

EVALUATION ROADMAP	
TITLE OF THE EVALUATION	Ex post evaluation of the European Globalisation Adjustment Fund (2014-2020)
LEAD DG – RESPONSIBLE UNIT	Directorate-General Employment, Social Affairs and Inclusion - Unit F2 EGF, Shared Management
INDICATIVE PLANNING (PLANNED START DATE AND COMPLETION DATE)	Q2 2019-Q4 2021
ADDITIONAL INFORMATION	https://ec.europa.eu/social/main.jsp?catId=326&langId=en
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A. Context, purpose and scope of the evaluation
(A.1) Context
<p>The European Globalization Adjustment Fund (EGF) was established in 2006 by Regulation (EC) No 1927/2006 with the aim of showing Union solidarity with, and providing support to, people losing their jobs as a result of major structural changes in world trade patterns due to globalisation. To respond to the global economic and financial crisis, the rules governing the EGF were amended in 2009 by Regulation (EC) No 546/2009 and, since January 2014, by Regulation (EU) No 1309/2013. The latter regulation applies until 31 December 2020.</p> <p>In November 2017, the European Parliament, the Council and the Commission jointly proclaimed the European Pillar of Social Rights, which, among its 20 principles and rights, puts forward a principle on active support to employment which relates also to facilitating transitions on the labour market. The EGF puts this principle into practice in the case of major restructuring.</p> <p>The aim of the EGF is to contribute to smart, inclusive and sustainable economic growth and to promote sustainable employment in the Union by supporting workers made redundant and self-employed persons whose activity has ceased as a result of major structural changes in world trade patterns due to globalisation, or as a result of the global financial and economic crisis.</p> <p>EGF assistance is provided to redundant workers in the form of active labour market measures, which are part of a coordinated package of personalised services. Applications must be submitted by Member States and approved for co-financing by the budgetary authority. An approved application becomes an EGF case.</p> <p>Article 20 of Regulation (EU) No 1309/2013 requires the Commission to carry out an ex-post evaluation of the EGF in order to measure its impact EGF and added value.</p> <p>This evaluation is following up previous evaluations of the EGF 2014-2020, i.e. the mid-term evaluation of the EGF 2014-2020, which covered 29 cases received in 2014 and 2015 from 10 Member States and takes into account the impact assessment accompanying the Proposal for a Regulation on the EGF post-2020.</p>
(A.2) Purpose and scope

The ex-post evaluation of the EGF will be conducted both at the level of individual cases and of the instrument as such. This ex-post evaluation will assess how and to what extent the Fund achieved its objectives. The findings of this evaluation will guide the implementation of the Fund and be taken into account for designing new programmes in the area of employment and social affairs.

Pursuant to the Regulation, the evaluation will examine the impact and EU added value of the EGF. In line with the Better Regulation Guidelines and in order to obtain a comprehensive assessment, other criteria will also be assessed, such as the effectiveness, efficiency, coherence and relevance of the results achieved. Wherever appropriate, the evaluation will examine the complementarity and coherence of EGF interventions with other programmes, such as the European Social Fund, the Youth Employment Guarantee and national measures.

All EGF cases received between 2015-2019 will be covered. The evaluation will cover all Member States, include figures showing the number of applications and cover the performance of the EGF by Member State and by sector.

The evaluation will also serve accountability purposes indirectly through contributing to future biennial reports¹.

The results of the evaluation will be sent to the European Parliament, the Council and others² and will be available online.

B. Better regulation

(B.1) Consultation of citizens and stakeholders

The aim of the consultation is to collect the views of interested stakeholders regarding the relevance, effectiveness, efficiency, coherence, impact and EU added value of the EGF supported actions.

The EGF's most important stakeholders are the beneficiaries of EGF measures (workers made redundant or, in certain cases, NEETs). Other major stakeholders include the managing authorities, implementing bodies, private sector bodies and professionals, public authorities, academia, NGOs, organisations representing the business world, and the general public.

The following consultation activities are envisaged:

- a 4-week online public consultation on this Roadmap;
- seminar with relevant EGF stakeholders in March 2020;
- a 12-week online public consultation starting in June 2020 (in 23 official EU languages, published on the [Have Your Say](#) webpage); and
- targeted consultations in the form of interviews and/or questionnaires with a sample group of EGF beneficiaries and other relevant stakeholders.

The following methods will be used to publicise the consultations:

- webpage for the public consultation;
- social media and other channels, to raise awareness and promote the public consultations;

¹ The biennial report is a quantitative and qualitative report on the activities of the EGF in the previous two years. The report focuses mainly on the results achieved by the EGF, including in particular information on applications submitted, decisions adopted, actions co-financed, their complementarity with actions co-financed by other Union instruments, particularly European Social Fund, the winding-up of financial contributions made.

² the Court of Auditors, the European Economic and Social Committee, the Committee of the Regions, and the social partners

- press releases for the launch of the consultation and the publication of the final report;
- a summary report with the results of the 12-week online public consultation will be published on the consultation website shortly after the end of the consultation period; and
- a summary report covering all consultation activities will be annexed to the final evaluation report (Commission Staff Working Document).

The views and the evidence provided through the consultation process will be taken into account in the evaluation.

(B.2) Data collection and methodology

The evaluation will be supported by a study to be carried out by an external contractor. The study and the Commission Staff Working Document will take into account the following existing evidence on EGF:

- monitoring data: the biennial reports including activities of the EGF 2014-2018, published in [2015](#), [2017](#) and 2019, Member States' reports on the implementation of the EGF, Member States' final reports on each implemented EGF case;
- previous evaluations of the EGF³;
- other related studies and reports on EGF and academic research on restructuring, globalisation, future of work, etc.;
- experience from implementing the EGF of EGF stakeholders.

Additional analysis will be carried out through a combination of methods, case studies, targeted consultations, etc., in order to collect qualitative and quantitative information and ensure the reliability of findings.

These sources will be complemented with the results of the consultations of all relevant interest groups, as mentioned in the section above.

³ The [impact assessment accompanying the Proposal for a Regulation on the EGF post 2020](#), the [mid-term evaluation of the EGF 2014-2020](#), the [EGF ex-post evaluation 2007-2013](#), the [EGF's mid-term evaluation for the period 2007-2013](#)