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COVER NOTE

From: Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director

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Subject: COMMISSION STAFF WORKING DOCUMENT EXECUTIVE SUMMARY OF THE EVALUATION Ex post Evaluation of the 2014-2020 European Social Fund (ESF) and Youth Employment Initiative (YEI)

Delegations will find attached document SWD(2026) 61 final.

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COMMISSION STAFF WORKING DOCUMENT
EXECUTIVE SUMMARY OF THE EVALUATION

**Ex post Evaluation of the 2014-2020 European Social Fund (ESF) and Youth
Employment Initiative (YEI)**

{SWD(2026) 60 final}

BACKGROUND AND CONTEXT OF THE EVALUATION

This executive summary presents the main findings from the ex-post evaluation of the 2014-2020 European Social Fund (ESF) and Youth Employment Initiative (YEI), which were implemented until 2022. In line with the Better Regulation Guidelines, the evaluation looked at the Funds' effectiveness, efficiency, relevance, coherence, and EU added value. In addition, the visibility criterion was assessed. The evaluation aims to provide relevant lessons learned for the implementation of the European Social Fund Plus (ESF+) and to contribute to the design of future policies and programmes beyond 2027.

Over the 2014-20 programming period, the European Social Fund was the main EU funding instrument for labour market, education, and social inclusion policies. It had the objective of promoting employment, helping people access better and fairer job opportunities, supporting upskilling and reskilling, fostering social inclusion, and reinforcing the institutional capacities of public administrations, public services and stakeholders. In response to the persisting challenge of youth unemployment across the Union, the EU launched the Youth Employment Initiative in 2013, providing financial support to Member States to implement measures helping young people's integration in the labour market, with a focus on regions with youth unemployment rates over 25%. As part of its investment priorities, the ESF has supported the implementation of the YEI. The implementation of the funds¹ took place in 27 Member States and the United Kingdom, covering interventions of EUR 131 billion, of which EUR 93.5 billion coming from the EU. The intensity of the support per inhabitant was higher for countries receiving Cohesion Fund support than countries not receiving it, reflecting the ESF's mission to contribute to territorial cohesion.

This evaluation was launched in accordance with the Art. 57 of the Regulation (EU) No 1303/2013, and identifies main findings and lessons learnt at the level of each evaluation criterion (effectiveness, efficiency, coherence, relevance, EU added value and visibility).

KEY FINDINGS

During the 2014-2022 evaluation period, ESF and YEI proved to be effective tools in addressing employment, education and social inclusion challenges across the EU. Together, these funds supported a total of 64.6 million participations, reaching a significant part of the general population of the EU27 and the UK. The funds led to considerable results. Overall, they contributed to 22.3 million immediate positive changes captured by the monitoring framework using indicators related to employment, skills or job-searching among participants². From those, more than 7 million people supported were in employment or self-employment after leaving an ESF or YEI intervention, and over 1.5 million previously inactive participants started searching

¹ The Youth Employment Initiative was implemented in 19 Member States and the United Kingdom.

² These results are assessed in the short term immediately after completing the operation.

for a job. The effects have also been sustained over time, with 6.9 million participants employed 6 months after leaving. Over 10 million people obtained a qualification after participating in an ESF or YEI programme, and more than 3 million enrolled in further education and training. The funds also promoted social inclusion, reaching a broad spectrum of target groups, and promoted gender equality in areas such as access to employment, career progression, or reconciliation of work and family life.

Available evidence shows that ESF/YEI support increased the probability of being in employment among participants. A meta-analysis of 110 national counterfactual impact evaluations indicates that ESF/YEI support made a difference by increasing participants' chances of being in employment, on average, by nearly 6 percentage points (corresponding to +15% in relative terms) compared to similar non-participants. Importantly, these numbers should be read having in mind that they mostly refer to individuals who are difficult to employ. When it comes to macroeconomic impacts, such as changes to GDP, the amount of available evidence was limited but positive. In particular, a positive effect on employment levels and GDP was estimated. In terms of return from investment, for every euro invested through the ESF (including YEI and REACT-EU³), an estimated EUR 1.26 increase in GDP is expected by 2030.

At the policy level, the ESF made meaningful contributions across all three core policy areas (employment, education and training, and social inclusion), aligning well with the Europe 2020 Strategy and the European Semester, and advancing key principles of the European Pillar of Social Rights. In addition, some examples of changes at a more systemic level were observed, especially in the context of the implementation of the Youth Guarantee. These include, for instance, a positive influence on youth policies, raising awareness on the NEET (young people neither in employment, nor in education or training) issue, and provoking some changes in strategic approaches and services for young people.

As concerns efficiency, the evaluation finds that ESF and YEI operations were, on the whole, highly cost-effective. A cost-benefit analysis was conducted as part of the evaluation, leveraging monitoring data on output and result indicators as well as financial data to assess the cost-effectiveness of operations. The analysis shows that benefits of ESF and YEI operations outweighed costs across most types of interventions, except for public work schemes. Notably, the highest ratios of public and private returns to costs were recorded for interventions contrasting school drop-out (43), supporting self-employment (20.5), promoting active inclusion (16.5) and access to employment (16). In some cases, certain benefits could not be monetised due to the lack of data and were therefore considered only qualitatively⁴.

³ Recovery Assistance for Cohesion and the Territories of Europe

⁴ Compared to the macro-economic modelling carried out by JRC, the CBA led to higher impact results. These differences in results can be explained by the used methodologies (CBA: discounting net returns; macro-modelling: simulating system responses) as well as underlying assumptions and timeframes considered.

Significant progress was made in simplifying the ESF/YEI process during the programming period, with the use of Simplified Cost Options (SCO) being widely recognised as a key factor in reducing administrative burden and facilitating efficiency. Nevertheless, some beneficiary organisations faced challenges with SCOs and digitalisation due to limited knowledge. Lighter monitoring and reporting structures compared to the previous period, including simplified reporting and self-evaluation forms, were identified to facilitate efficiency. Monitoring and reporting systems at Member State level are found to function well, with the number and quality of evaluations having improved in this programming period. Nevertheless, administrative burden in ESF programmes was still indicated as a concern by Managing Authorities and beneficiaries. Some hindering factors include high staff turnover, complex processes and guidance, leading to limited administrative capacity and lack of specialised skills. Simplification could be enhanced through streamlining application processes, notably by avoiding redundant information, simplifying reporting monitoring and requirements (especially for small institutions) and streamlining auditing requirements. Some measures in these domains have already been incorporated in the 2021-2027 framework, such as a reduced list of policy objectives, a clearer intervention logic through indicators, lighter reporting requirements and single audit arrangements.

The European Social Fund and Youth Employment Initiative demonstrated a strong alignment with national and regional strategies, fostering a culture of collaboration and synergy. The evaluation also provides robust evidence of ESF/YEI being coherent with other EU funds, such as the European Regional Development Fund (ERDF), the Fund for European Aid to the Most Deprived (FEAD), and Erasmus+ in terms of complementary objectives, scope and target groups. Complementarity was also observed between ESF and the objectives of the Recovery and Resilience Facility (RRF), the latter providing supplementary financial resources. Minor substitution effects were identified between the ESF and RRF. Overall, some challenges remained due to complex institutional structures which hindered further coherence with other EU funding instruments. Finally, dedicated EU support through the ESF and YEI programme was strongly coherent with other EU policies. Member States used key EU-level policies as the main point of reference when designing interventions, especially the Europe 2020 Strategy, the European Pillar of Social Rights and the European Skills Agenda.

Evidence from the evaluation suggests that the ESF/YEI were largely relevant in addressing the needs of the target groups concerned, and that those target groups were appropriately defined. In particular, ESF/YEI were able to reach a considerable share of people from disadvantaged backgrounds, with increased numbers compared to the previous programming period (15% of participants had a migrant, foreign, or minority background, and 19% of participants belonged to ‘other disadvantaged’ groups). Nonetheless, stakeholders also considered that there could be scope for better reaching out to some target groups such as Roma, refugees and migrants, persons with disabilities and persons with intersecting vulnerabilities, including with tailored outreach strategies. The evaluation points to the importance of supporting particular groups by adopting a specific and targeted approach and placing a greater focus on promoting and

agreeing operations with specific objectives, to enhance effectiveness and support changes on a structural level.

In view of emerging needs, the additional funds and reprogramming options introduced via CRII, CRII+⁵, REACT-EU⁶ and CARE⁷ further reinforced the funds' relevance. These tools made a substantial contribution to the pandemic response, helped alleviate financial constraints in public services and prepared the ground for longer-term investments. The flexibility provided with these initiatives allowed supporting operations to address newly emerged needs. They also allowed formal amendments of the programmes to reflect new Member States' priorities and contributed to continued relevance of the Funds.

Stakeholder involvement in designing, implementing, and monitoring interventions, alongside systematic needs assessments, was crucial for enhancing the relevance of ESF and YEI-supported operations. Managing authorities gained from understanding target groups' needs based on past experiences. Additionally, Member States could improve relevance by utilising ex-ante impact assessments and needs assessments to tailor interventions to target groups' specific needs and vulnerabilities. A holistic approach could be beneficial to address the concrete needs of vulnerable groups. The evaluation highlights the importance of the partnership principle, capacity-building, and sharing experiences and practices for effective intervention design, implementation, and monitoring.

The evaluation has demonstrated significant EU value added by ESF and YEI, which enabled Member States to reach more individuals and entities than national funding alone. During the pandemic, they allowed increasing the volume of support and expanding the type of services. The funds increased the support for hard-to-reach groups compared to previous programming periods, allowing support to new areas of intervention lacking national funding. Their implementation supported innovation and transfer of ideas, enabling strengthened social partners and local institutions. ESF and YEI operations enabled Member States administrations and participating organisations to gain new competences, enhancing the efficiency of their processes. However, evidence on structural changes was limited. To foster sustainable investments, early assessments by national authorities would be beneficial for identifying critical objectives and scalable innovative approaches. In this sense, it is essential to mitigate the risk of EU funding substituting national funding by strengthening the alignment between EU and national investment priorities. Lastly, enhanced programming flexibility helped to better contribute to emerging objectives and challenges.

The ESF/YEI programmes have achieved good visibility among organisations and stakeholders directly involved in the projects, thanks to effective communication activities such as websites, events, and social media. However, less visibility is perceived among the general

⁵ Coronavirus Response Investment Initiative (CRII), Coronavirus Response Investment Initiative Plus (CRII+)

⁶ Recovery Assistance for Cohesion and the Territories of Europe

⁷ Cohesion's Action for Refugees in Europe

public. Stakeholders have identified visibility as a key area for improvement, and the evaluation found that there is a need to better disseminate good practices and results of ESF/YEI support to a wider audience. To improve visibility of the funds, the evaluation points to the importance of a multi-faceted approach, combining various communication channels and tailored tools to specific target groups.