGF cases from France, Italy and Spain. Although the total number of responses is considered to constitute a representative sample of EU stakeholders, the results of the consultations may not be interpreted to necessarily represent views of all EU stakeholders.

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

Even though the evaluation process as a whole was designed to ensure the evidence's robustness, limitations to the findings and thus also the robustness of the results must be taken into account. The main limitations and challenges have decreased compared with the 2014-2020 period, however some still persist:

- Timing of the *mid-term* evaluation. The figures are based on the situation at the end of December 2024, when only seven EGF cases had finished implementation. The results of the applications submitted in 2022-2024 could not be evaluated and included because their results will only be available between 2025 and 2027.
- The relatively small number of EGF applications received during the period covered by the evaluation (18 cases from 13 economic sectors) made it impossible to conduct sectoral analyses. To overcome this, based on the internal Commission EGF Database, overview tables on case profile data sorted by country and by sector were created; these can be found in Annex VI.
- Improved reporting requirements, but performance still not measured. According to the EGF Regulation<sup>122</sup>, in their final report, Member States have to state the type of action and main outcomes, the characteristics<sup>123</sup> of the beneficiaries and their employment status. Data on beneficiaries are broken down by gender, by age groups and educational level. Although the changes in the 2021-2027 EGF Regulation included the addition of common indicators to measure outputs and results and a beneficiary survey for each EGF case, it did not include targets set at the time of the application. Therefore performance cannot be assessed against planned outcomes. Overall, the available data is still limited and do not allow for further statistical analyses of the categories of beneficiaries, or a further breakdown of beneficiaries based on type of dismissing enterprise<sup>124</sup>. This issue was already identified by the European Court of Auditors during the audit of the 2007–2013

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<sup>122</sup> See Article 20 of the EGF Regulation.

<sup>123</sup> Besides gender, age groups and educational levels (ISCED 0-8), Member States also include in an EGF case's final report information about the percentage of EGF beneficiaries in employment and self-employment six months after the end of the implementation period, the percentage of EGF beneficiaries who gained a qualification by six months after the end of the implementation period and percentage of EGF beneficiaries in education or training six months after the end of the implementation period.

<sup>124</sup> For example the principal enterprise, or suppliers or downstream producers; or especially in the case of sectoral applications, also SMEs or the self-employed.

EGF<sup>125</sup>, in the course of the mid-term and *ex post* evaluations of the 2007–2013 EGF<sup>126</sup> and in the mid-term and *ex post* evaluations of the 2014–2020 EGF<sup>127</sup>.

- The significant differences across cases, Member States and economic sectors made it difficult to formulate reliable conclusions on the EGF's cost-efficiency and cost-effectiveness.
- Limited suitable comparators for data from 2007–2013 remained an issue. A comparison with data from the 2007–2013 period is of limited use<sup>128</sup> because of several changes in the EGF's design<sup>129</sup> (see Annex VIII below) and the evolving economic context.

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<sup>125</sup> [European Court of Auditors \(ECA\) \(2013\), Special Report No 7: Has the European Globalisation Adjustment Fund delivered EU added value in reintegrating redundant workers?, p. 28.](#)

<sup>126</sup> Ex post evaluation of the EGF 2014-2020, Staff Working Document, SWD(2021) 381, p.65, [Mid-term evaluation of the EGF 2007-2013 \(2011\), p. 52](#) and EGF ex-post evaluation 2007-2013, [p. 121](#).

<sup>127</sup> [The mid-term evaluation of the EGF 2014-2020](#), (2018) – Final Report, ICF, p. 16

<sup>128</sup> Please see the [Ex-post evaluation of the EGF 2007-2013](#), (2015) and the mid-term evaluation of the EGF 2014-2020, (2018).

<sup>129</sup> The *ex post* evaluation of the 2007–2013 EGF had also considered the identification of comparators as a major challenge (See p. 90).

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

Sub-questions	Operational questions	Indicators	Judgement criteria	Data sources
<p>Effectiveness (EQ1): The aim of the EGF is to demonstrate solidarity towards workers made redundant and to ensure for each EGF case that the largest possible number of beneficiaries find sustainable employment as soon as possible.</p> <ul style="list-style-type: none"> <li>As an instrument, how effective was the EGF in achieving these aims?</li> <li>At the level of cases, how effective was the EGF in achieving these aims?</li> </ul>				
EQ 1.1: To what extent is the support provided by the EGF used?	<p>Is the objective of the EGF clear?</p> <p>Are relevant stakeholders aware of the EGF in given MS?</p> <p>To what degree was there sufficient information on the EGF available to Member States?</p> <p>What are the factors that encouraged Member States to apply for EGF?</p> <p>What are the factors that hindered Member States from applying for EGF?</p>	<p>Number of applications received by MS/year</p> <p>Number of applications refused by MS/year</p> <p>Number of applications approved by MS/year (leveraged EU spending to support dismissed workers)</p> <p>Stakeholders' views on the degree of clarity of the EGF's objective.</p> <p>Stakeholders' views on the degree to which relevant stakeholders are aware of the EGF in their MS.</p> <p>Degree to which the European Commission advertises the EGF.</p>	<p>Member States take full advantage of the support provided by EGF</p> <p>Increase in the number of applications received by MS/year</p> <p>Increase in absorption rate of EGF funds</p> <p>Beneficiaries take full advantage of the support offered to them through EGF</p> <p>Member States offer EGF support to all eligible beneficiaries</p>	<p>Literature and data review</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p> <p>Targeted interviews</p> <p>Online beneficiary survey</p>

	<p>Did cases use all the EGF funds received from the Commission?</p> <p>If not, why not?</p> <p>What are the factors that encourage targeted workers to accept/refuse EGF support offered by their Member State?</p> <p>To what extent have Member States paid attention to vulnerable beneficiaries when designing the coordinated package of active labour market measures?</p> <p>Has the principle of fairness been upheld?</p>	<p>Degree to which the relevant stakeholders at national level advertise/communicate on the EGF.</p> <p>Absorption rate of EGF funds (MS/instrument level)</p> <p>Proportion of EGF funds unspent (MS/instrument level)</p> <p>Stakeholder views on barriers to absorption of EGF funds at the level of cases.</p> <p>Enabling factors for applying for EGF (qualitative feedback)</p> <p>Hindering factors for applying for EGF (qualitative feedback)</p> <p>Number of dismissed workers / self-employed persons who ceased their activity targeted.</p> <p>Number of older unemployed people targeted.</p> <p>Number of women (as a proportion of workers) targeted.</p>	<p>Member States pay attention to the needs of the most vulnerable beneficiaries (women, young/old employees)</p>	
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		<p>Number of dismissed workers / self-employed persons with lower secondary education or less</p> <p>Number of dismissed workers / self-employed persons with upper secondary (ISCED 3) or post-secondary education</p> <p>Number of dismissed workers / self-employed persons with higher education</p>		
EQ.1.2: To what extent does the broadened scope <sup>(130)</sup> make the EGF fairer and more inclusive?	<p>Does the broadened scope encourage Member States to apply for EGF support?</p> <p>Does its broadened scope make the EGF fairer and allow to reach more potential beneficiaries?</p> <p>If not, why not?</p>	<p>Stakeholders views on the broadened scope of the EGF</p> <p>Number of applications received by MS/year</p> <p>Number of applications approved by MS/year (leveraged EU spending to support dismissed workers)</p> <p>Enabling factor for applying for EGF (qualitative feedback)</p>	<p>Member States take full advantage of the broadened scope provided by EGF</p> <p>Increase in the number of applications received by MS/year</p> <p>More inclusive and fairer EGF in absorption rate of EGF funds</p>	<p>Data review</p> <p>Targeted interviews of national and EU stakeholders involved in designing, managing and delivering EGF</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p>

<sup>(130)</sup> See Section 2.1 above of SWD.

		Hindering factor for applying for EGF (qualitative feedback)		
EQ.1.3: To what extent do the modified intervention criteria <sup>(131)</sup> make the EGF more accessible?	<p>Do the modified intervention criteria:</p> <p>At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in an enterprise in a Member State;</p> <p>At least 200 displaced workers (or self-employed persons activity ceasing) over a reference period of 6 months in enterprises, especially SMEs that belong to the same sectors in one or two adjoining regions;</p> <p>At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in enterprises, especially SMEs that belong</p>	<p>Stakeholders views on the modified intervention criteria</p> <p>Number of applications received by MS/year</p> <p>Number of applications approved by MS/year (leveraged EU spending to support dismissed workers)</p> <p>Enabling factor for applying for EGF (qualitative feedback)</p> <p>Hindering factor for applying for EGF (qualitative feedback)</p>	<p>Member States take full advantage of the modified intervention criteria provided by EGF</p> <p>Increase in the number of applications received by MS/year</p> <p>Increase in absorption rate of EGF funds</p>	<p>Data review</p> <p>Targeted interviews of national and EU stakeholders involved in designing, managing and delivering EGF</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p>

<sup>(131)</sup> See Section 2.1 above of SWD.

	<p>to the same of different sectors in the same region.</p> <p>encourage Member States to apply for EGF support?</p> <p>Do the modified intervention criteria of the EGF make it more accessible?</p> <p>If not, why not?</p>			
EQ 1.4: To what extent is the alignment of the EGF co-financing rate with the ESF+ (while maintaining 60% as the minimum threshold) appropriate?	<p>Is the aligned EGF co-financing rate with the ESF+ (while maintaining 60% as the minimum threshold) of the cost of the package and its implementation appropriate?</p> <p>Does the modified EGF co-financing rate remove obstacles in applying and encourage Member States to apply for EGF support?</p> <p>Has the modified EGF co-financing rate made the fund fairer and reach more potential beneficiaries?</p>	<p>Stakeholder views on the appropriateness and fairness of the 2021-2027 co-financing rate.</p> <p>Enabling factor for applying for EGF (qualitative feedback)</p> <p>Hindering factor for applying for EGF (qualitative feedback)</p>	<p>The co-financing rate is sufficient to cover all expenses incurred</p> <p>The aligned EGF co-financing rate encourages MS to apply</p>	<p>Literature and data review</p> <p>Targeted interviews of national and EU stakeholders involved in designing, managing and delivering EGF</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p>

EQ 1.5: At case level, did the support offered and the way it is being offered correspond to the needs of the beneficiaries and their specific profiles?	<p>To what degree was the support available via EGF cases well-tailored to the actual needs of beneficiaries?</p> <p>To what degree was the support offered and the way it is offered in line with the needs of unemployed women, young and older unemployed people?</p> <p>To what degree is the support offered and the way it is offered in line with the needs of persons at an increased risk of poverty?</p>	<p>Number of workers receiving:</p> <p>Job-search assistance and counselling</p> <p>Training allowances</p> <p>Employment incentives</p> <p>Training/re-training</p> <p>Entrepreneurship/start-up incentives</p> <p>Other financial assistance</p> <p>Stakeholder views on how far EGF support offered corresponds to the needs of beneficiaries and their specific profiles at the level of cases.</p>	<p>The support offered through EGF responds to the needs of its beneficiaries</p>	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>
EQ.1.6: To what extent does the requirement to include measures focusing on skills required in the digital industrial age and in a resource-efficient economy	To what extent have the EGF beneficiaries gained new skills or competences required in the digital	Number of EGF beneficiaries who participated in measures focusing on skills and competences required in the digital industrial age	The support offered through EGF to beneficiaries has updated their skills and competences with those required in the digital	<p>Literature and data review</p> <p>Targeted interviews of national stakeholders involved in designing,</p>



help update the skills and competences of the beneficiaries?	<p>industrial age and in a resource-efficient economy?</p> <p>For the EGF beneficiaries who found a job after participating in EGF measures, to what extent have the new skills been helpful in the new job?</p>	<p>Number of EGF beneficiaries who participated in measures focusing on skills and competences required in the resource-efficient economy</p> <p>Number of EGF beneficiaries who found the new digital and/or green skills helpful in the new job</p> <p>Views of stakeholders (namely delivery partners and beneficiaries themselves) around new skills gained required in the digital industrial age and in a resource-efficient economy.</p> <p>Views of stakeholders (namely delivery partners and beneficiaries themselves) on the degree to which EGF support was more effective than national measures, and reasons why.</p> <p>Views of stakeholders on the degree to which EGF funding alters the type of support made available to redundant workers by Member States</p>	industrial age and in a resource-efficient economy	<p>managing and delivering EGF</p> <p>Online survey of beneficiaries</p>
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<p>EQ 1.7: What were the new factors that helped or hindered EGF cases achieve their objectives?</p>	<p>What are the new factors that help EGF cases achieve their objectives?</p> <p>What are the new factors that hinder EGF cases from achieving their objectives?</p> <p>What challenges – if any – exist at the level of cases? And how were these tackled?</p> <p>To what extent was learning from previous EGF cases utilised to inform case design and implementation?</p> <p>To what extent was EGF assistance successfully integrated with other support systems?</p> <p>To what degree was a coordinated approach to the delivery of EGF assistance adopted for individual cases?</p>	<p>Stakeholders views at case level on the factors that help EGF cases achieve their objectives.</p> <p>Stakeholders views at case level on the factors that hinder EGF cases achieve their objectives.</p> <p>Stakeholders provide concrete examples of how the challenges identified have been tackled.</p> <p>Stakeholder views at case level on impact learning from previous EGF cases on ongoing case design and implementation.</p> <p>Stakeholder views on integration of EGF assistance into other support systems.</p> <p>Evidence of a coordinated approach to EGF assistance for individual cases.</p>	<p>Challenges encountered during case implementation are regularly identified and promptly tackled</p>	<p>Literature and data review</p> <p>Targeted interviews</p>
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EQ 1.8: To what extent were case-specific objectives established and monitored? Were the national monitoring systems timely and effective?	<p>To what extent were case-specific objectives/aims defined and monitored?</p> <p>If yes, do they go beyond the aim to contribute to achieving the labour market re-integration of dismissed workers?</p> <p>To what degree is there variation in the aims across the cases between beneficiaries targeted / type of activities etc.?</p> <p>What were the national monitoring requirements in terms of data collected; frequency of data collection etc.?</p> <p>Was the monitoring conducted at regular intervals, allowing for an assessment of trends over time?</p> <p>Was monitoring data received on time?</p>	<p>Degree to which case-specific aims have been defined and monitored at case level.</p> <p>Stakeholders' views on the degree to which the specific aims identified have been defined.</p> <p>Degree to which variations exists across cases, stakeholders and activity types in the case-specific objectives.</p> <p>Existence of monitoring data gaps at case level.</p> <p>Reported delays in receipt of case-specific monitoring data.</p> <p>Degree to which a national monitoring system was in place / external evaluations are undertaken.</p> <p>Frequency/rate of delays in receiving national monitoring data.</p> <p>Stakeholders' views on the functioning of the national monitoring system.</p>	<p>Case-specific objectives / aims are developed and monitored</p> <p>National monitoring systems are in place and are timely and effective</p>	<p>Literature and data review</p> <p>Targeted interviews</p>
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	How were monitoring requirements communicated to Member States - was there clarity around the type of data that needs to be collected?			
EQ 1.9: How reliable was the data collected and was it sufficient?	<p>To what degree were there unexpected gaps; duplications; inconsistencies; or anomalies in reported data?</p> <p>How comparable was the data collected between cases and Member States?</p> <p>How far did the reliability of data collected vary between (a) cases and (b) Member States?</p> <p>Should more data per case be gathered in order to provide a complete picture of EGF results?</p>	<p>National experts' / evaluators' assessment of the completeness, quality and comparability of the data collected.</p> <p>Stakeholder views on data collection requirements – practical views on requirements from case level and general views from the instrument perspective.</p>	The data collected at the national level was reliable and sufficient to conduct meaningful analyses and comparisons across Member States	<p>Literature and data review</p> <p>Targeted interviews</p>
EQ 1.10: At instrument level, did the modified EU or	To what extent did the modified decision-making procedures act as a barrier to	Average time between application and implementation per Member State.	EU/national procedures in place ensured a swift and resource-efficient	<p>Literature and data review</p> <p>Targeted interviews</p>

national procedures <sup>(132)</sup> in place ensure a swift and resource saving decision-making process and thus a quick implementation?	<p>Member States applying for funding?</p> <p>What impact did the length of decision-making procedures have on the implementation of the case?</p> <p>To what degree can the decision-making procedure around the granting of EGF support be linked to delays in case implementation?</p>	<p>Decreased average time for decision-making process per Member State.</p> <p>Stakeholder views on decision-making procedure.</p> <p>Proportion of cases reporting delays in final reports submitted by Member States.</p>	decision-making process (quick implementation)	Online survey of EGF contact persons in Member States which did not apply for EGF funding
EQ 1.11: How effective was the EGF support for beneficiaries?	<p>To what extent have EGF beneficiaries found permanent/temporary employment as a result of EGF support?</p> <p>To what extent was the outcome for EGF beneficiaries sustainable?</p> <p>To what extent have the EGF beneficiaries gained new skills?</p>	<p><i>Percentage of EGF beneficiaries in employment (if possible, broken down by type of employment contract: full time/part time, fixed term/open-ended) and self-employment, 6 months after the end of the implementation period.</i></p> <p><i>Percentage of EGF beneficiaries gaining a qualification 6 months after the end of the implementation period</i></p>	The EGF support provided to beneficiaries was effective in providing the support needed	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>

<sup>(132)</sup> See Section 2.1 above of SWD.

	<p>To what extent was the EGF more effective than national level measures to support redundant workers?</p> <p>To what extent did EGF funding alter the type of support made available to redundant workers by Member States?</p>	<p><i>Percentage of EGF beneficiaries in education or training 6 months after the end of the implementation period</i></p> <p>Views of stakeholders (namely delivery partners and beneficiaries themselves) around new skills gained – including “soft” skills.</p> <p>Views of stakeholders (namely delivery partners and beneficiaries themselves) on the degree to which EGF support was more effective than national measures, and reasons why.</p> <p>Views of stakeholders on the degree to which EGF funding alters the type of support made available to redundant workers by Member States</p>		
EQ 1.12: How and to what extent has the EGF support had a short-term and medium-term impact on individual participants?	<p>What was the labour market status of assisted workers at the end of the implementation period?</p> <p>What was the labour market status of assisted workers</p>	<p>Percentage of beneficiaries in employment immediately after the end of the implementation period.</p> <p>Percentage of beneficiaries in education or training immediately</p>	<p>The EGF support provided had short-term impacts on individual beneficiaries</p> <p>The EGF support provided had medium-</p>	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>

	<p>twelve months after submission of the final report of each case?</p>	<p>after the end of the implementation period.</p> <p>Percentage of beneficiaries with permanent employment contracts.</p> <p><i>Percentage of EGF beneficiaries in employment 6 months after the end of the implementation period</i></p> <p><i>Percentage of EGF beneficiaries gaining a qualification 6 months after the end of the implementation period</i></p> <p><i>Percentage of EGF beneficiaries in education or training 6 months after the end of the implementation period</i></p>	<p>term impacts on individual beneficiaries</p>	
EQ 1.13: Were there any unexpected or unintended effects linked to the implementation of EGF measures?	To what degree did the ultimate effects of the fund go beyond its intended aims?	Views of stakeholders across all levels on the existence of unexpected or unintended effects (qualitative feedback)	Presence of unexpected effects linked to the implementation of EGF measures	Targeted interviews / s  Online survey of beneficiaries
EQ 1.14: How do the impacts observed compare with those achieved by:	How do the impacts for EGF beneficiaries compare to other targeted redundant workers	Labour market status of individuals who received EGF support compared to individuals who did not receive EGF support at the end of the implementation	Differences and similarities between impacts achieved by EGF and:	

<p>(a) individuals who did not receive EGF support (the control group when available);</p> <p>(b) similar re-employment projects at national or regional level?</p>	<p>who have not received the same support?</p> <p>How do the overall impacts of EGF support compare with the impact of support available at national or regional level?</p>	<p>period and twelve months after intervention.</p> <p>Nature of re-employment of individuals who received EGF support compared to other redundant workers (<i>broken down by type of employment contract: full time/part time, fixed term/open-ended</i>) and self-employment</p>	<ul style="list-style-type: none"> <li>Those who did not receive any form of support</li> <li>Similar re-employment schemes at national/regional level</li> </ul>	
<p>EQ 1.15: To the extent of available evidence, what are the long-term effects generated by the EGF cases?</p>	<p>What proportion of EGF beneficiaries have been re-employed for 6 months or more?</p> <p>What proportion of EGF beneficiaries have been re-employed on a permanent basis as opposed to temporary or fixed-term basis?</p> <p>What proportion of EGF beneficiaries are engaged in education or training activities for 6 months or more following engagement with an EGF case?</p>	<p><i>Percentage of EGF beneficiaries in employment, including self-employment, 6 months after the end of the implementation period specified in the financing decision</i></p> <p>Rate of sustained engagement with education or training activities of EGF beneficiaries 6 months after receiving support.</p> <p>Stakeholder views on increased employability of beneficiaries</p> <p>Stakeholder views on long-term effects generated for organisations delivering EGF</p>	<p>The EGF support provided had long-term impacts on individual beneficiaries and organisations delivering support</p>	<p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>



	<p>To what degree do beneficiaries as well as employers report increased employability of redundant workers?</p> <p>To what extent are there long-term effects generated for organisations delivering EGF support in terms of being better placed to deliver support to redundant / unemployed workers?</p> <p>To what extent are their new jobs better? E.g. higher salaries, more responsibilities, etc.</p>	support in terms of being better placed to deliver support		
EQ 1.16: How informative is the EGF beneficiary survey?	<p>Does the beneficiary survey reach more people than a public consultation?</p> <p>Does it ask useful questions for providing qualitative information about the EGF beneficiaries?</p>	<p>Number of beneficiaries replying to the beneficiary survey</p> <p>Stakeholder views on effectiveness of the beneficiary survey</p> <p>Stakeholder views on information provided by the replies to the beneficiary survey</p>	<p>The EGF beneficiary survey is effective by asking useful questions to get information from beneficiaries</p> <p>More replies received via the EGF beneficiary survey than in previous public consultations.</p>	EGF beneficiary survey

EQ 1.17: What lessons have been drawn or could be drawn from EGF implementation, both by the Commission as well as by national, regional and local authorities?	<p>To what extent did EGF help in mainstreaming innovative ideas?</p> <p>To what extent did EGF help in (re)designing other active labour market policy instruments?</p> <p>To what extent have there been important learning from the EGF and its implementation which have been/ could be applied in the Commission or in national / regional / local authorities?</p>	<p>Stakeholder views on lessons learnt from EGF implementation at both case and instrument level.</p> <p>Stakeholder views on important learning from EGF implementation at both case and instrument level</p>	Availability of key lessons to be shared and provide common learning on EGF implementation (successes and failures)	Targeted interviews
EQ 1.18. To what extent have social partners contributed to the design and provision of coherent support packages?	<p>What proportion of social partners involved in dismissals have contributed to the design of training and other support measures for re-employment?</p> <p>What proportion of social partners involved in dismissals have contributed to the delivery of training and</p>	<p>Stakeholders' views on the extent to which social partners have been involved in dismissals that contributed to the design of training and other support measures for re-employment</p> <p>Stakeholders' views on the extent to which social partners have been involved in dismissals that contributed to the delivery of</p>	Social partners actively contribute to the design and provision of coherent support packages	Targeted interviews

	other support measures for re-employment?	training and other support measures for re-employment		
EQ 1.19. To what extent have companies contributed to the design and provision of coherent support packages?	<p>What proportion of companies involved in dismissals have contributed to the design of training and other support measures for re-employment?</p> <p>What proportion of companies involved in dismissals have contributed to the delivery of training and other support measures for re-employment?</p>	<p>Stakeholders' views on the extent to which companies have been involved in dismissals that contributed to the design of training and other support measures for re-employment</p> <p>Stakeholders' views on the extent to which companies have been involved in dismissals that contributed to the delivery of training and other support measures for re-employment</p>	Companies actively contribute to the design and provision of coherent support packages	Targeted interviews / s
EQ 1.20. To what extent have Member States incentivised local companies to employ dismissed workers?	<p>What proportion of local companies were provided with incentives to hire dismissed workers?</p> <p>What proportion of companies that have been offered incentives by MS have accepted them?</p> <p>What proportion of dismissed workers were hired by incentivised local companies?</p>	<p>Number of companies that were offered incentives to hire dismissed workers</p> <p>Number of companies that agreed to hire dismissed workers</p> <p>Number of dismissed workers hired by local companies that received State incentives</p>	Member States regularly incentivise local companies to re-hire dismissed workers	Targeted interviews / s

<p>EQ 1.21: What was the overall impact of EGF? (based on results of previous questions)</p> <ul style="list-style-type: none"> <li>• Instrument level</li> <li>• Case level</li> </ul>	<p>To what extent has the EGF had its desired impact, i.e.: to demonstrate solidarity towards workers made redundant and to ensure for each EGF case that the largest possible number of beneficiaries find sustainable employment as soon as possible?</p> <p>To what extent has the EGF instrument been able to effectively provide emergency, targeted support to dismissed workers across Europe?</p>	<p>Composite indicator (EQ 1.1 – 1.24)</p>	<p>The EGF achieved its desired impact overall at instrument and case level</p>	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>
<p>EQ 1.22: To what extent have the information and communication activities of</p> <ul style="list-style-type: none"> <li>• the Commission</li> <li>• Member States</li> </ul> <p>proven useful and reached the dismissed workers and Union Citizens?</p>	<p>How far do the information and communication activities of the Commission reach some groups relative to others?</p> <p>How far do the information and communication activities of Member States reach some groups relative to others?</p> <p>What are the most effective information and</p>	<p>Level of awareness of information and communication activities organised by the Commission amongst:</p> <ul style="list-style-type: none"> <li>• dismissed workers receiving support via the EGF</li> <li>• dismissed workers receiving support from other EU and/or national resources</li> </ul>	<p>The information and communication activities of the Commission have proved useful</p> <p>Key stakeholders are aware of the EGF</p> <p>Dismissed workers and Union Citizens are aware of the EGF</p>	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>

	<p>communication channels at EU level e.g. multilingual website; networking events; social media campaigns etc.?</p> <p>What are the most effective information and communication channels at national level e.g. multilingual website; networking events; social media campaigns etc.?</p> <p>Have the seminars organised by the Commission proved helpful and what can be improved?</p> <p>Have the seminars organised by Member States proved helpful and what can be improved?</p> <p>To what degree have the networking seminars organised by the Commission facilitated learning and information exchange between various EGF stakeholders?</p>	<ul style="list-style-type: none"> <li>• Union citizens.</li> </ul> <p>Level of awareness of information and communication activities organised by Member States amongst:</p> <ul style="list-style-type: none"> <li>• dismissed workers receiving support via the EGF</li> <li>• dismissed workers receiving support from other EU and/or national resources</li> <li>• Union citizens.</li> </ul> <p>Attendance rate of different stakeholders / stakeholder groups at networking seminars organised by the Commission between 2021-2024.</p> <p>Degree of consensus among stakeholders (including targeted beneficiaries; local and regional authorities etc.) on:</p> <ul style="list-style-type: none"> <li>• how helpful seminars organised by the Commission have been</li> </ul>	<p>The seminars organised by the Commission have proven to be helpful learning tools</p>	
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	<p>How far have the networking seminars been attended by EGF stakeholders from a range of groups and Member States? Has there been any over or underrepresentation in terms of EGF stakeholder groups or countries present?</p>	<ul style="list-style-type: none"> <li>• usefulness of information and communication activities of the Commission by type <sup>(133)</sup></li> </ul> <p>Degree of consensus among stakeholders (including targeted beneficiaries; local and regional authorities etc.) on the usefulness of information and communication activities of Member States type <sup>(134)</sup></p> <p>Evidence of network building; information exchange around cases; mutual learning linked to:</p> <ul style="list-style-type: none"> <li>• networking seminars</li> <li>• information and communication activities of the Commission</li> <li>• information and communication activities of Member States</li> </ul>		
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<sup>(133)</sup> i.e. multilingual website; networking events; social media campaigns etc.

<sup>(134)</sup> i.e. multilingual website; networking events; social media campaigns etc.

Efficiency (EQ 2): To what extent were the results of the EGF per beneficiary cost-efficient? Are there significant differences in EGF cost-efficiency between and within Member States and per economic sector defined at NACE Revision 2 division level? If so, what is causing them? And how do these differences relate to the EGF support as a whole?

EQ 2.1: To what extent were the results of the EGF per beneficiary cost-efficient?	<p>To what extent is the level of resources used to support each redundant worker by the EGF is comparable to that used for national measures to support such individuals' reintegration into the labour market or education/training?</p> <p>Are there more cost-effective responses to job losses than the EGF?</p> <p>Are there significant differences in EGF cost-efficiency between and within Member States?</p> <p>Are there significant differences in EGF cost-efficiency per economic sector defined at NACE Revision 2 division level?</p> <p>If so, what is causing them? And how do these differences</p>	<p>Degree to which the level of resources used to support each redundant worker by the EGF is comparable to that used for national measures to support such individuals' reintegration into the labour market or education/training.</p> <p>Degree to which there are differences in cost-efficiency across Member States and reasons for this.</p> <p>Degree to which there are differences in cost-efficiency within Member States, across cases and measures, and reasons for this.</p> <p>Degree to which there are differences in cost-efficiency per economic sector defined at NACE Revision 2 division level, and reasons for this.</p>	<p>The results of the EGF per beneficiary are cost-efficient</p>	<p>Literature and data review</p> <p>Targeted interviews</p>
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	<p>relate to the EGF support as a whole?</p>	<p>Stakeholders' views on the extent to which the level of resources used to support each redundant worker by the EGF is comparable to that used for national measures to support such individuals' reintegration into the labour market or education/training.</p> <p>Stakeholders' views on the extent to which there are more cost-effective responses to job losses than the EGF.</p> <p>Stakeholders' views on reasons for differences in costs across cases and measures in given Member States.</p> <p>Degree to which any differences in cost-efficiency identified are reflected in EGF funding at instrument level.</p>		
EQ 2.2: At case level, to what extent could the same results have been achieved with fewer resources and/or in a shorter period of time?	<p>Could alternative ways have been more efficient and what are those?</p> <p>How far could fewer resources have been used at</p>	<p>Implementation costs (as % of total costs)</p> <p>Timing of application (after the reference period)</p>	The same results could not have been achieved with fewer resources or in less time	<p>Literature and data review</p> <p>Targeted interviews</p>



	<p>the level of cases to achieve the same results?</p> <p>How far could the same results have been achieved at case level in a shorter period of time?</p> <p>What – if any – options or barriers exist to reduce the resources used at the level of cases to achieve the same results per case?</p> <p>What – if any – options or barriers exist to reduce the amount of time required to achieve the same results per case?</p>	<p>Length of application process</p> <p>Timing of re-employment measures (after the application date)</p> <p>Length of re-employment measures</p> <p>Extent to which the same results could have been achieved with fewer resources and/or in a shorter period of time (qualitative feedback)</p> <p>Extent to which stakeholders identify options for increasing efficiency in achieving results at case level (qualitative feedback)</p> <p>Extent to which stakeholders identify barriers to for increasing efficiency at case level (qualitative feedback)</p>		
EQ 2.3: At case level, to what extent are the costs incurred justified, given the benefits which have been achieved?	-	Total cost (or total EGF contribution) / number of targeted beneficiaries	The costs incurred at the case level are justified, vis-à-vis the benefits achieved	<p>Literature and data review</p> <p>Targeted interviews</p>

		<p>Total cost (or total EGF contribution) / number of reached beneficiaries</p> <p>Total cost (or total EGF contribution) / number of beneficiaries re-employed or returned to education/training</p> <p>Extent to which the costs incurred are justified (qualitative feedback)</p>		
EQ 2.4: What is the overall and case by case absorption rate of the funding support given from EGF to Member States?	<p>Does the absorption rate of EGF funding vary between Member States? Why?</p> <p>Does the absorption rate of EGF funding vary between cases within Member States? Why?</p> <p>To what degree does the absorption rate of EGF funding vary in relation to the <i>type</i> of support measures offered? <sup>(135)</sup></p>	<p>Absorption rate of EGF funding support overall.</p> <p>Absorption rate of EGF funding support per case.</p> <p>Absorption rate of EGF funding by <i>type</i> of support measures offered.</p> <p>Absorption rate of EGF funding by <i>sector</i> supported.</p>	Minimum/Maximum absorption rates, overall and on a case by case basis.	Literature and data review

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<sup>(135)</sup> e.g. individual job search assistance; training and retraining; job search allowances etc.

	To what degree does the absorption rate of EGF funding vary in relation to the <i>sector</i> supported?			
EQ 2.5: At instrument level, to what extent do the changes introduced in the 2021-2027 period improve efficiency?	<p>To what degree is there an administrative burden associated with the simplified application procedure for EGF support for Member States?</p> <p>To what degree is there an administrative burden for the Commission, associated with the simplified assessment of the applications received?</p> <p>To what degree is there an administrative burden for the Commission, associated with proposing a Decision to mobilise the EGF to the Budgetary Authority for accepted applications?</p> <p>To what extent are reporting requirements imposed on Member States on the execution of the financial contribution from the EGF</p>	<p>Stakeholders' views on the degree to which the application process was burdensome.</p> <p>Stakeholders' views on the degree to which the nature of the application process acted as a barrier to applying.</p> <p>Comparison of EGF application and reporting requirements with similar programmes and or active labour market policies or measures at EU and national level.</p>	The procedures are efficient	<p>Literature and data review</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p> <p>Targeted interviews</p>

	more or less demanding than other similar programmes?			
Coherence (EQ 3): How coherent is the EGF intervention with other European Union programmes and national instruments?				
EQ 3.1: How coherent is the EGF intervention with other European Union programmes?	Does the EGF complement or add to other EU programmes?	Extent to which the EGF is additional to / complements other European Union instruments including the ESF, YEI.	The EGF and other European Union programmes are coherent and complement each other	Literature and data review
EQ 3.2: How coherent is the EGF intervention with other national instruments?	Does the EGF complement or add to other national instruments?	Extent to which the EGF is additional to / complements comparable national instruments in Member States.	The EGF and other national instruments are coherent and complement each other	Literature and data review
EQ 3.3: At instrument and case level, to what extent have Member States ensured the complementarity of EGF support with other European Union instruments, such as the European Social Fund, the Recovery and Resilience Facility, or national instruments in Member States?	<p>What – if any – mechanisms are in place to foster complementarity / prevent overlap between the EGF and other European Union instruments, such as the ESF and YEI?</p> <p>What – if any – mechanisms are in place to foster complementarity / prevent overlap between the EGF and national instruments in Member States?</p>	<p>Extent to which individual cases are complementary with outputs of comparable European Union instruments / national instruments in Member States.</p> <p>Existence of mechanisms to support complementarity.</p>	Member States have ensured the complementarity between EGF support and other European/national instruments	<p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p> <p>Targeted interviews</p>

	What – if any – mechanisms are in place to foster complementarity / prevent overlap between individual EGF cases and the outputs of other similar EU instruments or national instruments in Member States?			
EQ 3.4: If applicable, are there any lessons learned for ensuring complementarity?	-	Extent to which complementarity with other EU and/or national level initiatives can be ensured	Best practices are available on how to ensure complementarity	Targeted interviews
EQ 3.5: At case level, to what extent have there been overlaps between EGF support and other interventions in the Member States?	<p>How far does EGF support overlap with similar interventions at Member State level?</p> <p>If overlaps exist – to what extent could they be considered complementary?</p> <p>What mechanisms – if any – are in place to avoid overlaps between EGF support and other similar interventions at Member State level. <sup>(136)</sup></p>	<p>Presence / absence of overlaps.</p> <p>Presence / absence of mechanisms to avoid overlaps.</p> <p>Specific reasons for overlaps.</p> <p>Impact of overlaps (qualitative feedback)</p>	<p>At case level, Member States have avoided overlap with other national interventions</p>	<p>Literature and data review</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p> <p>Targeted interviews</p>

<sup>(136)</sup> e.g. existence of formal or non-formal dialogue with organisers of other similar interventions at national level; multi-stakeholder working groups with a shared focus; mutual sharing of results and best practices as well as gaps and challenges at national / regional level with a focus on supporting the reintegration of vulnerable workers etc.

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Relevance (EQ 4): How relevant is the EGF?				
EQ 4.1: To what extent are the broadened scope <sup>(137)</sup> of the EGF appropriate and useful for its aims?	<p>Does it make sense to mobilise the EGF support available in case of any major restructuring events, no matter the cause?</p> <p>Does it make the EGF more accessible?</p>	<p>Number of restructuring job losses as a result of major structural changes in world trade patterns due to globalisation, the impact of the global and financial and economic crisis.</p> <p>Number of restructuring job losses as a result of other reasons, such as automation, digitalisation or transition to low-carbon economy.</p> <p>Extent to which the scope has limited access to funding for otherwise relevant cases for achieving the EGF overall objectives (qualitative feedback)</p>	The scope of the EGF Regulation was appropriate and useful for its aims	<p>Literature and data review</p> <p>Targeted interviews</p> <p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p>
EQ 4.2: To what extent are the updated intervention criteria <sup>(138)</sup> of the EGF as defined in Regulation (EU)	To what extent were are the following criteria appropriate and useful:	Number of redundant workers meeting the current threshold as a	The intervention criteria set out in the EGF Regulation were appropriate and useful	<p>Literature and data review</p> <p>Targeted interviews</p>

<sup>(137)</sup> See Section 2.1 above of SWD.

<sup>(138)</sup> See Section 2.1 above of SWD.

<p>2021/691 appropriate and useful for its aims?</p>	<p>At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in an enterprise in a Member State;</p> <p>At least 200 displaced workers (or self-employed persons activity ceasing) over a reference period of 6 months in enterprises, especially SMEs that belong to the same sectors in one or two adjoining regions;</p> <p>At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in enterprises, especially SMEs that belong to the same of different sectors in the same region.</p> <p>Having small labour markets being eligible provided that the redundancies have a serious impact on the local,</p>	<p>proportion of all redundant workers per Member State.</p> <p>Size of major restructuring events as a result of major structural changes in world trade patterns due to globalisation, the continued impacts of the global financial and economic crisis or other reasons for restructuring job losses, such as automation, digitalisation or transition to low-carbon economy.</p> <p>Extent to which the intervention criteria have limited access to funding for otherwise relevant cases, e.g. in terms of the impact they can have on a given region/MS, for achieving the EGF overall objectives</p> <p>Stakeholders' views on the appropriateness of the intervention criteria</p>	<p>for its aims during the 2021-2027 period</p>	<p>Online survey of EGF contact persons in Member States which did not apply for EGF funding</p>
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	<p>regional or national economy and on employment.</p> <p>To what extent was the threshold of redundant workers as defined in Regulation (EU) 2021/691 appropriate and useful for its aims?</p> <p>To what extent should support be provided to both redundant and self-employed persons whose activity has ceased?</p> <p>To what extent was the four/six-month reference period appropriate?</p>			
EU added value (EQ 5): What is the EU added value of the EGF intervention?				
EQ 5.1: At case level, what is the EU added value of the EGF intervention?	<p>Volume effects: Has EGF added to, or supported, existing actions or policy areas?</p> <p>Scope effects: Has the EGF broadened existing actions by supporting groups or policy</p>	Views of stakeholders on the degree to which EGF has added to, or supported, existing actions or policy areas.	The EGF has EU added value at case level	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>



	<p>areas that would not have received support otherwise?</p> <p>Role effects: Have lessons learnt from the implementation of EGF been applied elsewhere?</p> <p>Process effects: Has the EGF improved/changed operational processes and the implementation of support measures for redundant workers including in relation to other national or European sources of funding?</p>			
EQ 5.2: At instrument level, what is the EU added value of the EGF intervention?	<p>Volume effects: Has EGF added to, or supported, existing actions or policy areas?</p> <p>Scope effects: Has the EGF broadened existing actions by supporting groups or policy areas that would not have received support otherwise?</p> <p>Role effects: Have lessons learnt from the</p>	Views of stakeholders on the degree to which EGF has added to, or supported, existing actions or policy areas.	At instrument level, the EGF has EU added value	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>

	<p>implementation of EGF been applied elsewhere?</p> <p>Process effects: Has the EGF improved/changed operational processes and the implementation of support measures for redundant workers including in relation to other national or European sources of funding?</p>			
EQ 5.3: To what extent does the aid offered by the EGF replace or complement measures or allowances which the Member State would provide in the absence of EGF funding?	<p>What other measures or allowances are available for EGF beneficiaries beyond EGF support?</p> <p>Has the existence of the EGF affected the scope and scale of other comparable measures or allowances to support workers made redundant at national and regional level?</p> <p>To what extent has EGF funding replaced or complemented measures that were being/would have been offered by Member States?</p>	<p>Existence of comparable measures or allowances for supporting workers made redundant in Member States.</p> <p>Views of stakeholders on the degree to which funding offered by the EGF replaces measures that the Member State would provide in the absence of EU funding.</p> <p>Views of stakeholders on the degree to which funding offered by the EGF replaces allowances that the Member State would provide in the absence of EU funding.</p>	The aid offered by the EGF substitutes/complements (partially or entirely) national measures	<p>Literature and data review</p> <p>Targeted interviews</p>

EQ 5.4: Were there any cross-region and/or cross-border effects of the EGF cases implemented?	<p>What proportion of EGF beneficiaries found work in a region other than their region of residence (whilst remaining in the same country)?</p> <p>What proportion of EGF beneficiaries found work in a country other than their country of residence?</p> <p>What was the planned EGF expenditure on cross-region and/or cross-border mobility allowances per case / Member State?</p> <p>What was the actual EGF expenditure on cross-region and/or cross-border mobility allowances case / Member State?</p>	<p>Proportion of workers (re)integrated into cross-border employment as opposed to employment within their region/country of residence.</p> <p>Amount of mobility allowance distributed via the EGF.</p> <p>Stakeholder views on cross-border effects of EGF cases</p>	<p>The EGF implementation resulted in cross-border effects (across regions and/or across countries)</p>	<p>Literature and data review</p> <p>Targeted interviews / s</p> <p>Online survey of beneficiaries</p>
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**ANNEX IV. OVERVIEW OF BENEFITS AND COSTS [AND, WHERE RELEVANT, TABLE ON SIMPLIFICATION AND BURDEN REDUCTION]**

<i>Table 1. Overview of costs and benefits identified in the evaluation<sup>139</sup></i>									
	Citizens/Consumers		Businesses		Administrations		Beneficiaries		
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	
<b>Due to early stage of implementation costs and benefits of EGF could not be analysed.</b>									
<b>Mark the type of cost/benefit, each on a separate line:</b>		N/A	N/A	N/A	N/A	-	-	-	-

<sup>139</sup> Where there is a prior impact assessment, the table should contain as a minimum the costs/benefits identified in the IA with the information gathered on the actual cost/benefit. As available, the table should include the monetisation (€) of the costs/benefits based on any quantitative translation of the data (time taken, person days, number of records/equipment/staff etc. affected or involved represented in monetary value – see Standard cost model, for example). For all information presented, it should be included in the comments section whether it relates to all Member States or is drawn from a subset. An indication of the robustness of the data should be provided in Annex II on Methodology and analytical models used.

**TABLE 2: Simplification and burden reduction (savings already achieved)**

Report any simplification, burden reduction and cost savings **achieved already** by the intervention evaluated, including the points of comparison/ where available (e.g. REFIT savings predicted in the IA or other sources).

	Citizens/Consumers/Workers		Businesses		Administrations		Beneficiaries	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
<b>Title<sup>140</sup></b> [Select among: (i) direct compliance cost savings (for example adjustment cost savings, administrative cost savings, savings from regulatory charges); (ii) enforcement cost savings (for example cost savings associated with activities linked to the implementation of an initiative such as monitoring, inspections and adjudication/litigation); (iii) indirect cost savings (if possible - for example indirect compliance cost savings or other indirect cost savings such as transaction cost savings).								
<b>Type: One-off / recurrent (select)</b>	N/A	N/A	N/A	N/A	-	-	-	-

**PART II: II Potential simplification and burden reduction (savings)**

Identify further potential simplification and savings **that could be achieved** with a view to make the initiative more effective and efficient without prejudice to its policy objectives<sup>141</sup>.

	Citizens/Consumers/Workers		Businesses		Administrations		Beneficiaries	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
<b>Description:</b> Increase simplification of the application process for Member States after the elimination of the requirement to demonstrate that the displacements occurred due to globalisation or a financial and economic crisis. Shorter deadlines for both Member States and the Commission, including the change of the deadlines, calculated in working days during 2021-2027 instead of calendar days calculation during 2014-2020. These changes led to a reduction in the approval time at EU level from 7.2 months during 2014-2020 to 5.5. months during 2021-2024.								
<b>Type: One-off / recurrent (select)</b>	N/A	N/A	N/A	N/A	-	-	-	-

<sup>140</sup> Each simplification/saving should be included on a separate line.

<sup>141</sup> This assessment is without prejudice to a possible future Impact Assessment.

## ANNEX V. STAKEHOLDERS CONSULTATION - SYNOPSIS REPORT

After approval by the Commission's Interservice Steering Group (ISSG), DG EMPL started conducting the consultations, and the results of all the consultation activities are covered by a synopsis report. All questionnaires used during the consultations were based on the evaluation questions discussed and approved by the ISSG beforehand. However, when drafting this staff working document, the Commission used the results of other specific consultations<sup>142</sup> to double check the validity of data.

### SYNOPSIS REPORT

#### 1. Overview of consultation strategy

To ensure that the general public interest of the Union – as opposed to special interests of stakeholder groups – is well reflected in this evaluation, and in the design and implementation of the EGF, the Commission regards it as a duty to conduct stakeholder consultations and consult the various stakeholders as widely as possible.

The aim of these stakeholder consultations related to the EGF mid-term evaluation was to deliver a high quality and credible assessment by allowing interested parties to provide feedback and suggestions on the relevance, effectiveness, efficiency, coherence, and EU added value of the EGF supported actions. This also ensured transparency and accountability.

#### 2. Call for evidence

The evaluation roadmap was published on the Commission's *Have your Say*<sup>143</sup> portal and made available for public feedback between 02 August 2024 and 06 September 2024. Six contributions (two from Germany and one each from Belgium, Sweden, Estonia and Czechia) were received and the findings were taken into account in the conclusions of this evaluation. Of all the stakeholders targeted (See Table 1 below), the feedback was received from public authorities (4 contributions) and citizens/general public (2 contributions).

#### 3. Stakeholder categories

The EGF stakeholders at all levels were consulted through a variety of means, ranging from a public consultation to online surveys and targeted interviews. Table 1 below presents an overview of the stakeholders targeted through each consultation tool/method.

- 1) **Workers' organisations/redundant workers:** Workers' organisations and workers themselves can be directly affected. The EGF's beneficiaries are redundant workers and the most important stakeholders on an individual basis, as well as the organisations representing them. Depending on the Member State, some of these organisations might also be involved in the implementation of EGF measures. The interest of the individual redundant worker is very high, but his/her influence rather low. The interest of the organisations representing the workers is also very high,

<sup>142</sup> Consultations carried out for the European Commission, DG EMPL by the external contractor Ernst & Young for the Study on the future of EMPL funds, due to be published in June 2025.

<sup>143</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14150-European-Globalisation-Adjustment-Fund-for-Displaced-Workers-mid-term-evaluation_en)

but their level of influence depends inter alia on the Member State and the level of involvement assigned to them in the implementation of EGF measures.

- 2) **Citizens/general public:** The general public constitutes the largest stakeholder group. On the one hand, the general public has an interest in how public funds are spent. On the other, even if not directly affected by EGF measures, any active labour market policy measure indirectly affects the general public. Due to the more indirect relation, and as the EGF is one of many active labour market policy instruments, the interest of this group is often low. Its influence is also quite low.
- 3) **Industry/business:** Even though the EGF does not provide any support to industry or businesses, they would have a general interest because of the EGF's nature as an active labour market policy instrument. Some organisations representing local business in an area affected by mass redundancies that fall under the EGF provisions, as well as organisations representing the interest of an industry strongly affected by globalisation or by the previous global financial and economic crisis, might however have a very high interest. The influence on the EGF measures is, however, usually low.
- 4) **NGOs:** NGOs that are not workers' organisations and do not represent industries or businesses might still have an interest in the EGF. This group can include special interest organisations with a focus on environmental or gender issues. Their interest would generally be rather low, except regarding the particular causes they represent. Their general influence on the EGF is also rather low.
- 5) **Private-sector bodies and professionals:** Private-sector bodies are in most cases involved in implementing EGF measures and so both their interest and influence are high. They may be training bodies, universities, consultancies, advisers and various experts such as medical professionals, psychologists, lawyers, engineers, business and financial advisers, etc.
- 6) **Public authorities:** Politicians and national governments have, by definition, a major influence on EGF measures. Each EGF case needs to be approved by the national managing authority, usually a senior civil servant or even a Minister, before submission to the Commission. The Commission proposal is then presented to the European Parliament and the Council. Due to the limited scope of the EGF, the overall interest of Member State public authorities is not considerable. The national EGF Managing Authorities, i.e. the Contact Persons of the EGF, have a very high interest by definition. They also have a high influence, as are responsible for designing EGF measures in their respective Member States, and are in permanent contact with the Commission. As regards local authorities in areas affected by EGF cases, these have a rather high interest in EGF. Even though they are often involved in the implementation of EGF measures, they usually do not have a major influence on their design. Their level of influence also varies depending on the Member State.
- 7) **Research:** Researchers representing academia or think tanks could have an interest in the EGF and, if they do, their findings might have an influence. These would usually be individual researchers, however, so that it would not make sense to consult 'researchers' as a group.

Table 1. Stakeholder consultation strategy: overview

	Feedback on call for evidence	Targeted Consultations	Beneficiary Survey	Online Networking Seminar	Contact Persons Meeting
Stakeholders targeted	Q3 2024	Q3-Q4/2024	Q3-Q4/2024	October 2024	Q4 2024
Workers/Beneficiaries	x		x		
Workers' Organizations	x			x	
Citizens/General Public	x				
Industry/business	x				
NGOs	x				
Private sector bodies	x			x	
Public Authorities	x	x		x	x
Research	x	x			

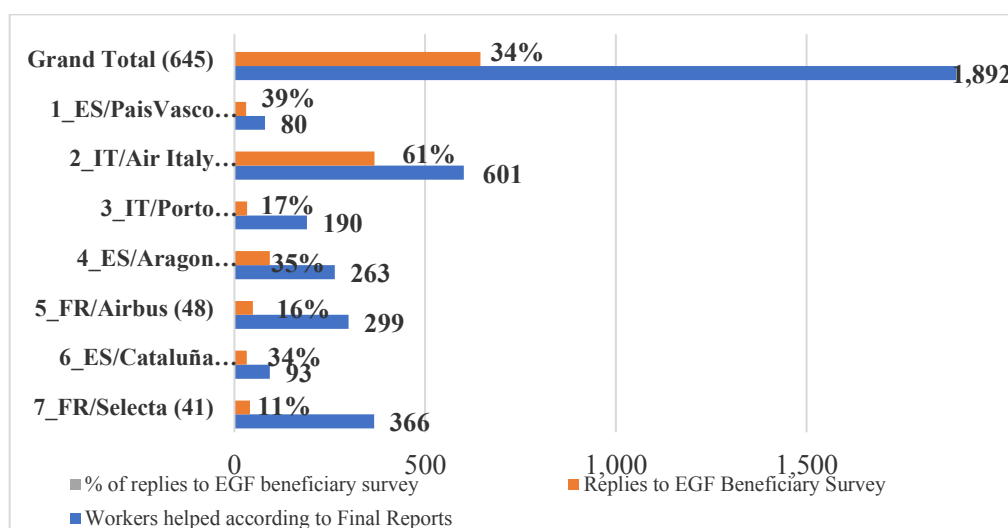
#### 4. Consultation methods and tools

##### 4.1. EGF beneficiary survey

Seven EGF beneficiary surveys were carried out via the EU Survey website in the second half of 2024 for seven EGF cases from 2021<sup>144</sup> which finished implementation.

In total 645 beneficiaries replied to the seven beneficiary surveys, representing about 34% of the workers helped. The average reply rate for individual EGF case ranged from 11% (EGF/2021/007 - France) to 61% (EGF/2021/002 - Italy)(See Figure 15 below).

Figure 15 Number of replies received to EGF beneficiary survey per case



<sup>144</sup> The seven EGF cases from EGF/2021/001 to EGF/2021/007 (inclusive) are listed in Table 6. The final report for EGF/2021/007 was not fully available at the time of drafting of this report..

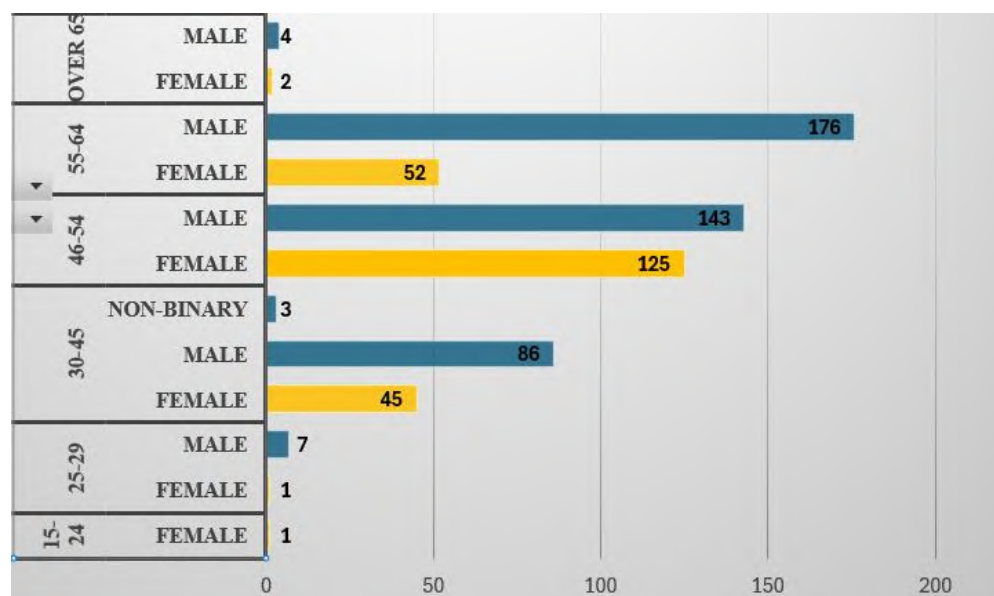


Source: European Commission, DG EMPL.

**Profile** of the 645 respondents before participating in EGF measures:

- **Gender:** 35% were women, 64,5% were men and 0.5% non-binary;
- **Age:** 1.4% was below 30 years of age, 62.33% were between 30 and 54 years of age and 36.28% were above 54 years of age;

Figure 16. EGF beneficiary who responded to the surveys per gender and age group



Source: European Commission, DG EMPL.

- **Education level:** 5% have primary education, 40% secondary education, 27% vocational education, 22% bachelor education or above and about 6% replied other;
- **Years of professional experience:** 3% have between 1-5 years, 8.7% have between 6 and 15 years, 20.3% have between 16 and 20 years and 36% have more than 21 years of professional experience;
- **Experienced long-term unemployment:** 50% of beneficiaries did, while 46% did not and 4% prefer not to say;
- **Feel disadvantaged on the labour market:** half of the beneficiaries feel disadvantaged because of age, being a parent, education level, location;
- **Employment situation before being displaced:** 89% had permanent contract, while 11% had temporary (fixed term) contracts. The majority of respondents (80%) were satisfied or very satisfied with their previous job, while 8% were dissatisfied.

### EGF measures taken up

The **EGF measures taken up** by the 645 beneficiaries were: individual job search assistance, case management, and general information services (519), Training and re-training (374), employment incentives/wage subsidy followed by (232), supported employment & rehabilitation (121), promotion of entrepreneurship (137), allowances (training, job-search, mobility, subsistence, carers of dependent persons) (231) and other (renewal of licence for pilot, employers' recruitment incentives) (67).

Beneficiaries considered the **most helpful EGF measures** to be training and re-training, counselling/coaching, allowances, wage subsidy, promotion of entrepreneurship and supported employment and rehabilitation.

About 174 beneficiaries could not participate in some EGF measures because they found another job, bad timing, it was far away, they were not interested, personal reasons, or other (retirement, measure no longer took place because of low number of participants, no trainer available).

**Time passed between the dismissal and the start of the measures** was up to 6 months for 37% of beneficiaries, between 6 and 12 months for 28% beneficiaries and longer than 12 months for about 35% of beneficiaries.

**Duration of EGF support:** 39% of beneficiaries followed measures which lasted up to five months, 32% between took up measures for 6 to 12 months, while 29% of beneficiaries got EGF support for more than 12 months.

**After participating in EGF measures**, the 645 beneficiaries were of the opinion<sup>145</sup> that the EGF support:

- was **tailored to their individual needs**: 62% of beneficiaries agree or strongly agree, while 26% disagreed with the statement.
- helped them **develop new skills/gain new qualifications**: 54% of beneficiaries agree or strongly agree, while 30% disagree/strongly disagree.
- helped them **gain more confidence in their abilities**: 48% of beneficiaries agree or strongly agree, while 30% disagree/strongly disagree.
- **encouraged the beneficiaries to overcome gender-stereotypes in job selection, and/or made them more aware of gender discrimination in general**: 48% of beneficiaries agree or strongly agree, while 30% disagree/strongly disagree.
- **digital skills**: 32% of beneficiaries agree or strongly agree that thanks to the EGF support they are **better able to use digital technologies (e.g. internet; computer, smartphone, other devices, software)**, while 39% disagree/strongly disagree. Several reasons explain these results: in some cases (e.g. two thirds of the beneficiaries who disagree worked in the air transport sector) where the level of digital skills was already good, no measures was offered, or in case both basic and ad hoc digital training measures were offered, those were not taken up<sup>146</sup>. Other reasons for not taking up digital skills were related to the age of the beneficiaries, or the fact that they were long-term unemployed and less inclined to participate in such measures.
- **environmental/green skills**: Thanks to the EGF support beneficiaries are better **able to save energy, produce less waste or find other ways to help the environment**: 25% of beneficiaries agree or strongly agree, while 41% disagree/strongly disagree.

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<sup>145</sup> The aggregate results presented refer only to the agreement and disagreement of the EGF beneficiaries with each statement. The remaining respondents chose either do not know or not applicable.

<sup>146</sup> In the case of EGF/2021/002 IT/Air Italy, the trainings on digital skills offered were: general training on digital skills (up to 90 hours), middle level general IT training, IT security and web.

- helped to **build a network of contacts**: 35% of beneficiaries agree or strongly agree, while 41% disagree/strongly disagree.
- feel **better qualified for work**: 46% of beneficiaries agree or strongly agree, while 41% disagree/strongly disagree.
- 178 beneficiaries **completed education or training with support of the EGF** such as: re-training, re-skilling, professional re-orientation<sup>(147)</sup>, language courses, vocational training, training to prepare for recognition of skills through work experience,
- beneficiaries chose to **professionally re-train mostly within the same sector** (132 beneficiaries). The other beneficiaries (113) chose different sectors than the one they previously worked in, retraining as receptionist, HR assistant, accountant, teacher, translator, coaching, interior design, renewable energy.

### **Employment situation after receiving EGF support:**

Of the 645 beneficiaries, **245 beneficiaries found a job, 55 started a new business (self-employed)**, nine were still in education/training, 22 retired, and 90 were inactive. The rest of 266 were still unemployed, of which more than 60% have been unemployed for more than one year.

### ***Details of the 245 new jobs started:***

- Type of **new job found**: 217 beneficiaries found a **full-time** job, while for 28 it was **part-time**. 152 have permanent contract, while 93 have temporary contracts.
- **Profession**: About 132 beneficiaries who found new jobs have the same profession as before receiving EGF support, while 113 have different professions (administrative employee, receptionist, project manager, mechanic, plumber, driver, technician, etc).
- **Location of new job**: 197 beneficiaries got jobs in the same region as the one held before receiving EGF support, 39 in a different region, while 12 got a job in a different country (the most of them had been displaced in the air transport sector).
- About 59 people were **motivated by the support received to find a job outside the country or region** (the most of them had been displaced in the air transport and automotive sectors), while 186 were not.
- **More responsibilities in the current job** than in the previous one: 95 beneficiaries confirmed they have more responsibilities in the current job, while 128 don't and 22 prefer not to say.
- Generally, in the new jobs the same (95 beneficiaries) or less **hours** (90 beneficiaries) of paid or unpaid **overtime** are normally worked the new job. Only 60 beneficiaries are working more hours than in their previous jobs.
- **Salary level** compared to your previous job: 70 beneficiaries declared having higher salary than before, 33 the same level of salary and 101 lower than before.

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<sup>147</sup> Examples given by beneficiaries: IT course, air carrier technical instructor, entrepreneurship, hotel receptionist, industrial technician, Courses (forklift operators, overhead cranes, etc., and radio frequency and picking), forklift and plastic injection operator.

- **Working conditions in your new job** compared to the job you held before receiving EGF assistance were better for 72 (29%) beneficiaries and the same for 64 (26%), while 59 (24%) declared to be worse.
- The **EGF measures helped beneficiaries find a new job**: 104 (42%) agreed, while 113 (46%) did not.
- The **technical and digital skills you acquired** during the support received were **helpful in the new job**: 39 (16%) beneficiaries considered they helped very much, for 61 (25%) beneficiaries it helped a little, for 53(22%) it did not help all, while 92 (38%) beneficiaries did not receive such trainings.
- A limited number of beneficiaries acquired **environmental/green skills** during the support you received. 28% considered these skills **helped them a little or very much in the new job**, while 18% considered that these didn't help.

***Details of the 55 self-employed /new businesses started:***

Out of the 645 who replied to the beneficiary survey, 55 beneficiaries started their own business, of which 76% full-time and 24% part-time. Most businesses were opened in the same region (86%) where they previously worked and in the economic sectors of automobile, retail trade, restauration, coaching, personal development, construction, real estate, tourism, a private English language school, take-over of family business, etc.

80% of the 55 business have been opened for more than 12 months, while the remaining 20% for less than 12 months.

In terms of number of people each new business had employed:

- One employee - 44 (80%) of businesses created;
- 2 employees per business (7 businesses);
- 5 employees in the case of 2 companies: one part-time private English language school and one take-over of the family farm and wine business;
- 7 employees in the case of a start-up food business;
- 12 employees in the case of a construction firm.

**Level of earnings was generally (78%) lower** compared to previous job, however in **60% of the cases the working conditions are considered better** than before.

In **71%** of the new opened businesses, the beneficiaries consider that **EGF support received helped them become self-employed**.

**The technical and digital skills acquired** during the EGF support received **were helpful for about 42%** of the beneficiaries who started the new businesses. About 45% of beneficiaries who started a business did not receive such trainings because the majority had worked before in the air transport sector and already had a good level of digital skills. The environmental/green skills acquired were considered useful by 15% of the self-employed beneficiaries, while 73% of them did not receive such trainings.

***Details of the nine beneficiaries still in education/training:***

Of the nine beneficiaries, 3 were still following bachelor's degree, and other four were following trainings such as: welding courses, training in the field of private security, computer security. active directory administration.

About half of the beneficiaries who acquired digital environmental/green skills during the support received found it helpful in their education or training programme.

#### ***4.2. Member State-level written and online consultations and interviews***

The consultation activities carried out were: (i) one online seminar and one in-person meeting<sup>148</sup>; (ii) two written surveys for all Member States implementing EGF cases, one focused on the EGF at case level (September 2024) and the other one on the EGF at instrument level (November-December 2024); (iii) one written survey for the Member States who did not apply for EGF co-financing (November-December 2024), complemented by discussions and interviews during the Contact Persons meeting organized in person on 27 November 2024; and (iv) case studies covering six EGF cases<sup>149</sup>. Two interviews were carried out for three cases during the Contact Persons meeting.

These written surveys and interviews have targeted EGF managing authorities, delivery partners, social partners. The interviews and case studies were used as the main source of information to answer the evaluation questions and feed into case study reports.

##### ***Targeted surveys for Member States with EGF cases***

Two targeted written surveys were carried out with the seven Member States implementing EGF cases. One survey was focused on the EGF at case level (September 2024) and received 4 written replies and also the other one on the EGF at instrument level (November-December 2024). Consultation of the implementing Member States has also been done during the online Networking Seminar.

Results from the consultations are presented in section 5 Results of consultation activities.

##### ***Targeted surveys for Member States that did not apply for EGF co - financing***

One written survey was carried out to understand why certain Member States did not apply for co-financing. It was aimed at EGF contact persons in countries that did not apply for EGF funding in the 2021-2027 period. 19 Member States replied to the written survey, while one Member State (SK) gave a feedback only during the in-person meeting organised on 27-28 November 2024 with the EGF Contact Persons and replied to one of the ten questions from the survey.

Further feedback was received from 13 Member States that did not apply for co-financing also during in-person discussions and interviews which took place during the EGF Contact Persons' meeting from 27-28 November 2024.

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<sup>148</sup> An online Networking seminar on 10 October 2024 with the stakeholders from the seven implementing Member States and eight non-implementing Member States (CZ, IE, LT, NL, PL, RO, SI, SE), and a Contact Persons meeting organized in person on 27 November 2024 in Düsseldorf, Germany, with the EGF Contact Persons from 16 Member States ((BE, CZ, DK, DE, EE, IE, ES, HR, LV, LT, HU, NL, PL, SK, FI and SE).

<sup>149</sup> From EGF/2021/001 ES/Pais Vasco until EGF/2021/006 ES/Cataluña automotive. A case study could not be completed for the seventh case (EGF/2021/007 FR/Selecta), because the data from the final report was incomplete at the moment of drafting this SWD.

Results of the consultation activities carried out during the Contact Persons meeting of 28 November 2024 are presented below, in section 5 Results of consultation activities.

### EU-level interviews

The purpose of the EU-level interviews was to add more in-depth qualitative evidence to data already gathered on the design and implementation of the EGF, and fill data gaps emerging from other consultation tools.

Two semi-structured EU interviews were conducted with European Commission staff.

## 5. Results of consultation activities

During the Networking Seminar which took place online on 10 October 2024, with seven implementing Member States was focused on the EGF at case level. Feedback received via Slido, tour de table and two breakout sessions showed the following:

### Effectiveness of the EGF

1. Factors encouraging displaced workers to **accept EGF support offered by their Member State**: tailor-made measures, support services in proximity to the target group, how measures are designed and implemented, and background of workers and their willingness to actively participate in EGF measures. Other reasons mentioned were: being well informed and programmes including economic incentives. Feedback was received via Slido from 12 participants.
2. Reasons influencing displaced workers to **refuse EGF support** include: finding a job sooner than expected, delays in the start of implementation of EGF measures, generous compensation from the dismissing company, personal reasons, robust labour markets offering employment possibilities and strong national and local support, mismatch between measures offered and beneficiaries' needs. Feedback was received via Slido from 12 participants.
3. The **achievement of the objectives of EGF cases** was **helped** by: the Member State's past EGF experience, institutional capacity, economic situation in the country or region and case-specific circumstances. Feedback was received from 9 participants via Slido.
4. The following factors were indicated to have **hindered or posted challenges to achieve the objectives of EGF cases**: problems and delays with the designing and implementation of EGF measures, difficulties in reaching and activating redundant workers and workers' low willingness for mobility and change. Feedback was received via Slido from 11 participants.
5. Ways in which the **EGF support was well-tailored to the actual needs of beneficiaries**, including the needs of unemployed women, young and older unemployed people or persons at an increased risk of poverty (tour de table: feedback from 6 MS):
  - The needs of the displaced workers are discovered at different moments and via different methods, such as:
    - o during orientation/counselling measures;
    - o in studies focusing on specific groups of workers, sectors etc.;

- during face-to-face meeting with employee representatives;
  - even before the workers are laid off, in meetings between the implementing body and the individual workers (in DE) to profile the workers to see what the competencies are, the qualifications and the needs of each person made redundant.
- In terms of timing, the measures are adapted to the needs of the beneficiaries either before designing the package of measures or during the implementation, after discovering the real needs of each individual.
  - The measures are adapted to the specific groups of displaced workers, including to the needs of unemployed women, young and older unemployed people or persons at an increased risk of poverty; for these groups, also an analysis of the situation in different sectors in the region plays an important role.
  - Previous experience with EGF helps in adapting the measures.
6. The following factors **prevent the early start of measures**: public tenders, EU approval process, timing deadlines, long processes for contracts, prefinancing needed, coordination with all actors involved, bureaucracy, common national treatment of EGF with other EU financial instruments such as ESF+, national legislation, etc. Feedback was received via Slido from 9 participants.
  7. The **early start of measures can be improved** by reducing the time of validation process, with a good planning and chronology of implementation, by accelerating the process, prefinancing of EGF measures to shorten approval time, improvement of national legislation. Feedback was received via Slido from 6 participants.
  8. The **training offered for digital and green skills is appropriate to the needs of the beneficiaries**. Feedback received during open discussions (breakout sessions) was:
    - All cases have tailor-made measures on digital and green skills depending on the needs of the beneficiaries.
    - Beneficiaries are profiled before the start of the measures, and measures are adapted accordingly.
    - There are financial incentives to improve digital skills, e.g. to obtain IT literacy. These were difficult to put in place but work very well now.
  9. **Lessons learned** from the implementation of 2021-2024 EGF cases. Feedback received during open discussions (breakout sessions) highlighted that:
    - Applications are now easier to fill in than before.
    - Previous experience with EGF helps a lot.
    - Flexibility in new intervention criteria, which allows support to be given to workers from small and medium-sized enterprises with different NACE Rev.2 division. This has a positive impact on the image of the project as well as on its implementation.
    - Different ways of informing the displaced workers about the participation in EGF co-funded measures are usually used, and in one case it was experimented to share such information also via posters at job fairs, besides regular methods.
    - Active participation of social partners (Unions and employers associations) is important in designing the measures, particularly in counselling and training.
    - Active involvement of the PES to identify the needs of the labour market, where the dismissals took place.
    - Reducing the size of the groups in training is helpful.
    - Economic incentives encourage participation in measures.

- Monitoring committees involving managing authorities and implementing bodies allow to swiftly introduce changes/corrections, if needed.

## Efficiency of the EGF

Stakeholders from implementing Member States were asked during the meetings, via Slido if the same results could have been achieved with fewer resources and/or in a shorter period of time. Several stakeholders consider that both the resources and the time were adequate, while one stakeholder mentioned a need for better adjusted budgets.

During the Contact Persons meeting which took place in-person on 28 November 2024, with 16 Member States (of which 3 had EGF ongoing cases) was focused on the **EGF at instrument level**, the **relevance** of some changes introduced by the 2021-2027 EGF Regulation and further improvements of the Fund. Feedback was received via Slido, tour de table and interviews.

A short consultation via SLIDO provided answers to 3 questions about the (a) broadened scope, (b) the changes in the EGF Regulation and (c) how can be the EGF be improved. Out of 25 EGF stakeholders present from 16 Member States (BE, CZ, DK, DE, EE, IE, ES, HR, LV, LT, HU, NL, PL, SK, FI and SE), 18/19 replied for the first two questions and 11 for the third one. The results showed that:

- (a) 100% of respondents agreed that the broadened scope of the EGF better reflects the economic realities and that the broadened scope makes the EGF more accessible.
- (b) 95% of respondents agreed that the changes introduced in the 2021-2027 period improve the EGF's efficiency (e.g. simplified application procedure).
- (c) 11 participants suggested as further improvements of the EGF: more simplification, shorter deadlines, capacity building, support at application stage, further decreasing the threshold of dismissals, guidance on Simplified Cost Options, etc.

A tour the table followed for the EGF contact persons from 11 Member States (CZ, EE, IE, HR, LV, LT, HU, NL, PL, SK and FI) who did not apply for EGF during 2021-2024. Each Member State was invited to present the reasons preventing them from applying for the EGF. The replies showed the main reasons for not applying have been:

- Support to redundant workers was provided with national funds, as these are available more quickly and provide more flexibility (FI & NL).
- Several countries (CZ, EE, HR, LV, LT, HU, PL and SK)<sup>150</sup> show a preference for using the ESF+ to provide support to workers laid off. SK is also using the Just Transition Fund to support displacements in the mining sector.

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<sup>150</sup> PL, RO, PT, CZ, HR, HU, SK, LT have high allocations under the cohesion policy for ESF+, JTF, ERDF, CF. See [2021-2027 EU allocation per Member State - Cohesion Policy \(ERDF - CF - ESF+ - JTF\) | Cohesion Open Data](#).



- National economy is doing well (HR, LV, and LT). The labour market is able to absorb the displacements.

# Survey for Member States implementing European Globalisation Adjustment Fund for Displaced Workers<sup>151</sup> (EGF) cases during 2021-2024

## EFFECTIVENESS at instrument level:

*The objectives of the EGF are to demonstrate solidarity towards workers made redundant and to ensure for each EGF case that the largest possible number of beneficiaries find sustainable employment as soon as possible.*

1. **Use of EGF support by Member States:**
  - a. Are the objectives of the EGF clear?
  - b. Are relevant stakeholders aware of the EGF in given MS?
  - c. What are the factors that:
    - i. encouraged Member States to apply for EGF?
    - ii. hindered Member States from applying for EGF?
  - d. Why were the EGF funds received from the Commission not entirely used in some cases?
2. To what extent does the **broadened scope of the EGF 2021-2027**<sup>152</sup> make the Fund fairer and more inclusive?
3. **Modified intervention criteria**<sup>153</sup>:
  - a. To what extent do the modified intervention criteria make the EGF more accessible?
  - b. To what extent are the modified intervention criteria appropriate and useful for the objectives of the Fund?
4. **Alignment of the EGF co-financing rate with the ESF+ (while maintaining 60% as the minimum threshold):**
  - a. To what extent is this alignment appropriate?

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<sup>151</sup> Regulation (EU) 2021/691 of the European Parliament and of the Council of 28 April 2021 on the European Globalisation Adjustment Fund for Displaced Workers (EGF) and repealing Regulation (EU) No 1309/2013 (OJ L 153, 3.5.2021, p. 48)

<sup>152</sup> For 2021-2027, the scope of the EGF was extended to cover job displacements resulting from any major restructuring events, in particular those caused by challenges related to globalisation, such as changes in world trade patterns, trade disputes, significant changes in the trade relations of the Union or the composition of the internal market and financial or economic crises, as well as the transition to a low-carbon economy, or as a consequence of digitisation or automation.

<sup>153</sup> See Article 4 Regulation (EU) 2021/691. The modified intervention criteria refer to a decreased threshold of displacements from 500 to 200 and different conditions for the reference period, as follows:

1. At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in an enterprise in a Member State;
2. At least 200 displaced workers (or self-employed persons activity ceasing) over a reference period of 6 months in enterprises, especially SMEs that belong to the same sectors in one or two adjoining regions;
3. At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in enterprises, especially SMEs that belong to the same of different sectors in the same region.

- b. Does it remove obstacles in applying and encourage Member States to apply for EGF support?
  - c. Has the alignment made the EGF fairer and does the EGF reach more potential beneficiaries?
5. Do the **modified EU or national procedures**<sup>154</sup> in place ensure a swift and resource saving decision-making process and thus a quick implementation?

**6. Information and communication activities**

- a. To what extent have the communication activities and meetings of the Commission proven useful and reached the relevant EGF stakeholders or Union citizens?
- b. To what extent have the information and communication activities of the Member States proven useful and reached the dismissed workers, the local population and other stakeholders, or Union citizens?
- c. Was there anything preventing your Member State from carrying out information and communication activities in order to promote the use of the EGF in general, or a specific EGF case in particular?

**EFFICIENCY at instrument level:**

7. Do the changes introduced in the 2021-2027 period improve efficiency?
- a. To what extent does the simplified application procedure (no need to demonstrate that the redundancies are linked to the effects of globalisation or an economic and financial crisis) help reduce the administrative burden when applying?
  - b. To what extent are reporting requirements imposed on Member States on the execution of the financial contribution from the EGF more demanding or less demanding than other similar programmes?

**COHERENCE at instrument level:**

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<sup>154</sup> For 2021-2027, the main procedural changes were:

- 1. Deadlines are calculated in working days instead of calendar days.
- 2. Shorter deadlines:
  - 1. for Commission: 50 working days instead of 12 weeks to complete its assessment of the application;
  - 2. for Member States: 15 working days instead of 6 weeks to reply to Commission request for additional information.
- 3. Start of the 24 month-period when Commission is notified of the adoption by the European Parliament and Council. This results in a full 24-month implementation period for all Member States. Before 2021, this was not the case for those whose national legislation prevented an early start of the measures before the decision on the mobilisation of the EGF. In 21-27, the flexibility to start implementation earlier at own risk is, and thus stretch implementation beyond 24 months, is retained.

8. How coherent is the EGF intervention with other European Union programmes and national instruments?
9. To what extent and how have Member States ensured the complementarity / prevented overlap of EGF support with other European Union instruments, such as the European Social Fund Plus, the Recovery and Resilience Facility or national instruments in Member States?

**RELEVANCE at instrument level:**

10. Does the broadened scope of the EGF, covering any type of large-scale restructuring events, no matter the cause, better reflect the economic realities and needs?  
Does it make the EGF more flexible and responsive?  
Does it make the EGF more accessible?

**EU ADDED VALUE**

*European added value is the value that an EU action adds through EU policy, regulation, legal instruments and spending, over and above that created by Member States acting alone.*

Is there an additional value of a Union intervention?

11. What is the EU added value of the EGF intervention?
12. To what extent does the support offered by the EGF replace or complement measures or allowances which the Member State would provide in the absence of EGF funding?

**13. What are your suggestions for the EGF's further improvement?**

## SURVEY

### for Member States who did not apply for the European Globalisation Adjustment Fund for Displaced Workers<sup>155</sup> (EGF) funding during 2021-2027

#### The role of the EU in active labour market measures

1. To what extent do you agree that the European Union should help displaced workers and self-employed persons in case of any major restructuring events, no matter the cause?
2. To what extent do you agree that the European Union should help displaced workers find another job as rapidly as possible through the provision of funding for active labour market measures (e.g. tailor-made training and retraining, job-search allowances, employers' recruitment incentives etc.)?

#### Relevance of the EGF

3. Is the **broadened scope**<sup>156</sup> of the EGF, covering any type of large-scale restructuring events, no matter the cause, appropriate? Does it make the EGF more accessible?
4. Are the **modified intervention criteria**<sup>157</sup> of the EGF for the 2021-2027 period appropriate?
5. Is the **alignment of the EGF co-financing rate with the ESF**<sup>158</sup> (while maintaining 60% as the minimum threshold) appropriate?

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<sup>155</sup> Regulation (EU) 2021/691 of the European Parliament and of the Council of 28 April 2021 on the European Globalisation Adjustment Fund for Displaced Workers (EGF) and repealing Regulation (EU) No 1309/2013 (OJ L 153, 3.5.2021, p. 48)

<sup>156</sup> For 2021-2027, the scope of the EGF was extended to cover job displacements resulting from any major restructuring events, in particular those caused by challenges related to globalisation, such as changes in world trade patterns, trade disputes, significant changes in the trade relations of the Union or the composition of the internal market and financial or economic crises, as well as the transition to a low-carbon economy, or as a consequence of digitisation or automation.

<sup>157</sup> See Article 4 Regulation (EU) 2021/691. The modified intervention criteria refer to a decreased threshold of displacements from 500 to 200 and different conditions for the reference period, as follows:

4. At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in an enterprise in a Member State;
5. At least 200 displaced workers (or self-employed persons activity ceasing) over a reference period of 6 months in enterprises, especially SMEs that belong to the same sectors in one or two adjoining regions;
6. At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in enterprises, especially SMEs that belong to the same of different sectors in the same region.

<sup>158</sup> See Article 112 of Regulation (EU) 2021/1060 of the European Parliament and of the Council of 24 June 2021 laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, the Just Transition Fund and the European Maritime, Fisheries and Aquaculture Fund and financial rules for those and for the Asylum, Migration and Integration Fund, the Internal Security Fund and the Instrument for Financial Support for Border Management and Visa Policy

## **Awareness of the EGF**

6. To what extent are the relevant stakeholders<sup>159</sup> aware of the EGF in your country?

## **Barriers to apply for EGF – Member states that did not apply for funding**

7. What are the **barriers** that prevent your Member State from applying for EGF funding?

*Findings from the ex post evaluation of the EGF 2014-2020<sup>160</sup> listed as barriers can be found in the footnote<sup>161</sup>.*

- 8. What changes in the EGF Regulation would make the EGF more accessible for your Member State or would encourage to apply for EGF?**

**European added value** is the value that an EU action adds through EU policy, regulation, legal instruments and spending, over and above that created by Member States acting alone.

9. What is the EU added value of the EGF intervention?
10. If yes, to what extent does the support offered by the EGF replace or complement measures or allowances which the Member State would provide in the absence of EGF funding?

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<sup>159</sup> The relevant stakeholders are: persons who have previously received EGF-funded support, displaced workers, workers threatened by displacement, self-employed persons who ceased their activity, workers' organisations and trade unions, non-governmental organisations, organisations involved in providing training, coaching, advice, business/companies, citizens/the general public, public authorities at regional or local level.

<sup>160</sup> [Ex-post evaluation of the European Globalisation Adjustment Fund \(EGF\) 2014-2020](#)

<sup>161</sup> - There have not been any cases in my Member State that correspond to the EGF's intervention criteria;

- EGF funding does not cater to the needs of the beneficiaries in my Member State;
- The actions funded by the EGF (e.g. job search support, training, help with self-employment etc.) are not adapted to my Member State;
- EGF support overlaps with measures or activities funded at national level with other EU funds (such as ESF);
- EGF support overlaps with measures or activities funded by national instruments;
- The EGF is not as cost-effective a response to job losses as national measures;
- The thresholds (500 redundancies) for intervention are too high for my Member State;
- The application procedure is too lengthy;
- The application is too burdensome;
- The co-financing rate is not sufficiently high;
- The financial support is not provided sufficiently quickly to enable quick implementation of the support;
- Other reasons.

## **ANNEX VI. CASE PROFILE DATA BY MEMBER STATE AND BY SECTOR FOR 18 APPLICATIONS RECEIVED BETWEEN 3 MAY 2021 AND 31 DECEMBER 2024**

Under Article 20(3) of the EGF Regulation, evaluations must include the figures showing the number of applications and cover the performance of the EGF by country and by sector, to assess whether the EGF is reaching its targeted recipients. The tables in this annex provide an overview of the 2021–2024 EGF applications. There are 18 applications in total, of which the results are available for seven cases. Due to the small number of cases, profound analyses per Member State or per industrial sector were not possible.

The most important general data on cases covered by this evaluation are given below.

For completeness of the exercise and for information purposes, we present overview tables on cases, sorted by Member State and subsequently per sector. The final table in this annex presents workers targeted in EGF cases, including the breakdown by gender and age of targeted workers.

Table 2. General overview of 18 applications received between 3 May 2021 and 31 December 2024

Case ref.	Case Name	Member State	Sector (NACE)	Intervention criterion	Globalisation / Crisis	EGF amount requested (€)	EGF amount spent (€)	Workers targeted	Workers helped	Average EGF amount spent per worker
EGF/2021/001	Pais Vasco metal	ES	Metalworking industry	b	Crisis (COVID-19)	1214607	175087,7	300	80	2189
EGF/2021/002	Air Italy	IT	Air transport	a	Corporate crisis	3874640	1600801,9	611	601	2664
EGF/2021/003	Porto Canale	IT	Warehousing and support activities for transportation	4(3) (Labour market)	Trade	1493407	1021361,7	190	190	5376
EGF/2021/004	Aragon automotive	ES	Manufacture of motor vehicles, trailers and semi-trailers	b	Crisis (COVID-19)	1404863	710854,05	320	263	2703
EGF/2021/005	Airbus	FR	Manufacture of transport equipment	a	Crisis (COVID-19)	3745264	3745264	297	299	12526
EGF/2021/006	Cataluña automotive	ES	Manufacture of motor vehicles, trailers and semi-trailers	b	Trade	2795156	226422,15	450	93	2435
EGF/2021/007	Selecta	FR	(vending machines) Wholesale trade, except of motor vehicles and motorcycles	a	Crisis (COVID-19)	1977200	1661510,1	366	378	4396



Case ref.	Case Name	Memb er State	Sector (NACE)	Interventi on criterion	Globalisati on / Crisis	EGF amount requested (€)	EGF amou nt spent (€)	Worke rs targete d	Worke rs helped	Average EGF amount spent per worker
EGF/2021/008	Attica Electrical Equipment Manufacturing	EL	Electrical equipment manufacturing	b	Trade	1495830		206		
EGF/2022/001	Air France	FR	Air transport & Aircraft maintenance	a	Crisis (COVID-19)	17742607		1580		
EGF/2022/002	TNT Express Worldwide	BE	Warehousing and support activities for transportation	a	Takeover	1956397		559		
EGF/2022/003	Alu Ibérica	ES	Basic metals	a	Trade	1275000		303		
EGF/2023/001	Logistics Nivelles	BE	Warehousing and support activities for transportation & Land transport and transport via pipelines	a	Corporate crisis	2153358		603		
EGF/2023/002	Makro	BE	Retail trade	a	Corporate crisis	2828223		421		
EGF/2023/003	Vallourec Deutschland	DE	Basic metals	a	Trade	2984627		835		
EGF/2023/004	Danish Crown	DK	Food products	a	Corporate crisis	1882212		390		

EGF/2024/01	Match	BE	Retail trade	a	Corporate crisis	2661564	365
EGF/2024/02	Limburg machinery and paper	BE	Machinery and Equipment & Paper	c	Other	704135	632
EGF/2024/03	Van Hool	BE	Automotive (buses)	a	Corporate crisis	7999015	2397

*Source: EGF Database*

Table 3. Case profile data by Member State

Member State	Case ref.	Case Name	Sector (NACE)	Intervention criterion	Globalisation / Crisis	EGF amount requested (€)	EGF amount spent (€)	Workers targeted	Workers helped	Average EGF amount spent per worker
BE	EGF/2022/002	TNT Express Worldwide	Warehousing and support activities for transportation	a	Takeover	1956397		559		
BE	EGF/2023/001	Logistics Nivelles	Warehousing and support activities for transportation & Land transport and transport via pipelines	a	Corporate crisis	2153358		603		
BE	EGF/2023/002	Makro	Retail trade	a	Corporate crisis	2828223		421		
BE	EGF/2024/001	Match	Retail trade	a	Corporate crisis	2661564		365		
BE	EGF/2024/002	Limburg machinery and paper	Machinery and Equipment & Paper	c	Other	704135		632		
BE	EGF/2024/003	Van Hool	Automotive (buses)	a	Corporate crisis	7999015		2397		
DE	EGF/2023/003	Vallourec Deutschland	Basic metals	a	Trade	2984627		835		
DK	EGF/2023/004	Danish Crown	Food products	a	Corporate crisis	1882212		390		

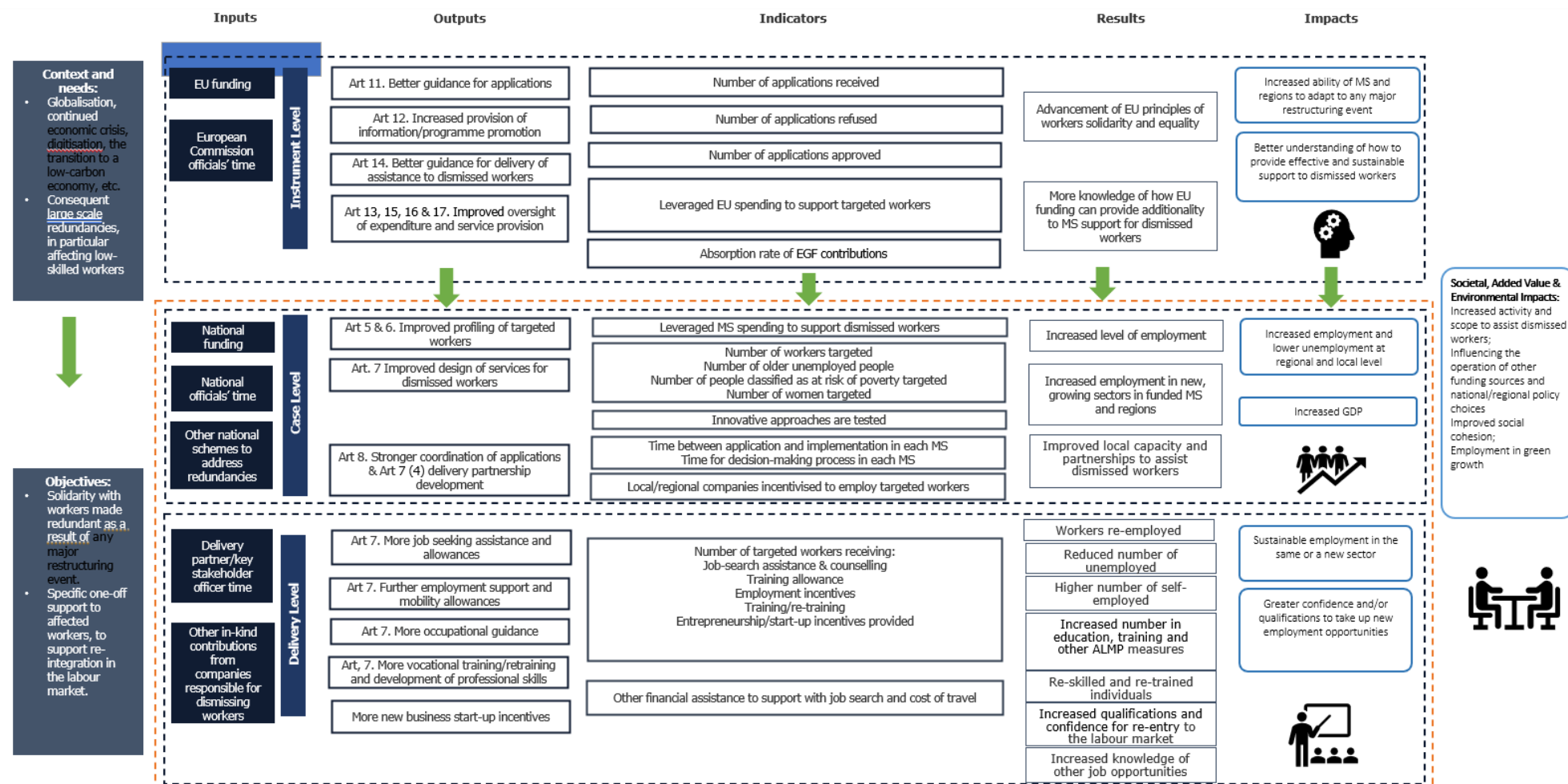
EL	EGF/2021/008	Attica Electrical Equipment Manufacturing	Electrical equipment manufacturing	b	Trade	1495830		206		
ES	EGF/2021/001	Pais Vasco metal	Metalworking industry	b	Crisis (COVID-19)	1214607	175087,7	300	80	2189
ES	EGF/2021/004	Aragon automotive	Manufacture of motor vehicles, trailers and semi-trailers	b	Crisis (COVID-19)	1404863	710854,05	320	263	2703
ES	EGF/2021/006	Cataluña automotive	Manufacture of motor vehicles, trailers and semi-trailers	b	Trade	2795156	226422,15	450	93	2435
ES	EGF/2022/003	Alu Ibérica	Basic metals	a	Trade	1275000		303		
FR	EGF/2021/005	Airbus	Manufacture of transport equipment	a	Crisis (COVID-19)	3745264	3745264	297	299	12526
FR	EGF/2021/007	Selecta	(vending machines) Wholesale trade, except of motor vehicles and motorcycles	a	Crisis (COVID-19)	1977200	1661510,1	366	378	4396
FR	EGF/2022/001	Air France	Air transport & Aircraft maintenance	a	Crisis (COVID-19)	17742607		1580		
IT	EGF/2021/002	Air Italy	Air transport	a	Corporate crisis	3874640	1600801,9	611	601	2664
IT	EGF/2021/003	Porto Canale	Warehousing and support activities for transportation	4(3) (Labour market)	Trade	1493407	1021361,7	190	190	5376

Table 4. Case profile data by sector

Sector (NACE)	Case ref.	Case Name	Member State	Intervention criterion	Globalisation / Crisis	EGF amount requested (€)	EGF amount spent (€)	Workers targeted	Workers helped	Average EGF amount spent per worker
Air transport	EGF/2021/002	Air Italy	IT	a	Corporate crisis	3874640	1600801,9	611	601	2664
Air transport & Aircraft maintenance	EGF/2022/001	Air France	FR	a	Crisis (COVID-19)	17742607		1580		
Automotive (buses)	EGF/2024/003	Van Hool	BE	a	Corporate crisis	7999015		2397		
Basic metals	EGF/2022/003	Alu Ibérica	ES	a	Trade	1275000		303		
Basic metals	EGF/2023/003	Vallourec Deutschland	DE	a	Trade	2984627		835		
Electrical equipment manufacturing	EGF/2021/008	Attica Electrical Equipment Manufacturing	EL	b	Trade	1495830		206		
Food products	EGF/2023/004	Danish Crown	DK	a	Corporate crisis	1882212		390		
Machinery and Equipment & Paper	EGF/2024/002	Limburg machinery and paper	BE	c	Other	704135		632		
Manufacture of motor vehicles, trailers and semi-trailers	EGF/2021/004	Aragon automotive	ES	b	Crisis (COVID-19)	1404863	710854,05	320	263	2703

Manufacture of motor vehicles, trailers and semi-trailers	EGF/2021/006	Cataluña automotive	ES	b	Trade	2795156	226422,15	450	93	2435
Manufacture of transport equipment	EGF/2021/005	Airbus	FR	a	Crisis (COVID-19)	3745264	3745264	297	299	12526
Metalworking industry	EGF/2021/001	Pais Vasco metal	ES	b	Crisis (COVID-19)	1214607	175087,7	300	80	2189
Retail trade	EGF/2023/002	Makro	BE	a	Corporate crisis	2828223		421		
Retail trade	EGF/2024/001	Match	BE	a	Corporate crisis	2661564		365		
Warehousing and support activities for transportation	EGF/2021/003	Porto Canale	IT	4(3) (Labour market)	Trade	1493407	1021361,7	190	190	5376
Warehousing and support activities for transportation	EGF/2022/002	TNT Express Worldwide	BE	a	Takeover	1956397		559		
Warehousing and support activities for transportation & Land transport and transport via pipelines	EGF/2023/001	Logistics Nivelles	BE	a	Corporate crisis	2153358		603		
Wholesale trade, except of motor vehicles and motorcycles (vending machines)	EGF/2021/007	Selecta	FR	a	Crisis (COVID-19)	1977200	1661510,1	366	378	4396

## ANNEX VII. EGF INTERVENTION LOGIC 2021-2027



Source: Updated intervention logic Ramboll Management Consulting, SEOR (2020), *Study supporting the ex post evaluation of the EGF 2014-2020*, Final Report, p. 93.

# ANNEX VIII. DESCRIPTION OF THE EGF AND THE EVOLUTION OF ITS RULES BETWEEN 2007 AND 2024

Applicability period	2007-2009	2009-2011	2012-2013	2014-2020	2018-2020	2021-2027
Co-funding rate (max.)	50% co-financing rate	65% co-financing rate until 31 December 2011	50% co-financing rate	60% co-financing rate	60% co-financing rate	co-financing rate aligned with ESF+ , while keeping 60% as a minimum
Scope	globalisation	•globalisation or •financial and economic crises  (crisis derogation).	globalisation  No crisis derogation.	•globalisation or •financial and economic crises  Broadened scope permanently reintroducing the crisis criterion, a higher co-funding rate as well as eligible actions for youth and the self-employed, and investment support in business start-ups and employee take overs (max. €15000).	Same provisions.	any unexpected major restructuring event, such as: • globalisation, trade disputes, significant changes in the trade relations of the Union or the composition of the internal market , • financial or economic crises, • the transition to a low-carbon economy, or • as a consequence of digitisation or automation • etc.
Minimum redundancies	1000+ redundancies over a period of : • 4 months in a Member State or • 9 months, particularly in small or medium-sized enterprises.  If conditions not entirely met, intervention remains admissible when redundancies have <b>serious impact on employment and the local economy.</b>	500+ redundancies over a period of : • 4 months in a Member State or • 9 months, particularly in small or medium-sized enterprises.  Same provision	Same provisions	500+ workers being made redundant or self-employed persons' activity ceasing, over a period of • 4 months, in an enterprise in a Member State or • 9 months, particularly in SMEs, all operating in the same economic sector.  Projects in small labour markets or exceptional circumstances may be considered if conditions not entirely met, intervention remains admissible when redundancies have <b>serious impact on employment and the local economy.</b>	same provision or • 9 months, particularly in SMEs, all operating in the same economic sector. <b>New possibility</b> to cover collective applications involving SMEs located in one region, operating in different economic sectors, when SMEs are the main or only type of business in that region.  Same provision	200+ displaced workers or self-employed persons' activity ceasing, over a period of • 4 months, in an enterprise in a Member State or • 6 months, particularly in SMEs, all operating in the same economic sector in <b>one or more contiguous regions</b> , or • 4 months, particularly in SMEs, all operating in the <b>same or different economic sectors</b> and located in the same region.  Same provision
Funding period	12-month period	24-month period	24-month period	24-month period	24-month period	24-month period from the date when Commission is notified of the adoption by the European Parliament and Council

Source: DG EMPL, based on Commission staff working document on the ex post evaluation of the EGF 2014–2020, SWD(2021)381/13.12.2021, p.109



The EGF is one of the Union's flexibility and special instruments and it was initially established for the 2007-2013 programming period<sup>162</sup>. Its aim was demonstrating the Union's solidarity by helping workers who lost their job as a consequence of major structural changes in world trade patterns due to globalisation leading to a serious disruption of the local, regional or national economy.

The EGF was set up to enable the EU to react to such unforeseen large-scale restructuring events. The restructuring challenges presented above are the responsibility of the national public employment services (PES). However, when unexpected large-scale restructuring events occur, with a significant impact on the regional labour market, the PES might have difficulties offering targeted measures with clear support strategies to a large number of redundancies only through national programmes.

At the request of a Member State, the EGF can co-finance active labour market measures aimed at bringing the dismissed workers back into stable employment<sup>163</sup>. The EGF intervention supplements national labour market measures for redundant workers. It also creates European added value by increasing the number, variety and intensity of services offered to redundant workers, and for a longer time than would be possible without EGF funding<sup>164</sup>.

In 2009<sup>165</sup>, following the global economic and financial crisis, the crisis eligibility criterion was introduced. For the 2014–2020<sup>166</sup> programming period, the EGF covered redundancies caused not only by globalisation and the continuation of the global financial and economic crisis, but also by any new global financial and economic crisis. Due to the high youth unemployment rates in many parts of the EU, Member States were allowed to include, under certain circumstances, the same number of young people 'not in education, employment, or training' (NEETs) as workers made redundant in EGF applications<sup>167</sup>. In 2020, the European Commission declared the COVID-pandemic an economic crisis<sup>168</sup> and

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<sup>162</sup> Regulation (EC) No 1927/2006 of the European Parliament and of the Council of 20 December 2006 on establishing the European Globalisation Adjustment Fund, OJ L 406, 30.12.2006, p. 1.

<sup>163</sup> See Commission SWD SEC(2006)274 *European Globalisation adjustment Fund (EGF) – Impact Assessment*, p. 18, which bases its analyses on the OECD's *Trade and Structural Adjustment: Recommendations for Good Practice (2005)*. The Commission later designed its own framework to tackle the challenges of restructuring, the EU Quality Framework for anticipation of change and restructuring (QFR), see [Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, COM\(2013\)882 final](#).

<sup>164</sup> See Commission SWD (2021)381 *on the ex post evaluation of the European Globalisation Adjustment Fund (EGF) 2014-2020*, [eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021SC0381&qid=1739185614557](#)

<sup>165</sup> For details see Regulation (EC) No 546/2009 of the European Parliament and of the Council of 18 June 2009 amending Regulation (EC) No 1927/2006 on establishing the European Globalisation Adjustment Fund, OJ L 167, 29.6.2009, p. 26, and Annex VI to this SWD.

<sup>166</sup> Regulation (EU) No 1309/2013.

<sup>167</sup> The use of the derogation under Article 6(2) was initially permitted until 31 December 2017, provided that at least some of the redundancies within the meaning of Article 3 occurred in NUTS 2 level regions eligible under the YEI. The support could be rendered to NEETs under the age of 25 in NUTS 2-level regions eligible under the YEI or, where Member States so decide, to NEETs under the age of 30. Later this possibility was extended until 31 December 2020, under different rules.

<sup>168</sup> See communication *The EU budget powering the recovery plan for Europe*, 27.05.2020.

set out a recovery plan for the economy, which included the EGF as an emergency tool to assist people who lost their jobs due to a global financial and economic crisis.

For the **2021-2027 period**, the EGF Regulation (EU) 2021/691 introduced **significant changes**<sup>169</sup>, adapted to the changing realities of the economy:

- **new name:** becomes the European Globalisation Adjustment Fund **for Displaced Workers**, while retaining its acronym “EGF”. This change emphasizes the core objective of the EGF, which is to express Union solidarity towards workers who have lost their jobs by helping them to adapt to structural change.
- **larger scope of eligibility** of an application to any unexpected major restructuring event, not only those caused by challenges related to globalisation, such as changes in world trade patterns, trade disputes, significant changes in the trade relations of the Union or the composition of the internal market and financial or economic crises, but also the transition to a low-carbon economy, or as a consequence of digitisation or automation, etc;
- **decreased threshold of dismissals** from 500 to **200**;
- **simplified and faster application process**, the requirement to demonstrate the cause of the displacements was removed; the focus has shifted on the significant impact, defined by the threshold of 200 displaced workers, instead of the cause of the displacements;
- **faster mobilisation procedure** and **shorter deadlines** both for the Commission and the Member States<sup>170</sup>. Deadlines are calculated in working days instead of calendar days;
- aligned **co-financing rate** with European Social Fund Plus (ESF+) (while keeping 60% as a minimum);
- the **dissemination of skills** required in the **digital age** and in a **resource-efficient economy** to be considered a horizontal element of any coordinated package of personalised services offered;
- **increased support for self-employment**, up to **EUR 22 000** per displaced worker, (up from EUR 15 000 during 2014-2020), for starting an own business or for employee take-overs;
- application to include information about good practices implemented by the Member State, in line with recommendations set out in the **EU Quality Framework for anticipation of change and restructuring**<sup>171</sup>;
- specific common **indicators** and **data collection focused on the essential** to monitor implementation and measure impact, also introducing **for the first time a beneficiary survey for each EGF case**, for evaluation purposes;

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<sup>169</sup> The changes were introduced largely based on the [Impact assessment accompanying the Proposal for a Regulation on the EGF 2021-2027](#), the [EGF ex post evaluation of the EGF 2014-2020](#) and previous EGF evaluations and reports on the EGF, such as [EGF ex-post evaluation 2007-2013](#), the [European Court of Auditors’ special report No 7 \(2013\) on the EGF](#), the [European Parliament’s European Implementation Assessment of the EGF 2007-2014](#).

<sup>170</sup> For Commission: 50 working days instead of 12 weeks to complete its assessment of the application. For Member States: 15 working days instead of 6 weeks to reply to Commission request for additional information.

<sup>171</sup> COM(2013) 882 Final.

- The start of the 24-months **implementation period** is postponed to the date of the entry into force of the Financing Decision (i.e. when Commission is notified of the adoption by the European Parliament and Council), resulting in a full 24-month implementation period for all Member States. In the past, some Member States began implementing the measures only after notification of the adoption, resulting in shorter implementation time, as the 24-month implementation period began on the day the application was submitted.
- longer time for Commission to process payments to Member States: 15 working days, instead of 15 calendar days;
- NEETs no longer supported by the EGF.

Member States' applications must comply with one of the intervention criteria (i.e. conditions for EGF support) set out in Article 4 of Regulation (EU) No 2021/691:

- At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in an enterprise in a Member State;
- At least 200 displaced workers (or self-employed persons activity ceasing) over a reference period of 6 months in enterprises, especially SMEs that belong to the same economic sector defined at NACE Revision 2 division level and are located in one or two adjoining regions defined at NUTS 2 level;
- At least 200 displaced workers (or self-employed persons' activity ceasing) over a reference period of 4 months in enterprises, especially SMEs that belong to the same of different economic sectors defined at NACE Revision 2 division level in the same region defined at NUTS 2 level.
- In small labour markets or in exceptional circumstances, where duly substantiated by the applicant Member State, an application for a contribution from the EGF may be considered to be admissible even if the criteria laid down in paragraph 2 of Article 4 are not entirely met, provided that the redundancies have a serious impact on employment and the local, regional or national economy. In such cases, the applicant Member State shall specify which of the intervention criteria set out in paragraph 2 are not entirely met.

Outside of the reference period of 4 or 6 months, more displaced workers and self-employed persons whose activity has ceased, can be included as eligible beneficiaries, provided the displacement happens six months before the start of the reference period or between the end of the reference period and the last day before the date of the completion of the assessment by the Commission. Such persons will be considered to be eligible beneficiaries if there is a clear causal link with the event which triggered the redundancies during the reference period.

The EGF cannot be mobilised where public-sector employees are dismissed as a result of budgetary cuts by a Member State.

Similar to the 2014-2020 period, the EGF assistance continues to take the form of a coordinated package of personalised services, comprising **active labour market policy measures**, ranging from personalised guidance and training courses to assistance in setting up a business. The EGF co-finances these measures, implemented by EU Member States, with the aim of helping the largest possible number of beneficiaries find decent and sustainable new jobs as soon as possible within 6 months after the end of EGF assistance. It enables beneficiaries to update their knowledge and skills, their employability, self-esteem or benefit from other suitable support, such as mobility allowances, childcare allowance.

Assistance from the Fund is offered reactively, after the redundancies have occurred, in addition to the efforts of the Member State at national, regional and local level, when sudden collective redundancy processes put the public employment services under extraordinary pressure. This support complements the more anticipatory assistance offered by ESF+.

Through the EGF, a more personalised approach is provided to the most vulnerable redundant workers, such as disadvantaged beneficiaries, including young and older unemployed people and those at risk of poverty, enabling them to update their knowledge and skills, or benefit from other suitable measures (e.g. mobility allowances).

The budget of an EGF application can also include, besides the co-financing of the coordinated package of personalised measures, the costs of the preparatory, management, information and publicity, control and reporting activities<sup>172</sup>.

The EGF does not cover passive social protection measures such as pensions. Nor does it cover passive allowances, i.e. allowances that are not conditional on the targeted beneficiaries' active participation in job-search or training activities. The co-financing cannot replace actions that are the responsibility of enterprises by virtue of national law or collective agreements (e.g. redundancy pay, legal requirements to draw up a social plan – depending on the national law of the Member State concerned).

The co-financing of allowances continues to be capped at 35% of the total package of personalised measures, in order to provide proportional assistance, and in line with the findings of an audit of the 2007–2013 EGF<sup>173</sup>. Such allowances can only be co-financed if they are conditional on the active participation in EGF measures.

### ***Functioning***

The functioning of the EGF 2021-2027 follows the same procedural steps as in the 2014-2020 period.

The EGF can be mobilised following a request ('EGF application') made by an EU Member State in need of assistance further to an unexpected major restructuring event. Applications are submitted by national EGF authorities to the European Commission. It is up to the Member State to decide on the working arrangements for the implementation of each case.

The Member State's application to the Commission must include information<sup>174</sup> such as:

- a brief description of the events that led to the displacement of the workers;
- a description of the enterprise(s) affected;
- a detailed categorisation of the displaced workers, by gender, age groups and education level;
- a description of the redundancies' expected impact on the local, regional or national economy and employment, including statistical and qualitative information; and
- a description of the package of personalised services to be financed, together with its planned budget.

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<sup>172</sup> Article 7(5) of Regulation (EU) 2021/691.

<sup>173</sup> [ECA \(2013\), p. 28](#)

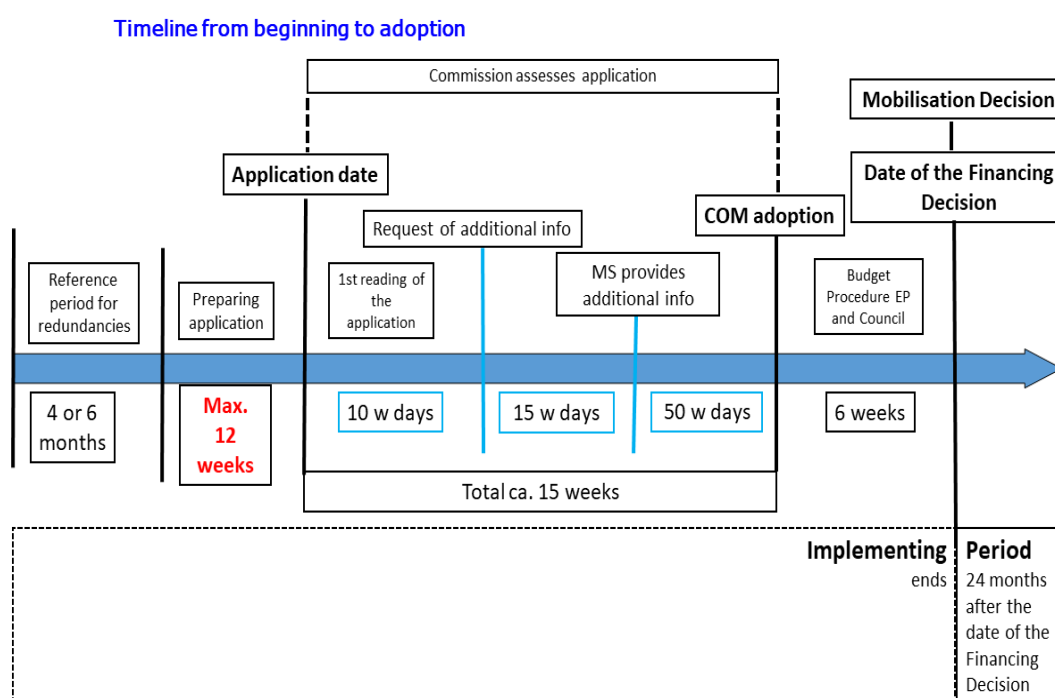
<sup>174</sup> See Article 8(7) of the Regulation (EU) 2021/691.

The applications are then assessed by the Commission. For those fulfilling the criteria, it proposes to the budgetary authority (the European Parliament and the Council) the mobilisation of the EGF. Once the budgetary authority has adopted the decision to mobilise the Fund, the Commission pays the contribution to the applicant Member State within 15 working days.

In principle, cases may be implemented for a maximum period of 24 months from the date of the entry into force of the Financing Decision (i.e. when Commission is notified of the adoption by the European Parliament and Council), instead of from the date the application is submitted (as it was in principle during 2014-2020). This results in a full 24-month implementation period for all Member States. Before 2021, this was not the case for those Member States whose national legislation prevented an early start of the measures before the decision on the mobilisation of the EGF.

Member States can choose to start helping beneficiaries much earlier, even right after the redundancies occur; these measures are also eligible for EGF co-financing. The flexibility of an implementation beyond 24 months existed in 2014-2020 and was kept for the EGF 2021-2027. However, early start of implementation is done at the own risk of the Member State, until the decision to mobilise the EGF is approved. Member States can also end implementation before the 24 months have elapsed.

Figure 17 The timeline of an EGF case from start to finish



Source: European Commission, Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL).

## Overview of the EGF applications received between 2007-2024

Under the first EGF Regulation (2007–2013), a total of 128 applications were received, out of which 15 were withdrawn and one was rejected by the Commission. The successful applications were submitted by 20 Member States and concerned 39 sectors. Assistance worth EUR 478 million was requested to help more than 105 000 workers.

The second EGF Regulation (2014–2020) saw 59 applications submitted by Member States. Of these, 53 applications were approved, 5 were later withdrawn and 1 was rejected by the Council. These 53 approved applications requested EUR 168.7 million to support a total of 56 807 targeted people, of which 3 369 were NEETs.

The third EGF Regulation (2021–2027) has so far had 18 applications submitted by Member States. Of these, 17 applications have been approved and one is still in the assessment by the European Parliament and the Council. The 18 applications requested EUR 60.2 million to support a total of 10 825 targeted people.

Trends can be observed from looking at the number of applications received from 2007 and 2024 (Figure 18 and Table 5 below). The crisis criterion was on a downward trend after 2014, when the EU was on a path of economic growth and decreasing unemployment. This lasted until 2020 when the COVID-19 crisis started, resulting in many jobs lost and a new wave of nine EGF applications under the crisis criterion submitted between 2020–2022. The trade-related globalisation criterion went through a similar trend, although it was used to a larger extent as the effects of globalisation are continuously affecting the labour force.

Figure 18 Number of applications received 2007–2024 (without withdrawn and rejected applications) (based on EGF Database)

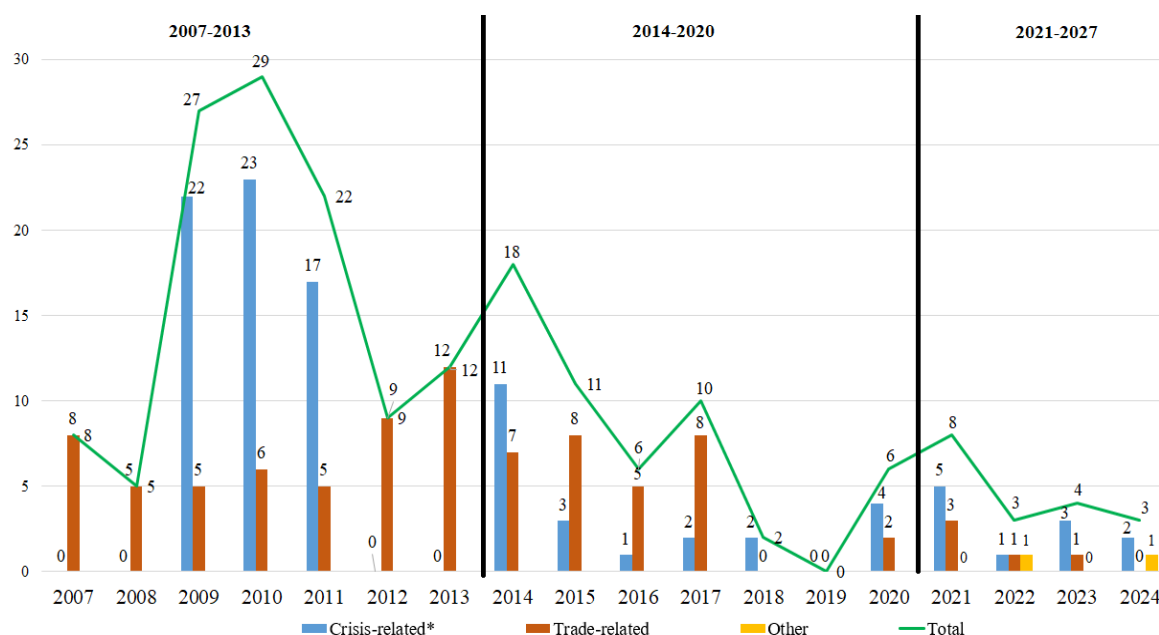


Table 5 Number of applications received 2007–2024 (without withdrawn and rejected applications)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
Crisis-related*	0	0	22	23	17	0	0	11	3	1	2	2	0	4	5	1	3	2	96
Trade-related	8	5	5	6	5	9	12	7	8	5	8	0	0	2	3	1	1	0	85
Other															0	1	0	1	2
Total	8	5	27	29	22	9	12	18	11	6	10	2	0	6	8	3	4	3	183
% of total	4%	3%	15%	16%	12%	5%	7%	10%	6%	3%	5%	1%	0%	3%	4%	2%	2%	2%	100%

Source: European Commission, EGF Database



Table 6. EGF applications received, amount requested and targeted beneficiaries by Member State, 2007–2024 (without withdrawn and rejected applications)

Member States <sup>175</sup> which have applied for EGF funding	Number of applications	EGF contribution (EUR)	Number of targeted beneficiaries	Average amount requested per beneficiary (EUR)
<b>Belgium</b>	20	61 243 589	23 592	2 596
<b>Czechia</b>	1	323 820	460	704
<b>Denmark</b>	11	65 562 994	6 624	9 898
<b>Germany</b>	12	59 119 012	16 474	3 589
<b>Estonia</b>	2	5 605 838	5 860	957
<b>Ireland</b>	10	67 720 204	11 209	6 042
<b>Greece</b>	10	44 763 580	8 280	5 406
<b>Spain</b>	28	58 246 162	17 108	3 405
<b>France</b>	12	123 120 413	21 687	5 677
<b>Italy</b>	16	69 253 228	15 197	4 557
<b>Lithuania</b>	5	2 861 619	3 013	950
<b>Malta</b>	1	681 207	675	1 009
<b>Netherlands</b>	19	35 186 039	10 359	3 397
<b>Austria</b>	6	27 998 090	1 952	14 343
<b>Poland</b>	5	2 575 712	1 806	1 426
<b>Portugal</b>	5	8 632 111	4 367	1 977
<b>Romania</b>	2	6 513 830	2 416	2 696
<b>Slovenia</b>	1	2 247 940	2 554	880
<b>Finland</b>	11	38 377 138	13 161	2 916
<b>Sweden</b>	6	27 502 116	5 868	4 687
<b>Total</b>	<b>183</b>	<b>707 534 642</b>	<b>172 662</b>	<b>4 098</b>

Source: European Commission, EGF Database

<sup>175</sup> Member States are listed based on the EU protocol order according to the Roman alphabetical order of their geographical names in the original language(s).