



# **ESF Ex-post Evaluation Synthesis 2007-2013**

Country Report – Spain  
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## **Glossary of key concepts**

<b>A2E</b>	Access and sustainable integration into employment – one of the Priorities of Article 3 'Scope of assistance' of the ESF Regulation No 1081/2006
<b>Action</b>	The second level in the OP architecture, usually the Priority Axis (see below) consists of several actions
<b>Adaptability</b>	A key policy area in the ESF, consisting of activities to increase the adaptation of workers and enterprises to the changing economic circumstances and labour market demands - one of the Priorities of Article 3 'Scope of assistance' of the ESF Regulation No 1081/2006
<b>Annex XXIII categories</b>	The socio-economic characteristics of ESF participants reported in the ESF monitoring systems, relating to the participant gender, labour market status (employed (of which self-employed), unemployed of which long-term unemployed), inactive of which in education and training), age (young people aged 15-24 and older people aged 55-64), disadvantaged status (migrants, minorities, disabled, other disadvantaged) and educational attainment status (by ISCED levels)
<b>Category of expenditure (CoE)</b>	Categorisation of the Structural Fund expenditure; cf. ANNEX IV of COUNCIL REGULATION (EC) No 1083/2006 of 11 July 2006. ESF expenditure relates to Categories 62 to 74.
<b>Certified expenditure</b>	Expenditure incurred in the implementation of the ESF activities which has been approved by the Managing Authority of the Operational Programme and the European Commission
<b>Cluster</b>	A group of actions or interventions with common objectives and activities
<b>Community added value (CAV)</b>	The extent to which the ESF activities provided effects additional to the national / regional activities
<b>Convergence objective</b>	Speeding up the convergence of the least-developed Member States and regions: NUTS level 2 regions in the EU Member States whose gross domestic product (GDP) per capita was less than 75% of the average GDP of the EU-25 for the same reference period
<b>Effectiveness</b>	The extent to which the set aims and objectives have been reached
<b>Efficiency</b>	The comparison between the achieved outputs and results and the costs incurred
<b>Gender sensitivity</b>	The extent to which the planning, design, implementation and monitoring reflects the gender issues
<b>ISCED</b>	International Standard Classification of Education, an international standard classification used to classify the education levels:  <ol style="list-style-type: none"><li>1 Primary education</li><li>2 Lower secondary education</li><li>3 Upper secondary education</li><li>4 Post-secondary non-tertiary education</li></ol>

	5 Short-cycle tertiary education 6 Bachelor or equivalent
<b>Intermediate Body (IB)</b>	The organisation charged by the Managing Authority to implement the ESF funds in the OP
<b>Intervention</b>	The third level in the OP architecture, usually the Actions in the OP consist of several interventions
<b>Human capital</b>	A key policy area in the ESF, consisting of activities to develop the skills and knowledge of human resources across the different stages of the education and training system cycle, this theme is subject to another thematic evaluation - one of the Priorities of Article 3 'Scope of assistance' of the ESF Regulation No 1081/2006
<b>Managing Authority (MA)</b>	The institution in each Member State responsible for the strategic direction and financial management of the OP
<b>Operational Programme (OP)</b>	The means through which the ESF support was implemented in the Member States, as agreed between the European Commission and the Member States. Each OP consists of several Priority Axes, which in turn consist of several actions, which in turn consist of several interventions
<b>Output</b>	The immediate reach of the ESF activity (e.g. number of participants reached, number of schools or enterprises supported)
<b>Participant</b>	The person who participated in the ESF funded activity.
<b>Priority Axis (PA)</b>	The first level in the OP architecture, usually the OP consists of several Priority Axes (concepts of priorities, areas and others are also used in the OPs), which in turn consist of several actions and each action of several interventions
<b>Promoting Partnerships (PP)</b>	Policy priority focused on partnerships, pacts and initiatives through networking of relevant stakeholders, such as the social partners and non-governmental organisations, at the transnational, national, regional and local levels in order to mobilise for reforms in the field of employment and labour market inclusiveness. PP is one of the Priorities of Article 3 "Scope of assistance" of the ESF Regulation No 1081/2006.
<b>Regional competitiveness and employment objective (RCE)</b>	Aimed at strengthening regions' competitiveness and attractiveness as well as employment by anticipating economic and social changes outside the least-developed regions: NUTS level 2 regions in the EU Member States whose GDP per capita was above 90% of the average GDP of the EU-25 for the same reference period
<b>Result</b>	The change achieved through the activity leading to long term achievements of ESF activities (e.g. number of qualifications acquired by participants, number of enterprises providing training)
<b>Sustainability</b>	The extent to which the achieved results last

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## **Acronyms**

A&E	Accessibility and Employment
A2E	Access to employment and sustainable integration into employment
AIR	Annual Implementation Report
ALMP	Active labour market policy
CAV	Community Added Value
CIE	Counterfactual Impact Evaluation
CoE	Category of expenditure
CF	Cohesion Fund
CSR	Country Specific Recommendation
EC	European Commission
EEN	Expert Evaluation Network
ESF	European Social Fund
ERDF	European Regional Development Fund
EU	European Union
HC	Human Capital
IB	Intermediate Body
LMP	Labour market policy
LTU	Long-term unemployed
MA	Managing Authority
MS	Member State
NEET	Not in education, employment or training
NGO	Non-governmental organisation
NSRF	National Strategic Reference Framework
OP	Operational Programme
PA	Priority Axis
PES	Public Employment Service
SFC	Structural Funds Common Database
SI	Social Inclusion

## Executive summary

### Headline figures and key findings (end 2014)

- Spain had a total ESF allocation of EUR 11,202 million in the 2007-2013 period (about EUR 7,981 million of which was EU funding).
- By the end of 2014, 78.8% of the budget was declared to the EC.
- By far the largest share of the ESF budget is allocated to Access to Employment (69.5%), followed by Human Capital (19.5% of total ESF budget)
- ESF activities are implemented through two national Operational Programmes that account for 60% of total funding, with the remaining 40% shared between 19 regional programmes.
- In total 13.8 million participations are registered, of which: 32% young people, 63% unemployed, 46% of people with low educational attainment, and 21% disadvantaged.
- Aggregation of results
  - People into employment: 3,160,266
  - People gaining qualification: 97,587
  - Other positive results: 1,746,220
  - Products: 43,681
  - Entities: 51,385
- Major findings:
  - Importance of programming to respond to new challenges and evolving EU guidelines and recommendations
  - Diverse mix of various restructuring measures necessary to be able to respond to newly arising labour market challenges; in Spain a combined approach of entrepreneurship with support for employment
  - ESF provided a major contribution to social policy in Spain, both in terms of volume (major contribution to active labour market policies) and in role effects (lead by example, introduce innovative activities in terms of social policy) of the ESF support.

## Background

The country synthesis report covers the programming period up until the end of 2014 and includes the analysis of expenditure, outputs and results in Spain across all policy themes. It builds on the Human Capital, Social Inclusion and Access to Employment *ex post* evaluations, Annual Implementation Reports and on other available ESF evaluations carried out in Spain.

### 1. Policy challenges addressed by the ESF

The Spanish labour market was immediately affected by the economic crisis and employment rates are still decreasing, although to a lesser extent than at the beginning of the economic crisis. Nevertheless, spending on labour market policy has increased in Spain since the start of the economic crisis.

The European Commission Country Specific Recommendations address such issues. Specifically, the recommendations have highlighted the need to increase the participation of young people and long-term unemployed in the labour market and to strengthen active labour market measures for migrants. More recently, the Country Specific Recommendations pointed out the need to link training more effectively to the needs of the labour market, to the strengthening of coordination between national and regional public employment services and to the modernisation of the public employment services. Furthermore, the CSRs highlighted the need for Spain to improve the employability of vulnerable groups and develop in parallel an effective

child and family support services in order to improve the situation of people at risk of poverty and/or social exclusion.

## **2. The scale of ESF investment**

In total, there are 22 ESF Operational Programmes, of which three are National OPs. The focus is on employment with an emphasis on the integration of the long-term and young unemployed into the labour market, and the development of their skills.

**Funding:** Spain displays a high implementation rate regarding resources used by the end of 2014 (78.8%), having about EUR 11,202 million total funding in the 2007-2013 period (EUR 7,981 million of which was ESF funding). The policy field 'Access to Employment' received most of the funding, 69%. The policy field 'Human Capital' had the highest implementation rate (82%).

**Participations:** Concerning outputs, there were approximately 13.9 million participations in the interventions funded by the Spanish ESF OPs in the 2007-2013 programming period<sup>1</sup>. The policy field 'Access to Employment' received the majority of the participants (53.4%). Of the total number of participants the majority were unemployed, had low qualifications (ISCED 1 and 2; or 3) and were mostly young (30% of the total number of participants were younger than 25 years-old). The participation of migrants is modest (12.6%) while the share of disabled people is low (3.5%).

## **3. The effectiveness of interventions / What works for whom?**

The OPs set results were mostly achieved, and 'Increasing Adaptability' was the policy field where most of the interventions have been underachieving, but the implementation of these interventions was still considered satisfactory. Most of the result indicators within the policy field 'Access to Employment' were overachieved and the majority of interventions of the policy field 'Human Capital' were achieved.

Concerning effectiveness, although the availability of evaluation findings on results is insufficient, the ESF interventions were demonstrated as effective in several policy fields, such as improvement in the employment situation, enhancement of human capital or reinforcement of social inclusion.

### **Aggregation of results**

- People into employment: 3,160,266
- People gaining qualification: 97,587
- Other positive results: 1,746,220
- Products: 43,681
- Entities: 51,385

## **4. The efficiency of interventions**

Due to the lack of available data, it is not possible to present an overall picture of efficiency of the interventions implemented. The cost per participation for ESF Access to Employment interventions is EUR 820 per participant, considerably higher than for Human Capital (EUR 470) but are considerably less costly than the costs per participant of national ALMP interventions. In 2007-2013 the costs per participant for national ALMP interventions (as recorded by Eurostat) were on average EUR 2,230. While the range and character of these interventions cannot be compared in detail, this provides some sort of for ESF interventions, suggesting a high level of efficiency. In addition, when assessing the interventions in the policy field Access to Employment in more detail, it is evaluated that generally these can be characterised by generally low costs in comparison with the achieved results, underlining their efficiency.

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<sup>1</sup> We are aware that in some cases participants can be counted double to definition issues in the 2007-2013 programming.

## 5. The sustainability

Sustainability was only measured in the National OP Adaptability and Employment, quantifying the number of participants who still are employed 180 days after completing the measure. Out of the 3.9 million participants of the second Priority of this OP, 2.3 million (58.7%) were still in employment 180 days after completing the measure. There is practically no gender gap in the results achieved. The intervention to provide allowances for Social Security payments and to promote employment presented sustainable results, as 65%-70% of people recruited through this programme are still employed at the time of the evaluation.

In addition to sustainability of results, there are also examples where the interventions themselves are sustainable and persist beyond the programme cycle of ESF 2007-2013. The best example of this is the approach to improve the Public Employment Service (PES), whose process model has been incorporated by the Regional Government of Catalonia. The new model was even presented at the national level as good practice in 2014, resulting in the national government considering whether to implement it at national level.<sup>2</sup>

## 6. The gender sensitivity of interventions

The issue of gender sensitivity and equal opportunities between men and women was one of the key challenges listed in the NSRF. Due to the crisis, a high number of gender mainstreaming interventions were no longer financed, hindering their contribution. Overall, the share of women among all participants during this programming period in Spain is 54.7%. The share of women varies across the policy fields, with 'Increasing adaptability' having the lowest share (47.1%) and 'Promoting partnerships' (although the number of participants in this policy field is very small) having the highest share of women (69.2%). The number of created businesses is distributed equally among men and women with about 30,800 each. However, the number of businesses that implemented measures to fight gender inequality in workplaces did not reach the final target set, as only 3,877 out of 5,183 planned (75%) participated. An evaluation on gender equality reported that 60% of the interviewed people of equality bodies report that the contribution of the ESF was of great importance, and that without the ESF funding it would not have been possible to implement the gender equality strategy in the respective region the same way.

## 7. Community added value of ESF investment (for each type, specify in which theme(s) the CAV has been predominant) present by order of importance.

The Community Added Value of each priority has been evaluated in four different dimensions: volume effects, scope effects, role effects and process effects. Regarding volume, evaluation reports claim that the economic and financial crisis that affected Spain resulted in a high percentage of planned interventions that were not implemented. While overall, the available budget was reduced by EUR 380 million as well, in most cases these investments were re-programmed to more directly address the effects of the crisis. No less than EUR 1.4 billion was reprogrammed from adaptability objectives into additional investments in the field of unemployment. Regarding scope effects, in some cases ESF resources broadened existing actions by supporting policy strategies that would not otherwise have received support, achieving a wider scope because of their nature. These long-term actions could guarantee sustainable internal changes in public entities and services, ensuring scope effects at the local and regional level, and in a few cases at national level, and supporting actions already planned and where implementation had begun in the previous years. As the national government is also considering implementing these strategies at national level, they are a good example of a role effect. Finally, ESF actions had a positive process effect, as they enabled the Spanish administrations and organisations involved in the programmes to implement interventions aimed at changing and

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<sup>2</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Horizontal Analysis

improving regional public services, alleviating the effects of the economic and financial crisis.

## 8. Socio-economic impact

Concerning the social and economic impact of ESF interventions, 739,704 people (47% men, 53% women) found employment and 112,888 businesses were created during this programming period. An aspect that gained relevance was the promotion of business in the third sector in the field of the social economy due to its contribution to generate social and economic impact, but also by the creation of employment for those vulnerable groups in or at risk of social and labour market exclusion. Moreover, thanks to the cross-cutting character of many ESF interventions, a high number of people sensitised in environmental issues was reached (786,789). There was improvement as well of professional competences and acquisition of professional qualifications (outside formal education sector) related to the environment field (206,433 people attended training courses on the environment field).

## 9. Overall assessment of all evaluation criteria

While the implementation of the ESF programme 2007-2013 in Spain has been severely challenged by the economic and financial crisis, it delivered an important contribution to social and economic development. It contributed to a significant share of the active labour market policies in place, which help overcome the most acute outcomes of the economic and financial crisis.

Despite the important added value to national policies in terms of volume, the possibilities to evaluate the effectiveness and efficiency of the interventions within the programme is limited due to the design of the ESF programming. In addition, the evaluations conducted across various priorities, OPs and individual interventions are often not fully adequate to evaluate the effectiveness and efficiency. Despite these limitations, this evaluation shows that overall many crucial result indicators have reached satisfactory levels of sustainable implementation.

## 10. Key lessons

Thanks to the analysis of the ESF interventions, it is possible to extract some lessons for the new programming period 2014-2020. The main lessons identified are:

- **Policy choices:** pay due attention to EU guidelines and recommendations in order to have a wider vision of the situation and challenges and to be able to make adequate and appropriate policy decisions and to face new situations;
- **Target groups:** pay due attention to a proper definition and identification of target groups, in order to achieve the predicted results and facilitate a multiplier effect;
- **Programming:** employ a diverse mix of various restructuring measures and actions to deal with new labour market situations;
- **Implementation:** establish a simple, clear and effective system able to rapidly react to new challenges in an adequate and appropriate way, as well as improve the process of coordination and organization among the implementing entities;
- **Monitoring:** develop a simple, robust and easy to follow monitoring system, which would provide access to information sources and data cross-checking making it compulsory in order to be able to analyse and compare the implemented interventions.

**Evaluation:** the introduction of a compulsory evaluation system accompanied by access to information sources and data cross-checking is fundamental. The evaluation system should be further strengthened against the detected weaknesses and impeding access to sources of information and crosschecking of data, essential for proper analysis.

Table 1. ESF Ex post evaluation, main figures by policy theme

	Human Capital	A2E	SI	AC	Partnerships	TA	Total
<b>Allocated in millions EUR (EU + national funding)</b>	2,175	7,755	-	1,082	32	116	11,161
<b>Of it EU (%)</b>							
Declared expenditure in million EUR (and % of allocation)	1,785 (82.1%)	6,070 (78.3%)	-	844 (78%)	19 (62.5%)	74 (63.2%)	8,793 (78.8%)
<b>Participations (thousands)</b>	2,826	7,401	870	2,764	0.4		13,861
Youth (16-24)%	73.2%	23.7%	14.1%	15.7%	67.9%		31.6%
Unemployed %	15.5%	94.7%	77.1%	20.6%	54.3%		62.7%
Inactive %	63.9%	4.4%	5.4%	11.4%	0.0%		17.2%
Disadvantaged %	8.3%	26.4%	71.3%	5.3%	82.4%		21.3%
Low skilled (ISCED 1-2)%	29.0%	59.1%	59.0%	26.0%	3.9%		46.4%
<b>Results (thousands)</b>							
People into employment	171,320	2,988,946					3,160,266
People gaining qualification	97,587						97,587
Other positive results	1,746,220						1,746,220
Products	43,681						43,681
Entities	45,198	6,187					51,385

## Introduction

This document is the country synthesis report for Spain under *Evaluation Task 2B: National level analysis* of the ESF 2007-2013 Ex post Evaluation Synthesis. The purpose of the present report is to summarise and analyse the most recent and robust evaluation evidence available and provide a succinct overview of the outputs, results and impacts of the ESF under the main ESF Priorities as defined in the ESF Regulation<sup>3</sup>. These are generally:

- increasing adaptability of workers, enterprises and entrepreneurs with a view to improving the anticipation and positive management of economic change
- enhancing access to employment and the sustainable inclusion in the labour market of job seekers and inactive people, preventing unemployment, in particular long-term and youth unemployment, encouraging active ageing and longer working lives, and increasing participation in the labour market
- reinforcing the social inclusion of disadvantaged people with a view to their sustainable integration in employment and combating all forms of discrimination in the labour market
- enhancing human capital
- promoting partnerships, pacts and initiatives through networking of relevant stakeholders, such as the social partners and non-governmental organisations, at the transnational, national, regional and local levels in order to mobilise for reforms in the field of employment and labour market inclusiveness

And, additionally, in Convergence regions:

- expanding and improving investment in human capital
- strengthening institutional capacity and the efficiency of public administrations and public services at national, regional and local level and, where relevant, of the social partners and non-governmental organisations, with a view to reforms, better regulation and good governance especially in the economic, employment, education, social, environmental and judicial fields

The ESF achievements under each Priority have been evaluated in the following sections: Extent to which resources were used, Effectiveness, Efficiency/cost-effectiveness, Socio-economic impact, CAV, Gender sensitivity and Sustainability.

For this country synthesis report, existing reports have been used emanating from EU level evaluations, in particular the recent thematic ex-post evaluations on Human Capital, Social Inclusion and Access to Employment and the reports of the ESF EEN expert evaluation network as well as national evaluation material and other relevant reports. This information has been updated by the AIRs 2014 in the case of this report.

Given the reliance of the country synthesis reports on existing material for the most part, there is more detailed information on some policy areas than others. This is the case for the chapters on 'Human Capital', 'Access to Employment' and 'Social Inclusion'. Given the financial volume, however, of the Priorities covered thoroughly by the thematic ex post evaluations, this difference seems acceptable. For example, 69% of the OPs resources are used in the Priority Axes concerning 'Access to Employment', 19% in the policy field 'Human Capital' and 10% in 'Adaptability'. 'Social Inclusion' is a horizontal priority and just 0.3% was allocated to the policy field 'Promoting Partnerships'. However, this difference in detail does not mean that no attention is paid to partnerships; many of the interventions in Access to Employment in fact seek to develop partnerships, often with local entities.

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<sup>3</sup> REGULATION (EC) No 1081/2006 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 5 July 2006 Article 3, Scope of assistance

## **1 Background and Context**

### **1.1 Challenges and role/position of ESF**

#### **1.1.1 Challenges faced by the country in the different policy fields at the time of programming and during the programming period**

At the initial planning stage of the programming period 2007-2013, the financial and economic crisis had not yet started and therefore, the corresponding Spanish macroeconomic data seemed to be still positive. From 2008, the financial and economic crisis started to affect Spain, and this is shown in the changes in GDP (+1.1% in 2008; -3.6% in 2009).

The unemployment rate increased rapidly from 2007 (8.3%) to 2013 (26.2%), especially for young people for whom it increased from 2007 (18.1%) to 2013 (55.5%). Unemployment rates among people with low skills (ISCED 0-2) have also increased since 2007. In these years, the employment situation of this group has worsened from 10.5% unemployment in 2007 to 35.5% in 2013. Unemployment among people born in a foreign country has also increased rapidly during the economic and social crisis.

The increase in long-term unemployment has been one of the main characteristics of the Spanish labour market in the last years. Although between 2005 and 2007 LTU rates were reduced, between 2009 and 2013 there was an increase of 8.7 percentage points reaching a LTU rate of 13.0% in 2013.

The share of young people not in education, employment or training (NEET) in Spain has grown in the period 2007-2013. The largest increase was reported between 2007 and 2009. From 2009 to 2013, the percentage of NEETs only increased in the case of women. In total, 18.1% of young people were not in education, employment or training in 2013, which is far above the EU-27 average (12.9%).

Concerning the share of population at risk of poverty and social exclusion, after some improvement between 2005 and 2007, from 2007 onwards the share has steadily increased. In 2013, it represented 26.1% of the Spanish population, exceeding the EU-27 average (23.7%).

#### **1.1.2 CSR addressed by the ESF**

The Country Specific Recommendations (CSR) of 2007 concentrate on the efforts to implement a newly developed training model (which integrates occupational and vocational training), to provide a better response to labour market needs; and ensure the effective implementation of education reforms, also at regional level, to reduce early school leaving. Within the 2008 and 2009 CSRs, it was recommended that Spain continues the promotion of the integration of immigrants into the labour market and to ensure the effective implementation of education reforms, also at regional level, to reduce early school leaving. The CSRs of 2011 were related to the training offer and its link to the needs of the labour market, to reduce labour market segmentation (as was mentioned in the CSRs 2009) and to improve employment opportunities for young people. Reducing early school leaving was again mentioned as a recommendation. The CSRs of 2012 were based on the need to support the Employment Strategy (promotion of social and labour integration and reincorporation) for older workers and lifelong learning, increasing training and labour orientation in the search for employment, as well as the strengthening of coordination between national and regional public employment services. The latter refers to the 'Access to Employment priority' of the OPs related to the improvement of employability and administrative efficiency. Furthermore, the CSRs highlighted the need for Spain to improve the employability of vulnerable groups, and develop in parallel effective child and family support services in order to improve the situation of people at risk of poverty and/or social exclusion.



The 2013 CSRs coincided with those of the earlier years. They related to the modernisation of the public employment services, the reinforcement of the effectiveness of re-skilling training programmes for older and low-skilled workers, and the implementation and supervision of the efficiency of measures for reducing youth unemployment (Youth Employment Strategy 2013-2016). Consequently, they are totally aligned with the priorities of the OPs related to 'Access to Employment'. A further recommendation related to Social Inclusion was to improve the effectiveness of social protection policies in Spain.

In 2014, the CSRs further stressed this recommendation and prompted Spain to simplify procedures for social assistance and improve inter-institutional coordination at national, regional and municipal levels. Additionally, Spain was urged to fully implement the 2013-2016 National Action Plan on Social Inclusion and assess its effectiveness.

In general, the Operational Programmes (OP) responded to the challenges specified in the CSRs. Those addressed by the OP are above all related to improving the labour market situation, such as: reduction of labour market segmentation, improvement of the employment opportunities for young people, improvement of working conditions, promotion of older workers' reincorporation to the job market, modernisation and reinforcement of public employment services and increase of the use of training actions, reinforcement of evaluation and monitoring system.<sup>4</sup>

### **1.1.3 ESF response to the crisis**

As the economic and financial unfolded, the ESF Operational Programmes of the Spanish Autonomous Communities had to face the deteriorating economic reality and its social and economic consequences (among others: reduction of quality jobs, increase of temporary employment contracts, increase of poverty and inequalities, and lack of labour opportunities for young people). The initial objectives of the ESF Operative Programmes were not met. Facing the urgent situation and to meet new needs, some objectives, like the improvement of quality in employment, were put aside in order to focus on the creation of new jobs (even if precarious), on the assistance to the most affected groups and on the reduction of gender based segregation.

Spanish regions had to make a significant effort in redefining and assessing the new labour market needs. The main priority became to establish 'remedial' actions targeting the most affected groups or territories, using the potential of the ESF to alleviate problems related to unemployment. The changes included simplifying criteria in order to receive ESF support, making a more rapid use of the available funds for reinforcing active employment policies and supporting the most disadvantaged groups or territories. A number of interventions were reprogrammed in response to the crisis, for example, reinforcing the efficacy of requalification programmes addressed to older workers with low qualifications, implementing actions addressed to disadvantaged groups (young people, long-term unemployed people, etc.), increasing the educational level of the population and reducing early school leaving.

The main objective of the reprogramming was to increase the financial expenditure projected for Priority Axis 2 'Promoting employability, social inclusion and equal opportunity between women and men', in particular the Category of Expenditure 66 'Implementing active and preventive measures on the labour market'. At the end of 2013, Spain dedicated 16.87% of its ESF expenditure planned for the financing period 2007-2013 to A2E actions, above all to interventions under the Category of Expenditure 66.<sup>5</sup> Moreover, among the reprogrammed interventions, it is relevant to mention the 'Youth Opportunity Initiative', which had the general aim of driving down youth unemployment in EU countries. More in detail, in 2012 the Commission

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<sup>4</sup> ESF Ex post evaluation Access to Employment – Horizontal analysis

<sup>5</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Country Report Spain

proposed for Youth Action teams to examine the possibility to use structural funds in a more intensive way in order to fight against youth unemployment and to promote job creation in eight Member States. In Spain, several ESF OPs were modified in 2012, particularly driven by the YEI (Youth employment initiative) and in the context of the deteriorating youth unemployment situation. ESF reallocation focused on support to the PES to develop active labour market policies, including for young people, redirecting overall EUR 135 million under the national OP Adaptabilidad y Empleo. Some regional OPs increased also support to actions targeted at young people, included a reinforced attention to early school leavers and vocational training. Finally, over EUR 286 million in EU funding was reallocated to actions related to youth in 2012<sup>6</sup>.

## 1.2 Support and Contribution to the Lisbon Strategy and Europe 2020 strategy and targets

At the beginning of the programming period 2007-2013, the improvement of employability and access to the labour market for vulnerable groups (women, young people, and disadvantaged groups) were challenges already pursued by Spain. The objectives related to the improvement of labour market access (in particular for women) correspond to Axis 6 of the NRPs 2005-2008. The selection of objectives took into account the Lisbon Strategy, which was focused on attracting more people to the labour market and improving workers' adaptability, and the Europe 2020 targets on increasing the employment rate. The objectives were selected according to the needs of Spain, in particular with regard to young people and women's access to employment (in line with the legislative developments in the past years in the field of equal opportunities between women and men).

Starting from 2008, the financial and economic crisis affected Spain and provoked a serious deterioration in the labour market, which made the achievement of the objectives even more pressing. The economic and financial crisis increased these challenges and obliged Spain to focus its action on employment policies.

All Spanish OPs have focused the majority of their efforts on working towards achieving the EU 2020 employment target by increasing adaptability, qualifications and access to employment (with an objective of reaching 75% employment among the 20-64 years-old). In Spain, the gap between the target and the reality differs across regions, although there are some regions that are closer to the EU 2020 target than others.

The contribution of each OP towards this target has been mainly articulated within Priority Axis 1, by developing learning strategies for enterprises and training services for employees in order to improve their ability to adapt to change and foster entrepreneurship skills.

The OPs have also contributed to the EU 2020 education target by reducing the rates of early school leaving below 10% and increasing the number of 30-40 years-old completing third level education, by concentrating resources on actions to support and guide students in order to keep them in the educational system, at least during the mandatory educational cycles. More resources have been dedicated to improve the reading, mathematical and science skills of those below 15 years-old. Moreover, the vast majority of OPs have worked to improve the access to VET and to tertiary education. The development of human capital in R&D has also been given a major importance during this period (2007-2013).<sup>7</sup>

ESF Social Inclusion policy priorities were aligned with the Lisbon Strategy objectives on promoting social cohesion through inclusive labour markets and have, to a certain extent, contributed to the achievement of European 2020 targets. The OP on the 'Fight

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<sup>6</sup> Youth Employment Action Team, Update for the Spring European Council, 14-15 March 2013, CE

<sup>7</sup> ESF Ex post evaluation Human Capital – National Template Spain

against Discrimination’ developed significant interventions aimed at increasing the participation of women and men in employment, with a special focus on people in disadvantaged situations, such as migrants.<sup>8</sup>

## 2 Scale of ESF investment

Spain was allocated EUR 7,981 million ESF funding for the programming period 2007-2013. Including national funding (EUR 3,069 million) and private funding (EUR 115 million) this meant a total budget for the Operational Programmes of EUR 11,202 million, as illustrated in Table 2, below.

Regarding the total investment in the policy fields (total of EU and national contributions), a total of EUR 7,756 million or 69% was allocated to the policy field Access to employment, EUR 2,175 million or 19% to Human Capital, 10% to Adaptability and 0.3% to the policy field Promoting Partnerships. Public expenditure on active labour market policy (ALMP) was EUR 45.3 billion (Cat. 2-7) 2007-2013<sup>9</sup> indicating the significance of the ESF in comparison.

More than half (EUR 6,000 million) of the total funding was allocated to the National OP Accessibility & Employment (A&E). The differences in the financial volumes of the Regional OPs are huge. The largest Regional OP in terms of allocated financial volume was Andalusia (EUR 1,446 million) followed by Catalonia (EUR 508 million), while the Regional OPs with the lowest allocated financial volume were Melilla (EUR 9.5 million) and Ceuta (EUR 12.8 million).

Overall, about 79% of the allocated financial volume was spent by the end of 2014, ranging from 55% within the OP La Rioja and the OP Baleares up to 94% within the OP Asturias and the OP Murcia.

In about half of the OPs, 50% or more of the financial volume was allocated to the policy field Access to Employment. Just three of the OPs (Baleares, Canarias and Andalusia) allocated more than 50% to the policy field Human Capital, and Cantabria was the only OP where more than 50% were allocated to Adaptability.

Table 2. Financial allocation and implementation rate of the ESF programming period 2007-2013

OP	Priority	Financial Allocation	Share of total funding of the OPs	Implementation rate (in %)
All OPs	Increasing adaptability	1,082,384,648	9.7%	78.0
All OPs	Enhancing human capital	2,174,597,071	19.5%	82.1
All OPs	Access to Employment	7,755,922,236	69.5%	78.3
All OPs	Reinforcing social inclusion	This policy field was set as a horizontal principle in the OPs		
All OPs	Promoting partnerships	31,803,559	0.3%	62.5
All OPs	Technical Assistance	157,634,674	1.0%	63.2
All OPs	Total ESF funding 2007-2013	11,202,342,188	-	78.8

Source: SCF 2007

At first sight, considerable difference in implementation rates seem to exist. However, interventions in the field of promoting partnerships, which have the lowest

<sup>8</sup> ESF Ex post evaluation Reinforcing Social Inclusion – National Template Spain

<sup>9</sup> Based on Eurostat data on ALMP.

implementation rate, only represent the smallest policy field of the ESF 2007-2013 programming period with a financial allocation corresponding to 0.3%. While overall these interventions were implemented to high extent as foreseen, in a small number of OPs, such as Castile-La Mancha or La Rioja, no expenses corresponding to this policy field had been allocated by the end of 2014. As a result, the overall implementation rate for this theme is still relatively low.

### 3 Effectiveness by Priority

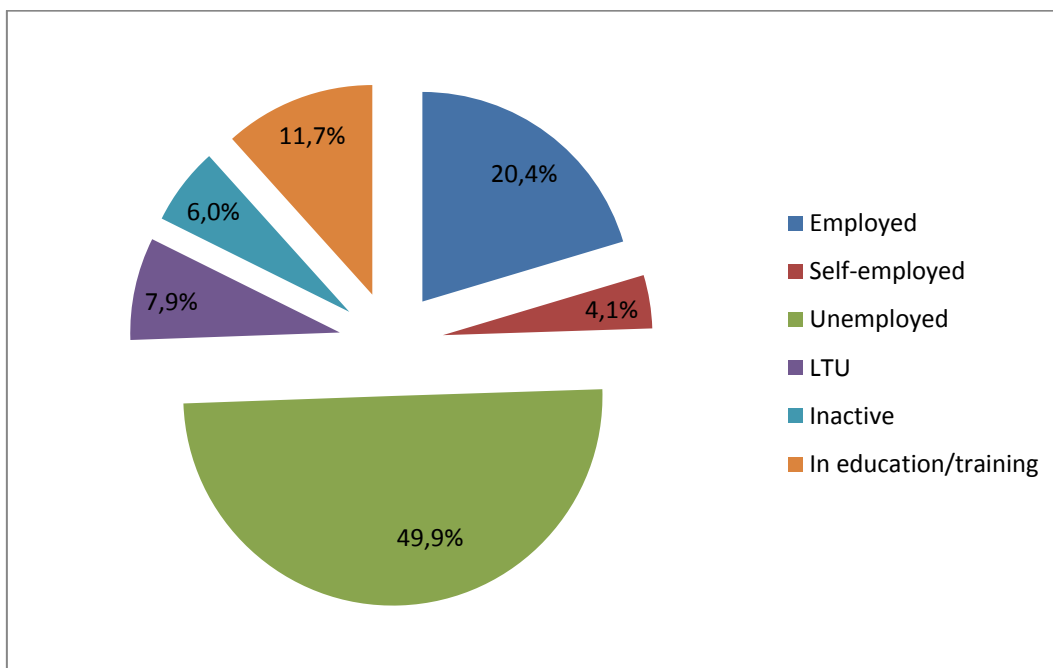
#### 3.1 Outputs and results

##### 3.1.1 Outputs

In total, there were approximately 13.9 million participations<sup>10</sup> in the interventions funded by the 22 ESF OPs of Spain from 2007-2013, of which 46% participated in the interventions funded by the National OPs A&E and Fight against Discrimination (FaD). Regarding the Regional OPs the vast majority was supported under the OP Andalusia (2.6 million) and the OP Catalonia (0.8 million), which are also the Regional OPs with the highest financial volume.

The following figures provide an overview of the employment and educational status of all participants entering over the programming period. More than half of the participants were unemployed, of which 8% were Long-term unemployed (LTU), which corresponds with the high share of participants and the financial volume of the policy field Access to Employment. Twenty per cent of the participants were employed and 18% inactive.

Figure 1. Labour market status of participants in ESF 2007-2013 (entering)

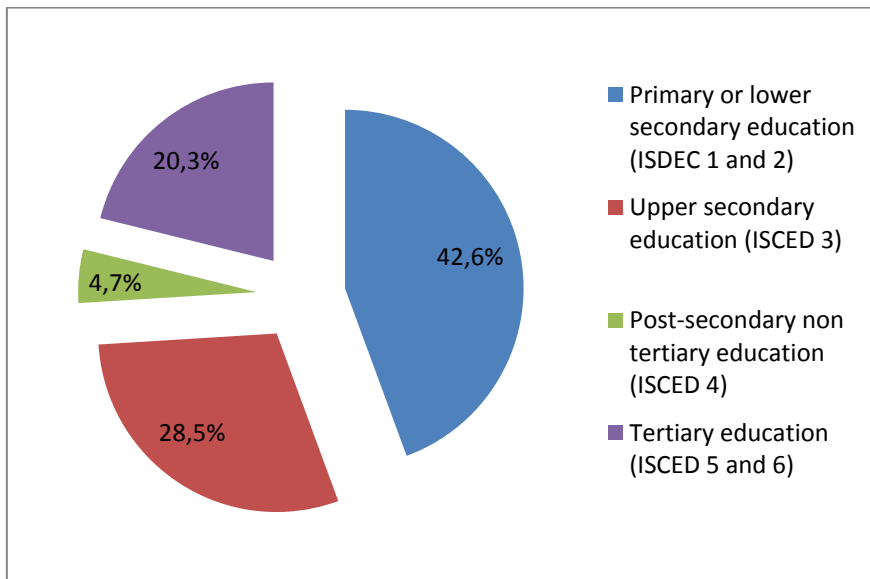


Source: own figure on the basis of SFC 2007 (AIR 2014)

The educational status of the participants corresponds to the employment status of the participants. Most of the supported people in the policy field Access to Employment are unemployed and have a low education status (ISCED 1 and 2). This is also true for each of the regions when looking at the detailed data on the participants. Those regions with a majority of funds and participants in the policy field Enhancing Access to Employment show higher rates of unemployed and lower educated participants than others.

<sup>10</sup> As one person could participate more than once, the term 'participations' is used here. In the remainder of the document, 'participants' is used, but may include double counting of individuals.

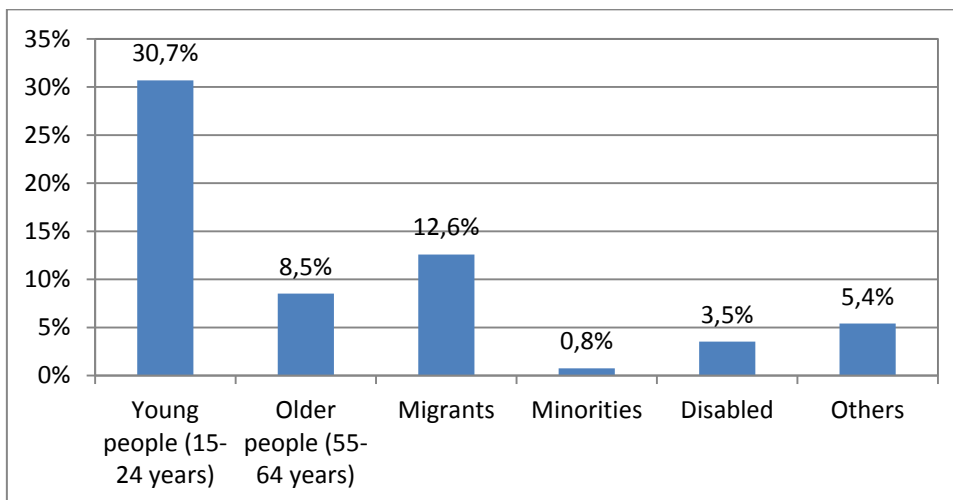
Figure 2. Education status of participants in ESF 2007-2013 (entering)



Source: own figure on the basis of SFC 2007 (AIR 2014)

Regarding vulnerable groups, the Spanish OPs mostly target young people (30.7%) but also migrants (12.6%), and to a lesser extent older people, disabled persons and minorities.

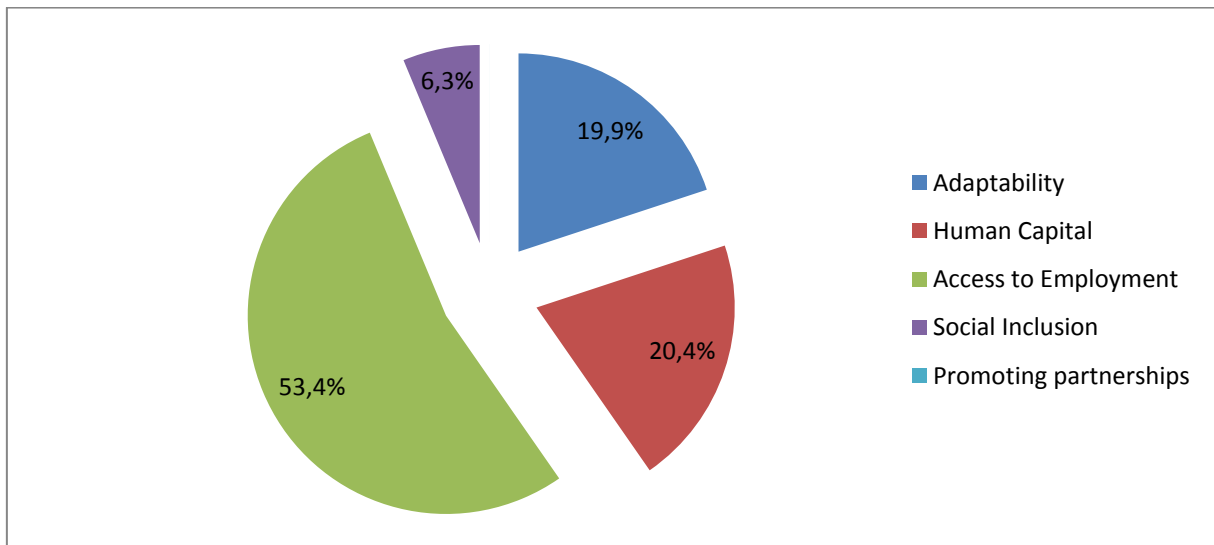
Figure 3. Vulnerable target groups participating in ESF 2007-2013 (entering)



Source: own figure on the basis of SFC 2007 (AIR 2014)

Most of the participants of the Spanish ESF activities were supported within the policy field Access to Employment, as this policy field also received the most funding. Adaptability and Human Capital each accounted for about 20% of the participants.

Figure 4. Share of participants by policy field



Source: own figure on the basis of SFC 2007 (AIR 2014)

Looking at the outputs by policy field, with reference to Table 9 in the annex, we find the following.

### Increasing adaptability

About 2.8 million participations (20% of the total number of participations) were supported in the activities of this policy field, out of which the OP Adaptability and Employment covers 46% (1.3 million). The vast majority of participants was employed (68%) and to a lesser extent unemployed (21%) and inactive (11%). However, the share of employed or unemployed people differs substantially across the OPs because the OPs targeted different groups. Regarding vulnerable groups, the share of migrants, disabled people and minorities is substantially lower compared to the shares illustrated in Figure 3. On the contrary, the share of young people was 16%, while the share of older people was 9%. About one-third of the participants have tertiary education (ISCED 5 and 6) and 26% have either lower education (ISCED 1 and 2) or upper secondary education (ISCED 3).

The share of participants supported within the activities of this policy field varies substantially across the regions. The OPs of the Comunidad Valenciana and La Rioja have the highest share of participants with 49% and 52% respectively belonging to this policy field, while the OP of Baleares have only 0.4% of participants.

Regarding entities, 455,353 companies were supported during this programming period. In most of the cases, this indicator is related to Category of Expenditure 62 (Development of life-long learning systems and strategies in firms; promoting entrepreneurship and innovation), although it is not always clearly explained which activity these outputs are related to. In general, activities such as information provision, business counselling or support to firms are mentioned.

### Enhancing human capital

A total number of 2.8 million participations (34% of the total number of participations) were recorded in the activities of this policy field. Most of them, 89%, were supported within the Regional OPs. Four OPs did not have any action under this policy field: Cantabria, Ceuta, País Vasco and Fight against Discrimination. However, there is a strong concentration in only three OPs which represent 75% (or 2.1 million) of the total number of participants: Andalusia (1.3 million), Extremadura (0.46 million), OP A&E (0.3 million).

Regarding the employment status of the participants, most of them (64%) are inactive, 70% of which are in education or training (e.g. pupils, students), 16% are

unemployed and 21% are employed. The high share of inactive people corresponds with the high share of young people (73%). This strong focus on young people is directly related to the nature of this policy field. Interventions focused on the fight against early school leaving, together with other activities largely directed at young people.

The output indicators related to entities show that only three OPs included any output indicators for this policy field. Two of them include the number of companies who received a direct benefit from the programme (OPs of A&E and Galicia) and the third the number of public entities or public services, which received any support (Extremadura).

### **Access to Employment**

This is the largest policy field of this ESF programming period in Spain. The total number of participations is 7.4 million, which is about 53% of the total participations.

Similarly, to the policy field above, the Adaptability & Employment OP is responsible for the largest number of participants since it mainly focused on Access to Employment (4.8 million participants). However, the ESF programming in the other OPs also focused extensively on enhancing access to employment. For instance, if we would only look at the number of participants in access to employment interventions in other OPs, this policy field still has the largest number of participants. Without this A&E OP, the proportion of participants under this policy field is 46%, still ahead of Enhancing human capital.

In 11 out of the 19 Regional OPs more than half of the participants are supported in this policy field, up to 87% in Murcia and Baleares, while Extremadura, Andalusia, and the Comunidad Valenciana have less than one-third of the participants within the same policy field.

The vast majority of the participants are unemployed (95%; 76% excluding the national OPs) followed by 13% employed people (16% without the National OPs). This pattern is consistent across all OPs with the exception of Castilla La Mancha, Cantabria and Navarra where the majority of the participants are employed.

Regarding vulnerable groups, about 17% of the participants are migrants and 22% are young people, while older people make up 8% of the beneficiaries. Navarra is the only Region where the share of older people is higher than that of younger people.

More than 50% of the participants have primary or lower secondary education (ISCED 1 and 2) and just 20% have tertiary education (ISCED 5 and 6), reflecting the characteristics of the target group of this policy field: unemployed and lower qualified people.

Some 31,532 companies were supported during this programming period in this policy field, in actions mainly related to the modernisation and strengthening of labour market institutions when referring to public services, and the support for self-employment and business start-ups, in general or specifically aimed at women.

### **Reinforcing social inclusion**

Social inclusion was set as a horizontal objective across the various Regional OPs. Hence, the only OP with a PA dedicated to this policy field is the OP Fight against Discrimination. However, there are a few interventions targeting disabled people and people at risk of exclusion, which can be related to this policy field, although no specific output data for these interventions was available.

### **Promoting partnerships**

This is the smallest policy field of this ESF programming period. In total, some 404 participations were supported under this policy field. Regarding beneficiaries, only the OP Comunidad Valenciana had outputs of activities related to geographical mobility of



pupils and teachers of specific vocational courses, training visits abroad, mainly for unemployed, and internships for young people in the EU.

This explains the profile of the participants. Sixty-eight per cent of the participants are young – with no older workers among the participants – and are mostly unemployed (54%) although there are also 46% employed participants. This policy field has a very high share of migrants (82%), women (70%) and the highest education level of the participants, since 62% had tertiary education (ISCED 5 and 6) and another 21% had upper secondary education (ISCED 4).

To summarise, the profile of most of the participants of this policy field is young migrant women with a high educational level.

Information related to entities (including associations, networks and agreements) is available for a number of OPs. Ten OPs planned to 'produce' at least one network thanks to the implementation of their activities, although only seven achieved it. The EEN report concluded that difficulties during implementation of the OPs have meant a lesser emphasis on this policy field, at least in the case of some OPs.

### **Strengthening institutional capacities**

Not relevant for Spain.

### **3.1.2 Results**

Overall, 39% of the result indicators exceeded the target set, while 44% did not. For 16% of the indicators no target was defined or no results achieved. More than half (52%) had reached already 90% of implementation or were close to reaching their targets. Some key figures of the results achieved, across all OPs and different ESF priorities in the 2007-2013 period, are given below and the achieved results are discussed in more detail by the different ESF priorities.

#### **Aggregation of results**

- People into employment: 3,160,266
- People gaining qualification: 97,587
- Other positive results: 1,746,220
- Products: 43,681
- Entities: 51,385

#### **Increasing adaptability**

Before commenting on the results, we would like to highlight the great dispersion of result indicators in the Spanish OPs<sup>11</sup>. Only two of the indicators provide information about 14 OPs (out of 20) and the rest are included in less than 10 OPs. This means that providing overall comments on the Spanish results is not easy, because the indicators cannot be aggregated.

Regarding the improvement in the employment situation, the indicator used more often concerns people who improved their situation in the labour market, accessing a permanent contract instead of a temporary one or becoming self-employed. Measures addressed to increase flexibility have the final aim of improving workers' adaptability (such as reducing temporary working contracts, etc.), and therefore results are not measured in terms of persons gaining new employment. An aggregation of the results shows that the ESF programming did not reach its targets in terms of number of persons. The implementation rates of each aggregated indicator vary between 86% and 100%.

The proportion of people, who increased their adaptability to the labour market and, as a consequence, improved their labour market position or their job was 98% out of the target of 945,000. However, there are striking differences across the regions:

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<sup>11</sup> Dispersion in the sense of a low coincidentally in the indicators chosen.

while the target was exceeded in Galicia (108%), Ceuta (136%) and Andalusia (105%), the implementation rate was very low in Aragon (55%) and Castilla-La Mancha (77%).

The achievement of people in continuous training who maintain their job or have been promoted is also good in terms of reaching the target values set. Overall, the implementation rate reached 98% of the target, and 12 out of 15 OPs show achievement levels of 70% or more. However, there are also three OPs with values around or below 60%. In total 923,154 people participated in this intervention.

Results are better in relation to entrepreneurship. The results in terms of companies created amounted to almost 110% of those programmed<sup>12</sup>, and they are not so dispersed in spite of the low results in Castilla-La Mancha (50%) and Canarias (51%). The indicator related to entrepreneurial projects, which started because of the ESF assistance more than doubled (205%) the final target set (20,031 out of targeted 9,745).

Finally, in terms of adaptability of companies, the achievement levels are more uneven. The indicator used in most OPs relates to companies, which introduced measures for management modernisation,<sup>13</sup> and reached an aggregate level of achievement of 77.5% with two OPs that are near or surpass the programmed target. These are Catalonia (94.5%) and Comunidad Valenciana (116%), respectively.

Catalonia is one of the regions that focus more on this issue as is shown by the three result indicators in this OP. The indicator mentioned in the previous section achieved the best result. The worst result is for the indicator dealing with the rate of companies, which benefitted from specific re-structuring services and maintained all their staff. This was the case in slightly less than 60% of the companies.

Another indicator is related to business projects or companies created as a consequence of the assistance received (92.4%). On this indicator, all OPs performed at least moderately. The last indicator is related to companies starting a risk prevention scheme. Nearly 70% of the target was achieved and the results of all the OPs were at least moderate. In this case, the A&E OP and Madrid exceeded the target (106% and 217% respectively).

### **Enhancing human capital**

Out of the targeted 736,000 pupils, 95% received orientation guidance and support, which helped in them to remain in the education system and complete the compulsory secondary education. The aggregated result is slightly higher than programmed for males (104%) but lower than planned for females (87%).<sup>14</sup> The results are dispersed across the regions and show in some cases gender discrepancies. Take for instance Comunidad Valenciana with an overall achievement rate of 35%, with 15% for men, but 89% for women. In eight OPs, including the OP A&E, the targets were exceeded.

The achievement of the indicator *Number of unemployed people who were trained in innovation and information technologies and who found a job* is below the initially programmed target (71.5% on average, with a minimum value of 54.8% in Aragon).

The number of participants who undertook internships in companies and the number of hours of in-company hours training (only in Extremadura) achieved quite similar implementation rates.

However, there are some indicators which are present in at least six OPs and which provide information that is more relevant. One concerns the improvement of the

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<sup>12</sup> In this case, two indicators were aggregated: 'Companies created' and 'Companies started by men and women'.

<sup>13</sup> It is worded as 'Companies that introduced measures for management modernisation'.

<sup>14</sup> In order to evaluate this data, it is important to mention that before the economic and financial crisis, the drop-out from the educational system rate was higher among men.

system and refers to the number of new qualifications and/or professional certifications achieved. The average achievement is 87%, if we exclude indicators that did not reach any results.

Aggregated results vary considerably in the case of people whose competences acquired through work experience, were recognised. The average is 85% with values ranging from 61% in Catalonia up to 123% in Galicia. There are various reasons why some regions overachieved, while others did not. The main reason of the big variation is that in order to face the economic crisis, the Autonomous Communities made decisions for reprogramming and implementing in a different way, according to different priorities, themes, political and social criteria. There is no a common reason: each Autonomous Community reprogrammed and implemented interventions according to their own needs. In the example above, Galicia chose to focus more on this target group, while Catalonia for instance put more emphasis on a different target group.

To summarise, eight OPs showed high or very high levels of achievement. This is consistent with the situation in which the labour market and economy in general did not encourage people to stop studying and start working. In this period, young people returned to school to complete their secondary education once they were unemployed and their possibilities of obtaining a new job were very low.<sup>15</sup>

### **Access to employment**

The result indicators can be grouped into three categories according to the main issue they deal with: access to employment, access to self-employment and equal opportunities between men and women.

Regarding Access to Employment, the information is reasonably concentrated since most of the OPs include the same indicators. The first indicator of this category concerns the unemployed who participate in active labour measures and, consequently, gain access to employment. Nineteen out of 21 OPs include this indicator that, at an aggregated level, meets the target set (406,185 or 101%). However, the achievement rate across the OPs varies from 46% in La Rioja and 65% in Castilla-La Mancha up to 178% in the Canaries and 248% in Extremadura. Again, these substantial variations between regions are related to the fact that the Autonomous Communities had the possibility to slightly adjust the focus of their programmes to better tailor to needs related to the crisis. In the Canaries and Extremadura, more people could benefit from the intervention than originally foreseen.

Fourteen of the 21 OPs include a specific indicator to measure the access to employment of migrant workers who participated in ESF co-funded activities. The aggregated result in this case is very low (8.4% or 75,338 migrants), due to the low achievement of the OP FaD and the OP Andalusia. Although the Catalonia and Madrid OPs - also of a certain volume - show moderate (Catalonia: 98.86%) to very high (Madrid: 267.7%) results, they cannot balance out the effect of the OP FaD and the Andalucía OP. According to an evaluation report<sup>16</sup>, where the IBs and the MAs were interviewed, the reasons for achieving fewer results in terms of creating jobs consisted on one hand, on the negative effects on employment caused by the economic and financial crisis, above all among migrants, and on the other, the delay in the implementation of financed interventions and therefore a delay in measuring their effects. In addition, it has been remarked that the effects of ESF interventions achieved a positive result in improving migrants' employability, even if the result indicator system did not allow for this type of assessment as it focused on measuring their insertion in the labour market.

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<sup>15</sup> EEN Country Report Spain

<sup>16</sup> Informe de la evaluación estratégica tematica sobre Inmigración, FSE 2007-2013 (2011).

The interviewees stated that the ESF interventions had a positive impact on the employability of migrants, which cannot be measured by a result indicator that only covers labour market inclusion.

The National OP A&E is the only one that includes an indicator measuring the sustainability of employment for the participants (180 days after their participation) entering employment. Its result of 2,270,668 exceeds the target value by 2.6%. Taking into account the number of unemployed people that participated in the activities of this OP (approximately 3.8 million), about 60% of the participants are employed six months after their participation.

The activities providing childcare facilities so that people can access the labour market were reported in nine out of 21 OPs. The performance can be considered as good, as only the OP Canaries stayed far below the target value. Due to the good performance of the OP Andalusia and the OP Cantabria, the aggregated achievement rate reached 32,831 persons (152% compared to target).

The achievement rate of companies which introduced measures to fight against gender inequality in the workplace is rather low (75.3%) in the 12 OPs where this indicator was reported. Again, the results vary between 181.8% for Castilla-León, 140.0% for Madrid, 35% of Baleares and 61% of Canaries.

### **Reinforcing social inclusion**

Two indicators (number of persons with disabilities hired; number of persons at risk of exclusion hired) concern this policy field. Again, not all OPs reported these result indicators (16 in case of persons with disabilities; 19 in case of persons at risk of social inclusion).

Regarding the inclusion of persons with disabilities, 59,148 out of targeted 58,519 were hired (101%). Again, there were striking regional differences. As under the other ESF priorities no clear pattern exists; each Autonomous Community reprogrammed and implemented interventions according to their own needs, resulting in different results across the regions. In four regions (Castilla La Mancha, Comunidad Valenciana, Andalusia and La Rioja) the achievement rate is below 50%, while others (as Castilla and Leon, Melilla, Galicia, Aragon, Madrid and the OP FaD) exceeded the respective targets set.

Regarding the integration of people at risk of exclusion (Roma among others), the aggregated achievement rate is 135% (145,000 out of targeted 105,000 participants). The regional differences are not as great as above because only Ceuta and Comunidad Valenciana did not achieve the targets set (17% and 37% respectively). Other regions were close to the targets set or exceeded them.

There is no information available to explain why the indicator relating to the objective of people at risk of exclusion is exceeded, while the one relating to people with disabilities fell short of the target.

### **Promoting partnerships**

This policy field is not clearly visible in this programming period in Spain. Although it is included in 11 OPs (out of 21), no result indicators have been defined in most cases.

- The OP Andalusia includes one indicator related to the networks and associations created, with a result of 25% of the programmed target (3 out of 12).
- Castilla-León and Extremadura include one indicator on the number of networks and local employment initiatives created in this period. However, only Castilla-León shows some results – and these are well above the expected (135.5% or 271 out of targeted 200) – whereas Extremadura does not record any result (0%).

### **Strengthening institutional capacities**

Not relevant for Spain.

### 3.2 Evidence of effectiveness

The availability of evaluation findings on results is scarce, especially in relation to specific ESF policy fields. Most of the Spanish evaluations are very descriptive and focused on the analysis of monitoring information.

At national level, it is difficult to draw conclusions, due to large regional differences, even for indicators that performed particularly poorly, such as the 'number of people who improved their situation in the labour market, had access to a permanent contract instead of a temporary one or became self-employed', which reached 4.8% of its initially targets set. Still, some Autonomous Communities like Aragón presented much better results than initially projected (260.7%) or others, such as Asturias, Ceuta or the Basque Country, obtained the targeted results. However, because of the low figure of Andalusia (1.4%), the overall result is poor. These differences are due to the different decisions taken by the various Autonomous Communities in reprogramming in the face of the economic crisis. The situation improves when analysing entrepreneurship results (the companies created reached almost 63% of those programmed) and adaptability of workers and entities (the proportion of people who increased their adaptability to the market and, as a consequence, improved their labour market position or their job was 83% of the target<sup>17</sup>).

Analysing the enhancement of human capital, it is possible to highlight the positive results achieved in Castilla-La Mancha where ESF measures contributed to two major aims: increasing the critical mass of researchers in the region by facilitating the entry of young people or new researchers into a very rigid system, and consolidating entities through increased financial security and a good complementarity with other sources of finance at national, regional level and at universities<sup>18</sup>.

Concerning reinforcing social inclusion, ESF interventions achieved 139,400 job entries: almost 102,000 were people at risk of exclusion in general and 37,500 were people with disabilities<sup>19</sup>. Moreover, regarding the interventions targeted at migrants, the IB and the MA stated that, although there were certain difficulties in the implementation of the activities (as mentioned above), they consider that the ESF actions had a positive impact on the employability of migrants. An impact evaluation found that 98% of the participants stated that the measure increased their employability. Of the respondents, 86% consider that their participation had a positive impact on their social integration<sup>20</sup>.

- Among those interventions addressed to people living in rural areas, the intervention 'Professional experience programmes' of the OP Extremadura responded in an effective and efficient way to the challenges as the participation of local entities ensured the intervention could respond to local needs according to the geographical zones (rural and urban). Results were very positive: the young people's unemployment rate was reduced to 24%; the same was true for women. Therefore, this intervention was considered very productive<sup>21</sup>.
- Among the interventions aiming to promote gender equality, the intervention 'Promotion of Equal opportunities in local entities (Training and labour orientation actions addressed to women)' of the OP Extremadura can be considered productive as it was shown to be able to increase the employability and labour market insertion rate of women living in Extremadura Region. It also increased the awareness on gender equality issues and on work-life balance related issues.<sup>22</sup> It achieved an increase of women's employment, with 12,000 women entering the

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<sup>17</sup> ESF EEN Main ESF achievements 2007-2013 in Spain

<sup>18</sup> Evaluation report on the research incentives: scholarships and call for project proposals in the framework of the ESF OP 2007-2013 Castilla-La Mancha

<sup>19</sup> ESF EEN Main ESF achievements 2007-2013 in Spain

<sup>20</sup> Informe de la evaluación estratégica temática sobre Inmigración, FSE 2007-2013 (2011).

<sup>21</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Horizontal Analysis

<sup>22</sup> Idem

labour market so that the female activity rate increased<sup>23</sup> in the region to 50%. At the same time, the share of self-employed women increased to 12%.

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<sup>23</sup> By 8%

#### 4 Efficiency by theme

Due to the lack of available data, it is not possible to present an overall picture of efficiency of the interventions implemented. This information is not included in the 2014 AIRs and there is no specific evaluation of efficiency.

The only detailed data is for the interventions in the policy field Access to Employment. In assessing the efficiency of the interventions with available data it can be remarked that most of them were characterised by low costs in comparison with the achieved results, and this underlines their efficiency.

Among the various interventions that aim to improve institutions and systems, the intervention Employment Service Offices of Catalonia is noteworthy; it introduces a new model for employment counselling, targeting unemployed people in the regional government's IT system. Its implementation resulted in reduced costs, as it was incorporated in the regional budget and in the internal IT system of the Employment Service of Catalonia, achieving efficiency in intervention costs, disposing of digitalised and systematised information, saving time and costs.

On the other hand, those interventions focused on improving target groups' employability by providing training courses and apprenticeship programmes produced higher costs per output due to the nature of the activities involved.<sup>24</sup>

Table 3. Cost effectiveness of Spanish interventions

OP	Intervention	Allocated expenditure	Certified expenditure	Financial implementation rate (E/D)	Cost per participant	Cost per entity	Cost per product
National OP (ES)	Allowances for Social Security payments for hiring women, young people (until 30 years), people older than 45 years and disabled people	1,121,685	669,767	60%	EUR 633		
National OP (ES)	Employment workshops	36,782	16,863	46%	EUR 10,576		
Andalusia	Gender Units in universities and Andalusian Institute of Woman	886,311.89	667,866.85	75%	N/A	EUR 15,000 per year to every university and EUR 100,000 per year to the Institute of women's studies	
Extremadura	Training and labour orientation actions addressed to women	2,432,964	2,432,963.54	100%	N/A	N/A	N/A
Cataluna	Recruitment of equal opportunities agents in	3,875,733.36	3,875,733.36	100%	N/A	EUR 9,000 per agent	

<sup>24</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Country Report Spain

OP	Intervention	Allocated expenditure	Certified expenditure	Financial implementation rate (E/D)	Cost per participant	Cost per entity	Cost per product
	employment centres						
Andalusia OP	Professional experiences programmes	341.815.868	2.370.819,53	0.69%	EUR 10,089		
Madrid OP	Personalized orientation and accompanying itineraries	746.873,97	746.873,97	100%	EUR 63.54		

Source: ESF Ex-post evaluation Access to Employment – Country Report Spain

'Recruitment of equal opportunities agents in employment centres' conducted in Catalonia had a cost of EUR 9,000 per agent which corresponded to ESF contribution, as the intervention was financed on one hand, by the Employment Service of Catalonia and on the other, by the participating local entities (with the former in charge of financing training activities and the latter in charge of management costs including those generated by agent's activities).

Concerning Social Inclusion, the delay in certifying costs is due to the rigid management of the implemented control system and budget limitations of the Spanish public administrations in consequence of the crisis, which hindered the provision of sufficient liquidity for co-financing many foreseen interventions<sup>25</sup>.

While Table 3 above lists the cost per participation in the Access to Employment priority for a number of OPs, Table 4 below, lists the overall cost per output unit per ESF priority, calculated on the basis of SFC data. The data for promoting partnerships are an outlier, and cannot be compared to other priorities. The priority had a very low number of participants, and mainly focused on creating networks between entities across the various OPs. When comparing Human Capital interventions with Access to Employment, the interventions of the latter were almost double in cost. This is explained by the need of additional efforts in providing assistance towards finding employment, while human capital often consists of finalising a course and obtaining a certificate. This pattern is also observed in most Member States. However, in comparison to the cost per participant of similar national ALMP measures, the cost of ESF investments are relatively small. In 2007-2013 the cost per participant for national ALMP interventions (as recorded by Eurostat) were on average EUR 2,230. While the character of these interventions cannot be compared in detail, this provides some sort of benchmark for ESF interventions, suggesting a high level of efficiency.

Table 4. Cost per output by theme

Theme	Cost per output (in EUR)
Enhancing Human Capital	470
Access to Employment	820
Reinforcing Social Inclusion	N/A
<b>Total</b>	<b>671</b>

Source: SFC 2007; Authors' calculation

<sup>25</sup> 2013 Operational Evaluation ESF OP Fight against Discrimination 2007-2013



## 5 Sustainability

In considering sustainability of results for participants, as well as of interventions, it is relevant to mention that due the economic and financial crisis in Spain (which necessitated a change of priorities of the Operational Programmes), some of the interventions did not have continuity within the financing period 2007-2013. For that reason it is not always possible to demonstrate their sustainability in terms of results or activities.<sup>26</sup>

### **Sustainability of result for individuals and entities**

There is only one result indicator measuring the number of participants who are still employed 180 days after completing the measure. However, it is only reported in the OP A&E. Out of the 3.9 million participants of the second Priority of this OP, 2.3 million (=58.7%) are still in employment 180 after completing the measure. There is almost no gender variation for this indicator (59.4% Men; 58.1% Women).

Concerning those interventions providing allowances for generating employment, the one at national level providing allowances for Social Security payments and promoting employment produced sustainable results. Some 65%-70% of people recruited through this programme are still employed, according to the data provided in the interview to the responsible person from the Management and Monitoring System of Community Funds of the National Public Employment Service. There are currently plans to continue with the intervention in the new financing period 2014-2020, targeting additional groups such as young entrepreneurs, women, people with disabilities, self-employed, workers belonging to hospitality sector and professionals of R+D+i. According to the data received, 30% of participants in employment workshops attained a job in companies or local entities.<sup>27</sup>

### **Sustainability of interventions**

Among those interventions addressed to improve public administration, the one aiming to improve the Public Employment Service (PES) of Catalonia achieved sustainable results, as the Regional Government incorporated the new process model developed in the regional employment service of Catalonia. Moreover, Regional Government made it a compulsory part of the regional IT system, so it is part of the process of the employment offices of Catalonia in the training sessions addressed to 800 professionals as well as the elaboration and distribution of a guide on the tool. Moreover, the new model was presented in Madrid as good practice in 2014 as the Government is considering whether to implement it at national level.<sup>28</sup>

Finally, due to their characteristic of being long-term actions to implement organisational changes, interventions to determine that the existing gender equality units in public bodies are sustainable and persist in the promotion of gender principles and the application of the principle of equal opportunities between men and women throughout the region.

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<sup>26</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Country Report Spain

<sup>27</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Country Report Spain

<sup>28</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Horizontal Analysis

## 6 Gender sensitivity

The improvement of equal opportunities between men and women was one of the key challenges listed in the NSRF.

Overall, the share of women among all participants during this programming period in Spain is 54.7% (=7,582,470 participants). As illustrated in Table 5 below, the share of women varies across the policy fields, with Increasing Adaptability having the lowest share (47.1%) and Promoting Partnerships (although the number of participants in this policy field is very small) having the highest share of women (69.2%).

Across the OPs the share of women varies between 42.6% in Navarra and 43.2% in Baleares rising to 67.2% in Cantabria and 77.8% in Melilla. The high share of women in the latter is due to the strong focus in gender equality in this OP as there was a strong gender gap in the labour force participation rate in 2006 (69% for men, 37% for women). There is proof that in Melilla during this programming period the gender gap was reduced (to a participation rate of 65% for men, and 46% for women).<sup>29</sup>

Although gender sensitivity was treated as an integrated aspect in most of the OPs, some interventions were targeting women more than others. The activities aimed at incorporating people into the labour market by offering childcare were successful in terms of participations compared to the final target, as mentioned above.

The number of businesses created is distributed equally among men and women with about 30,800 each. However, the number of businesses that implemented measures to fight gender inequality in workplaces did not reach the final target set, as only 3,877 out of 5,183 planned (75%) participated.

An evaluation on gender equality<sup>30</sup> reported that 60% of the people from equality bodies interviewed assessed that the contribution of the ESF was of great value, and that without the ESF funding it would not have been possible to implement the gender equality strategy in the respective region the same way.

It is important to mention that after the change of priorities of the OPs in order to face the economic and financial crisis, a high number of gender mainstreaming interventions were no longer financed, hindering their contribution to tackling gender discrimination and gender inequalities in the labour market as well as in society.<sup>31</sup>

Table 5. Share of women by Priority

OP	Priority	Share of women (in % of total participants)
<b>All 22 Spanish OPs aggregated</b>	Increasing adaptability	47.1%
	Enhancing human capital	48.2%
	Access to Employment	60.1%
	Reinforcing Social Inclusion	54.1%
	Promoting partnerships	69.8%
	Total share of women	54.7%

Source: SCF 2007; Author's calculation

Among the interventions carried out, the Spanish intervention 'Promotion of Equal opportunities in local entities' (Training and labour orientation actions addressed to women) comprised many actions to promote women's labour integration in the regional context (awareness raising campaign on equal opportunities and on

<sup>29</sup> AIR 2014 Melilla

<sup>30</sup> Informe de Evaluación Estratégica Tématica de Igualdad de Oportunidades entre Hombres y Mujeres, 2010.

<sup>31</sup> ESF Ex post evaluation Access to Employment 2007-2013 – Country Report Spain

entrepreneurship) training modules for specific sectors (such as tourism), job counselling and ICT training courses.

Moreover, the intervention from the Catalonia Region was aimed at promoting equal opportunities between men and women in the labour market (private and public entities), by creating a network of equal opportunities agents in employment centres around the region. This intervention was implemented by four Provincial Governments, including Barcelona, by creating 120 equal opportunities agents in employment centres between 2007 and 2010. Another intervention, from Andalusia Region, aimed at strengthening gender equal opportunities in the universities of the region by creating gender units in each university that designed and implemented gender equality plans in the institutions. The intervention also funded the Women's Institute of Andalusia.

## **7 Community Added Value**

### **7.1 Volume effects**

The volume effects of the ESF are clear. The total ESF budget 2007-2013 in Spain amounts to roughly 30% of all investments in active labour market policies in Spain during the entire programme period<sup>32</sup>. It is however important to mention that the economic and financial crisis, which affected Spain, resulted in a high percentage of planned interventions not being implemented during the financing period 2007-2013 as the Autonomous Communities had to face a difficult financial situation. In some cases a very low financial implementation rates resulted, such as in Andalusia (58.20%), Catalonia (47.16%), Madrid (57.39%), Extremadura (69.60%) and the National OP of Adaptability and Employment (62.97%)<sup>33</sup>. In these cases in particular, the crisis mostly affected entities and institutions in their capacity to co-finance interventions, as well as their existence in the first place (due to risk of bankruptcy). In addition, a high percentage of ESF financial resources were not implemented for a variety of reasons including political changes, the eligibility of actions and the n+2 principle, which delayed certification of costs and transposition with EU laws.

Already in the programming, this is reflected, in the reduction of the available budget by EUR 380 million compared with the original OPs. However, in many instances abandoned investments were reprogrammed to more directly address the effects of the crisis. No less than EUR 1.4 billion were reprogrammed from adaptability objectives into additional investments in the field of unemployment.

### **7.2 Scope effects**

The various reports on the ESF programming in Spain generally do not analyse interventions according to scope, role and process effects. This limits the possibilities to analyse this aspect according to the available data. However, it can be stated that in some cases ESF resources broadened existing actions by supporting policy strategies that would not have otherwise received support.

Among those long-term actions implemented such as the Andalusian intervention 'Gender Units in universities and the Women's Institute of Andalusia', scope effect was guaranteed as the internal changes they provided to the participating public entities, such as the promotion of gender principles and mainstreaming. Also the application of the principle of equal opportunities between men and women were guaranteed throughout the regional territory.

The Andalusian intervention 'Professional experience programmes' also showed a scope effect consisting in being one of the few apprenticeship programmes in Spain outside the educational and training field addressed to disadvantaged groups such as migrants without an educational background.

### **7.3 Role effects**

Due to the lack of available data concerning role effects of the ESF interventions, and also due to the economic and financial crisis which hampered the ESF role effects, it is not possible to carry out a deeper analysis on this aspect. However, the best anecdotal example of possible role effects due to ESF 2007-2013 is the employment counselling service provided by the Public Employment Service Office of Catalonia. This service was incorporated into the internal IT system of the Autonomous Community, making it therefore compulsory for all Public Employment Service Offices of the region and

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<sup>32</sup> The total ESF budget foreseen for the 2007-2013 programming period for Spain corresponded to EUR 6 billion for Convergence Objective Regions (EUR 5 billion as EU contribution and EUR 1 billion as national public contribution) and EUR 5 billion for Competitiveness Objective Regions (EUR 3 billion as EU contribution and EUR 2 billion as national public contribution).

Eurostat data shows that in 2007-2013 a total of EUR 45.3 billion has been spent on active labour market policies (type 2-7) in Spain.

<sup>33</sup> Information provided in AIR's 2013.

presented at national level as good practice in 2014. The government is considering whether to implement it at national level.

Concerning interventions aimed to reach equal opportunities between men and women, after the implementation of the intervention titled 'Recruitment of equal opportunities local agents' in the Autonomous Community of Catalonia, a new higher level vocational training qualification was introduced: 'Promoció per a la igualtat efectiva de dones i homes' (Promotion of effective equal opportunities between men and women) belonging to the professional qualification group of 'Social and Cultural Services and Services addressed to the community' of the Spanish National System for Qualifications and Vocational Educational and Training (SNCFP). The role effect of this intervention consisted in giving continuity to the new vocational training qualification in the European project: 'Passage - Professionnalisation Aux SavoirS Autour du Genre et de l'Égalité' European Project (Nº 2014-1-FR01-KA200-008482) whose project partners are the Autonomous University of Barcelona - UAB and the Enterprise and Occupation Department of the Regional Government of Catalonia.

Regarding Social Inclusion, there is a consensus among involved ESF actors that the ESF role was relevant to introduce innovative activities and to reach new target groups. ESF was used to improve the education and training delivery systems and methods in the case of several OPs and to provide additional funding for the activities linked to the educational system.

#### 7.4 Process effects

Process effects are reached when considering ESF contribution as a key aspect for reinforcing the Regional Strategies. These contributions are perceived as a catalyst for strengthening the commitment of the regional public sector in order to provide appropriate responses to the different regional needs. Therefore, analysing results, ESF actions influenced the Spanish administrations and organisations involved in the programmes, as they could implement interventions aimed to change and improve regional public services, alleviating the effects of the economic and financial crisis.

In relation to equal opportunities, process effects are reached when considering ESF contribution as a key aspect for reinforcing the Regional Equality Strategies. These contributions work as a catalyst for strengthening the commitment of the regional public sector in order to provide appropriate responses to the different needs of women and men<sup>34</sup>.

Among the interventions aiming to improve Public Employment Services, the one implemented in Catalonia had sustainable results, as the Regional Government incorporated the new process model developed in the regional employment service. Mainstreaming is likely as it is possible to replicate this model in other contexts, by presenting it as good practice: currently the national Government is considering implementation of the new employment service model at national level.

Moreover, the study on the relevance and effectiveness of the network model co-funded by the ESF<sup>35</sup> contains some findings and conclusions that can be considered examples of process effects.

The main findings of this study are outlined below.

The effects of the networks are more internal than external, and they are more frequently found in the transnational networks than in the inter-regional networks.

The most common internal effects are improvements in the social and technical capital of the networks and their members and, more precisely:

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<sup>34</sup> ENN Country Report Spain - Contribution of ESF to Women

<sup>35</sup> 'Study on the relevance and effectiveness of the network model co-funded by the ESF and the results of the participation in them in the current programming period 2007-2013'

(a) The strengthening of formal links among the members generates new relations embodied in other networks.

(b) A more precise vision of the issue the network deals with.

(c) Improvements in the competences and skills of the members of the network.

Among the external effects, the following can be highlighted, in decreasing order of frequency:

(a) Extension of the links with policy makers and alliances with lobby groups.

(b) Setting issues in a more central and visible position, from a political point of view.

(c) Promotion of the horizontal interaction among local and regional actors and civil society and a vertical interaction among different levels of political advocacy.

The report also explains the features which are more commonly associated with successful and failed networks, but that is beyond the scope of the specific CAV. However, they can be useful in terms of how to conceive and organise this sort of network in the next programming period.<sup>36</sup>

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<sup>36</sup> EEN Country Report Spain

## 8 Socio-economic impact

### Macro-level

The changes in macro-level indicators during this programming period, shown in Table 6 below show that the employment rates were still decreasing until 2013 with 2014 indicating a first increase. The employment rate of young people was at an alarmingly high level, however, compared with the EU-28, only Greece had a lower youth employment rate in 2014. At the same time, the share of NEET was lower than general unemployment, which may be explained by the fact that many young people are still at school. The share of population at risk of poverty has been increasing continuously, despite the first positive changes in employment rates in 2014. Indicators in the field of human capital show a consistent reduction of the share of early school leaving and slight increase in the levels of educational attainment.

Table 6. Socio economic indicators, 2007-2013

	2007	2008	2009	2010	2011	2012	2013	2014	Trendline
<b>Access to Employment</b>									
Employment rate	65.8	64.5	60.0	58.8	58.0	55.8	54.8	56.0	
Unemployment rate	8.2	11.3	17.9	19.9	21.4	24.8	26.1	24.5	
Young people NEET, 15-24y.	12	14.3	18.1	17.8	18.2	18.6	18.6	17.1	
Employment rates, Females, 15-64y.	55.3	55.4	53.3	52.8	52.6	51.2	50.3	51.2	
<b>Human capital</b>									
Early school leaving	30.8	31.7	30.9	28.2	26.3	24.7	23.6	21.9	
Educational attainment	40.9	41.3	40.7	42	41.9	41.5	42.3	42.3	
<b>Social Inclusion</b>									
Population at risk of poverty	23.3	23.8	24.7	26.1	26.7	27.2	27.3	29.2	

Source: Eurostat

### Meso-level

At the meso-level, the results achieved by the various institutional capacity building interventions are relevant. For instance the results achieved by ESF in supporting the modernisation of the Catalunyan PES shows the potential of reaching results at the meso-level that indirectly contribute to individual beneficiaries. Another relevant issue, which brought a social and economic impact, is represented by the scope of environmental issues among participants' ESF interventions. According to the ESF SFC database, the number of people who attended an environment awareness module corresponded to 786,789, and the number of people who attended training course specifically on the environment field was 206,433. The high values achieved relate to the cross-cutting character of many interventions co-financed by ESF, included in all Priority Themes of ESF programming aiming at adopting an environmentally sustainable development model, and the double objective of sensitising people to the relevance of protecting the environment and profiting from the potentialities of environment related actions in order to create quality jobs by improving professional competences and acquiring professional qualifications relevant to the environment field.

### Micro-level

Overall, summarising all result indicators which are linked to people getting a job, 739,704 people (47% men, 53% women) were hired during this programming period. However, no qualitative conclusions (duration of contract, kind of job) can be drawn from the result indicators. It is therefore also difficult to relate these results to changes in the macro-indicators. Given the substantial number of beneficiaries that reach employment, ESF is likely to have prevented even higher unemployment figures in the years of the crisis.

For the larger part of the interventions there is a lack of information on expected impacts. There are cases, however, where there is such information. An example is the intervention 'Promotion of Equal opportunities in local entities (Training and labour orientation actions addressed to women)' where before the intervention started clear expectations existed for the expected impacts on women's employment (from 48% to 57%) and increase business start-up rate by 25%. The increase of women's employment was achieved, as 12,000 women entered the labour market, so that the female activity rate in the region increased<sup>37</sup> reaching 50%. At the same time, the share of self-employed women increased reaching 12%. The intervention is effective, as it has shown to be able to increase the employability and labour insertion rate of women living in the Extremadura Region. It also increased the awareness on gender equality issues and on work-life balance related issues.

During the programming period, 112,888 businesses were created (this result indicator was available in 14 OPs). Even if overall data are not available, the relevance of the promotion of business in the third sector has to be highlighted. This concentrates in the field of social economy which contributes to social and economic impact by the creation of employment for those vulnerable groups in or at risk of social and labour market exclusion. More specifically, the 'Employment and Solidarity-focused Entrepreneurship groups' intervention, aimed at boosting the labour market entry through the creation of teams organised as a company and guided by a coach, reached a high social and economic impact rate, obtaining labour insertion for 60% and training for 41%<sup>38</sup> of participants.

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<sup>37</sup> By 8%.

<sup>38</sup> AIR 2014 ESF National Operational Programme Fight against Discrimination



## 9 Key lessons learned

### 9.1 What are the key lessons in terms of policy choices?

The ESF Operational Programmes had to face the social and economic consequences resulting from the crisis such as the reduction of quality jobs, increase of temporary employment contracts, increasing poverty and inequalities and lack of labour opportunities for young people, women and other vulnerable groups.

To deal with the new situation, new policy choices were made, putting aside those measures that were no longer considered relevant for the new Spanish situation and refocusing on relevant issues such as creating new jobs (even if precarious) and supporting the most affected groups.

The Spanish Autonomous Communities redefined and assessed the new labour situation and the consequent labour market needs, implementing 'remedial' actions to alleviate problems related to unemployment, to make a more rapid use of the available funds and to achieve faster impact in the urgent situation.

Choices on 'remedial' measures and actions were not only appropriate to the new labour market situation, but also reflected what was required by the European Union through the Country Specific Recommendations 2011-2014 and therefore the National Reform Programmes 2007-2013: A need to improve employability, promotion of training adapted to labour market needs, create employment above all for vulnerable groups (including young people), modernisation of public employment services and monitoring and support to unemployed people, among others.

As section 1.1.3, above, lists in greater detail, an important lesson learned for the new programming period, is that it is **useful to continue to take the ongoing development of EU guidelines and recommendations** into account in order to have a wider vision of employment in order to make adequate and appropriate policy decisions and to face new situations.

### 9.2 What are the key lessons in terms of target groups?

The 2004/741/CE Recommendations of the European Council, of 14th October 2004, on the application of employment policies in Member States, remarked that the unemployment rate in Spain was higher than the European average and, in addition, was accompanied by other problems such as regional inequalities in the field of employment, low participation of women, high unemployment rate of older workers, high number of fixed term working contracts, low productivity of the labour force, low educational level and a low participation in training adults. Besides that, Spain was facing a high rate of migration, which unsettled the supply of labour.

Therefore, in the case of Access to Employment interventions, for instance, priority target groups were established in order to make the planned measures efficient and effective and to concentrate ESF Access to Employment priorities on appropriate target groups. These were unemployed people in general, but above all vulnerable groups such as young people, women, people over 45 years-old, long-term unemployed people, migrants, people with disabilities and low-skilled workers.

Concerning those actions aimed at social inclusion, target groups were defined in order to achieve a double final aim: on the one hand, achieving their labour market integration by performing a job according to each person's qualifications and abilities and therefore making a more efficient use of the human capital and, on the other hand, entering a job where their group was poorly represented meant breaking down stereotypes in society.

A lesson learned for the new programming period is that it is extremely **important to define interventions' target groups at a sufficient level, but to do so in a flexible way**, in order to achieve not only the planned results, but also a multiplier effect, making an efficient use of the ESF fund. Moreover, it is important to define an

appropriate action line addressed to vulnerable groups, in order to prevent them from being negatively affected by reprogramming and restructuring of measures and interventions.

### 9.3 What are the key lessons in terms of the appropriate programming?

In terms of appropriate programming, the restructuring of measures and actions to deal with the new labour market situation caused by the crisis was appropriate to this new situation. With the final aim of improving target groups' employability, supporting and promoting their employment, direct and indirect interventions were implemented:

- Direct actions that directly involve target groups, trying to achieve a direct impact among them, within the intervention timeframe and beyond.
- Indirect actions addressed to institutions or entities, in order to improve efficacy in their provision of services or to hire professionals for the promotion of fundamental principles such as gender equality and work-life balance. Moreover, some indirect actions target entities by supporting them in hiring unemployed people. As such, these entities are the target groups of the interventions, while unemployed individuals remain the final beneficiaries.

After the change of priorities within the Operational Programmes when faced with the economic and financial crisis, there was a large number of interventions aimed at gender equality for which financing was discontinued, hindering therefore their contribution to the fight against gender discrimination and gender inequalities in the labour market as well as in society. This shows that despite possible changes in priorities throughout the programme period, it remains important to continue to **employ a wide variety of interventions**, through which the broader objectives may be reached.

Concerning Human Capital, in order to tackle the corresponding challenges, the Spanish OPs dedicated important parts of their resources to tailoring the implementation of policy actions to each targeted objective. Analysing available data, it seems that, despite some specific actions having been taken in order to encourage the implementation of health and safety measures at work and increase employees' adaptability to change, the ageing population appears as continuing threat requiring attention in the policy agenda.

### 9.4 What are the key lessons in terms of the effective implementation?

Despite the clear need for reprogramming of the existing interventions in OPs, as a result of the crisis, the Annual Implementation Reports and evaluations show that the implementation was overall adequate and helped to alleviate the consequences of the economic and financial crisis and consequently improve the situation of target groups.

However, from a management and organisational point of view, the financial forecast of the implementation of ESF actions was not adequate. This was on one hand, due to some deficiencies detected in gathering information for the ESF database and in the process of checking the eligibility of certain entities for payments, and on the other, due to organisational and coordination problems concerning entities that lost additional support, making it impossible to deliver implementation in an efficient and effective way.

For the new programming period, it is important to **establish a simple, clear and effective system equipped to deal with planned restructuring and reprogramming of interventions** in order to rapidly react to new challenges in an adequate and appropriate way, as well as to improve the process of coordination and organisation among entities in order to implement interventions in a smooth way.

## 9.5 What are the key lessons in terms of monitoring?

According to the results of the evaluations carried out, the monitoring system requires improvement. There is a clear need to **introduce an improved framework of output and result indicators in order to monitor ESF interventions in a more exhaustive way**, to extract useful conclusions from the implementation, to make proposals for corrective or improving actions when necessary, and to provide a response in a coherent and consistent way to the result-based approach of Cohesion Policy.

In addition, the Annual Implementation Reports are not always reliable in terms of quantitative and qualitative information and do not always provide exhaustive information about the implemented interventions. It is important to adapt them to the information requirements that arise when analysing and evaluating ESF actions by adding sections that would allow to examine in depth the priority themes. In addition, in those cases where certification of costs is not possible, it is important to be able to modify the information already gathered in the Annual Implementation Reports, in order to avoid contradictory information.

Therefore, for the new programming period, it is important to **establish an improved monitoring system, with output and result indicators that effectively reflect what has been implemented and that allows an effective measure of impact** and to evaluate the sustainability of results and interventions. The need to develop a monitoring system which is simple, robust and easy to follow, eliminates mistakes and inconsistencies, and therefore makes it possible to overcome and improve weaknesses detected in the programming period 2007-2013, is clear.

## 9.6 What are the key lessons in terms of evaluation?

Despite the multi-annual planning carried out in each Spanish Autonomous Community at the beginning of the funding period 2007-2013, the lack of corresponding and relevant evaluations makes it difficult to analyse the results in order to build upon the positive and learn from the negative.

The availability of evaluation findings on results is scarce, especially in relation to specific ESF policy fields. Most of the Spanish evaluations, as well as AIRs (in which quantitative information is not explained in qualitative terms and the information is not given at the activity level - only at PA or OP level), are very descriptive and focus on the analysis of monitoring information. Moreover, according to the Managing Authorities, the information is shown in a separate and fragmented way, which does not permit the reader to reach firm conclusions. According to the MA, no direct evaluations of the Operational Programmes are undertaken as the Strategic Plan does not required them but these are prepared indirectly through a system of Evaluations of Alert Indicators for lack of implementation of the Operational Programmes.

For the new programming period, the **introduction of an evaluation system accompanied by access to information sources and data cross-checking is fundamental i.e. the evaluation system should be compulsory**, in order to be able to analyse standard information for all Operational Programmes and therefore to compare the implemented interventions, and in order to learn from negative experiences and to make relevant policy decisions for improving measures.

## 10 ANNEXES

Table 7. Data on participants by policy field

	Increasing adaptability	Enhancing human capital	Access to Employment	Reinforcing social inclusion	Promoting partnerships	Share of women of total participants
Total number of participants	2,763,657	2,826,437	7,400,565	870,385	414	55%
Employed	68.0%	20.6%	12.6%	17.6%	45.7%	48%
of which self-employed	25.3%	5.1%	7.0%	3.4%	0.0%	43%
Unemployed	20.6%	15.5%	94.7%	77.1%	54.3%	59%
of which LTU	21.1%	9.8%	13.3%	27.7%	0.0%	53%
Inactive	11.4%	63.9%	4.4%	5.4%	0.0%	48%
of which in education/training	57.5%	70.0%	52.6%	40.9%	0.0%	46%
Young people (15-24 years)	15.7%	73.2%	23.7%	14.1%	67.9%	49%
Older people (55-64 years)	8.9%	5.2%	10.7%	5.1%	0.0%	47%
Migrants	4.4%	5.2%	19.9%	53.3%	82.4%	52%
Minorities	0.2%	0.8%	1.0%	3.5%	0.0%	55%
Disabled	0.7%	2.3%	5.5%	14.5%	0.0%	44%
Others	1.7%	2.4%	8.6%	19.3%	0.0%	51%
Primary or lower secondary education (ISDEC 1 and 2)	26.0%	29.0%	59.1%	59.0%	3.9%	51%
Upper secondary education (ISCED 3)	26.0%	52.5%	23.5%	19.8%	14.0%	53%
Post-secondary non tertiary education (ISCED 4)	10.5%	3.4%	3.5%	7.4%	20.5%	57%
Tertiary education (ISCED 5 and 6)	34.5%	14.0%	19.8%	7.2%	61.6%	62%

Source: SCF2007

Table 8 Overview of Country Specific Recommendations addressed to Spain

Year	Human Capital	ESF contribution	Access to Employment	ESF contribution	Social Inclusion	ESF contribution
<b>2004</b>	<p>CSR 1 making permanent contracts more attractive for employers and discouraging the use of fixed-term contracts so as to counter the segmentation of the labour market; increasing the attractiveness of temporary agency work for workers; removing obstacles to part-time work</p> <p>CSR 3 raising incentives for women to participate in the labour market by bringing down the cost of care facilities for children and other dependants</p> <p>CSR 4 improving active labour market measures for disadvantaged people, in particular young people, people with disabilities, immigrants and the long-term unemployed</p>	<p>✓</p> <p>✓</p>	<p>1) Making permanent contracts more attractive for employers and discouraging the use of fixed-term contracts so as to counter the segmentation of the labour market; [...]</p> <p>2) Raising incentives for women to participate in the labour market by bringing down the cost of care facilities for children and other dependants;</p> <p>3) Improving active labour market measures for disadvantaged people, in particular young people, people with disabilities, immigrants and the long-term unemployed;</p> <p>4) Completing the modernisation of the public employment services; strengthening the coordination between regional employment services; and removing remaining obstacles to geographical mobility.</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>Improve active labour market measures for disadvantaged people, in particular young people, people with disabilities, immigrants and the long-term unemployed</p>	<p>✓</p>
<b>2005</b>						
<b>2006</b>	<p>CSR 2 modernises employment protection, building on recent measures, including legislation to foster flexibility and security in the labour market; to counter segmentation and to increase the attractiveness of part-time work</p>					
<b>2007</b>	<p>CSR 3 continues its efforts to implement the new training model, which integrates occupational and</p>	<p>✓</p>			<p>Promote the integration of immigrants into the labour market</p>	<p>✓</p>

Year	Human Capital	ESF contribution	Access to Employment	ESF contribution	Social Inclusion	ESF contribution
	vocational training, to provide a better response to labour market needs; and ensure the effective implementation of education reforms, also at regional level, to reduce early school leaving					
<b>2008</b>	CSR 2 ensure the effective implementation of education reforms, also at regional level, to reduce early school leaving	✓			Promote the integration of immigrants into the labour market	✓
<b>2009</b>	<p>CSR 1 promote a swift transition into employment</p> <p>CSR 1 further encouraging mobility, upgrading skills and countering segmentation in the labour market</p> <p>CSR 2 ensure the effective implementation of education reforms, including at regional level, with the main objectives of reducing early school leaving and increasing the graduation rate in upper secondary education, and ensure that universities adapt to the Bologna process swiftly</p>	<p>✓</p> <p>✓</p>				
<b>2010</b>						
<b>2011</b>			6) Assess by the end of 2011 the impacts of the labour market reforms of September 2010 and of the reform of active labour market policies of February 2011 [...]	✓		
<b>2012</b>			2) Ensure that the retirement age is rising in line with life expectancy when regulating the sustainability factor foreseen in the recent	✓	Improve the employability of vulnerable groups and develop in parallel an effective child and family support services	✓

Year	Human Capital	ESF contribution	Access to Employment	ESF contribution	Social Inclusion	ESF contribution
			<p>pension reform and underpin the Global Employment Strategy for Older Workers [...]</p> <p>5) Implement the labour market reforms and take additional measures to increase the effectiveness of active labour market policies by improving their targeting, [...]</p> <p>6) Review spending priorities and reallocate funds to support access to finance for small and medium-sized enterprises (SMEs), research, innovation and young people. Implement the Youth Action Plan, [...]</p>	<p>✓</p> <p>✓</p>		
<b>2013</b>			<p>4) Finalise the evaluation of the 2012 labour market reform covering the full range of its objectives and measures by July 2013, and present amendments, [...]</p> <p>5) Implement and monitor closely the effectiveness of the measures to fight youth unemployment set out in the Youth Entrepreneurship and Employment Strategy 2013-2016, [...]</p>	<p>✓</p> <p>✓</p>	Improving the social protection policies effectiveness	

Table 9. Output indicators by policy field

Policy field	Number of OPs	Indicator	2007-2014
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Policy field	Number of OPs	Indicator	2007-2014
Adaptability	20	Number of people participating	1,461,910
Adaptability	20	Number of people participating	1,303,986
Adaptability	14	No. of people who participated to specific training courses related to environmental awareness	276,504
Adaptability	6	No. of people who participated to specific training courses related to environmental awareness	160,353
Adaptability	18	No. Of Businesses benefiting	455,353
Adaptability	1	No. of small and medium-sized enterprises participating	104
Adaptability	1	Agreements / conventions signed	1,046
Adaptability	5	No. of communication, dissemination and sensitization campaign	2,973
Adaptability	2	Networks, associations	185
Adaptability	2	Studies, evaluations	908
Adaptability	1	40 - Nº de personas participantes en acciones de formación continua (Desagregado por sexo).	28,811
Adaptability	1	40 - Nº de personas participantes en acciones de formación continua (Desagregado por sexo).	18,709
Human Capital	17	Number of people participating	1,464,173
Human Capital	17	Number of people participating	1,362,264
Human Capital	5	No. of people who participated to specific training courses related to environmental awareness	68,689
Human Capital	2	No. of individuals participating in specific environmental training	284
Human Capital	2	No. Of Businesses benefiting	3,350
Human Capital	2	No. of public entities or bodies benefiting	7,296
Human Capital	1	Agreements / conventions signed	2,680
Human Capital	6	Nº of communication, dissemination and sensitization campaign	1,558
Human Capital	2	Studies, evaluations	1,492
Human Capital	1	No. of training activities developed	10,255
Access to Employment	20	Number of people participating	2,954,152
Access to Employment	20	Number of people participating	4,446,413
Access to Employment	17	No. of people who participated to specific training courses related to environmental awareness	373,452
Access to	9	No. of people who participated to specific training courses related to environmental awareness	45,176



Policy field	Number of OPs	Indicator	2007-2014
Employment			
Access to Employment	14	No. Of Businesses benefiting	31,532
Access to Employment	2	No. of small and medium-sized enterprises participating	490
Access to Employment	2	Number of businesses of the tertiary sector participating	226
Access to Employment	3	No. of public entities or bodies benefiting	274
Access to Employment	4	Agreements / conventions signed	119
Access to Employment	6	No. of communication, dissemination and sensitization campaign	1,266
Access to Employment	4	Networks, associations	229
Access to Employment	6	Studies, evaluations	263
Access to Employment	1	41 - Nº de personas participantes en acciones de formación (Desagregado por sexo).	2,381
Access to Employment	1	41 - Nº de personas participantes en acciones de formación (Desagregado por sexo).	4,797
Access to Employment	3	Number of development projects	148
Access to Employment	1	50 - Nº de menores inmigrantes tutelados	6
Access to Employment	1	65 - Acciones de apoyo a la intermediación y la orientación laboral	16
Access to Employment	1	Number of labour oriented actions	1,377,817
Social Inclusion	1	Number of people participating	399,754
Social Inclusion	1	Number of people participating	470,680
Social Inclusion	1	No. of people who participated to specific training courses related to environmental awareness	68,144

<b>Policy field</b>	<b>Number of OPs</b>	<b>Indicator</b>	<b>2007-2014</b>
Social Inclusion	1	No. of people who participated to specific training courses related to environmental awareness	620
Social Inclusion	1	No. of businesses benefitting	49,426
Social Inclusion	1	No. of public entities or bodies benefitting	0
Social Inclusion	1	Agreements / conventions signed	3,946
Social Inclusion	1	No. of communication, dissemination and sensitization campaign	114,273
Social Inclusion	1	Networks, associations	240
Social Inclusion	1	Studies, evaluations	9,089
Promoting partnerships	1	Number of people participating	125
Promoting partnerships	1	Number of people participating	289
Promoting partnerships	1	Agreements / conventions signed	4
Promoting partnerships	7	Networks, associations	337
Promoting partnerships	2	Studies, evaluations	366

Source: SCF 2007

Table 10. Result indicators by policy field

Policy field	Number of OPs	Indicator	2007-2014	Final Target	Implementation rate	Result aggregation
Adaptability	9	No. of businesses created	30,697	22,127	138.7%	New businesses
Adaptability	8	No. of corporate projects set up as a direct result of support received	20,031	9,745	205.6%	
Adaptability	3	No. of corporate projects that have set up business plans/tools for those who have received support	16,266	17,684	92.0%	-
Adaptability	4	No. of businesses that have introduced prevention of labour risks schemes	13,136	18,678	70.3%	-
Adaptability	14	No. of people who have participated in continuous training activities and have maintained or improved their position of employment - M	512,100	513,050	99.8%	Employment
Adaptability		No. of people who have participated in continuous training activities and have maintained or improved their position of employment - W	411,054	431,788	95.2%	Employment
Adaptability	10	No. of participants with a short term or a freelance contract who finally get a long term contract – M	9,842	11,319	87.0%	Better employment
Adaptability		No. of participants with a short term or a freelance contract who finally get a long term contract - W	14,110	15,786	89.4%	Better employment
Adaptability	7	No. of businesses that have implemented management modernisation systems	6,984	9,012	77.5%	-
Adaptability	6	Number of people inserted in the labour market – M	4,409	5,070	87.0%	Employment
Adaptability		Number of people inserted in the labour market - W	7,233	8,090	89.4%	Employment
Adaptability	1	No. of businesses benefiting from specific restructuring services that have maintained their job posts	288	478	60.3%	-
Adaptability	4	No. of people who have increased their competitiveness and adaptability to the labour market and have improved their position or conditions of employment	40,284	41,433	97.2%	-
Adaptability		No. of people who have increased their competitiveness and adaptability to the labour market and have improved their position or conditions of employment	30,781	31,597	97.4%	-
Adaptability	14	No. of businesses set up by men	33,288	32,509	102.4%	-

Policy field	Number of OPs	Indicator	2007-2014	Final Target	Implementation rate	Result aggregation
Adaptability		No. of businesses set up by women	30,886	31,848	97.0%	-
Adaptability	3	Number of supported businesses that have survived	4,621	2,068	223.5%	-
A2E		number of unemployed people who have been beneficiaries of active measures of employability which agreed to a contract of employment – M	190,508	181,186	105.1%	Employment
A2E	19	number of unemployed people who have been beneficiaries of active measures of employability which agreed to a contract of employment - W	215,677	221,378	97.4%	Employment
A2E	3	number of enterprises created by men and women - M	10,467	5,941	176.2%	New businesses
A2E		number of enterprises created by men and women - W	7,550	4,259	177.3%	New businesses
A2E	12	number of companies that have implemented measures to fight against gender inequality in the workplace	3,877	5,148	75.3%	-
A2E		Number of persons benefitting from childcare facilities – M	13,402	9,654	138.8%	-
A2E	9	Number of persons benefitting from childcare facilities - W	19,429	11,884	163.5%	-
A2E		Nº of immigrants employed – M	31,681	517,419	6.1%	Employment
A2E	14	Nº of immigrants employed - W	43,657	382,006	11.4%	Employment
A2E	1	number of participants who have a job 180 days after the intervention - M	901,369	1,577,065	57.2%	Sustainable employment
A2E		number of participants who have a job 180 days after the intervention - W	1,369,299	1,315,626	104.1%	Sustainable employment
Human Capital	6	No. Of New degrees and professional qualifications	1,819	9,090	20.0%	-
Human Capital	6	Number of people who have obtained official recognition of the qualifications acquired through work experience – M	36,859	58,509	63.0%	-
Human Capital		Number of people who have obtained official recognition of the qualifications acquired through work experience - W	60,728	56,849	106.8%	-
Human Capital	3	Nº of unemployed people who have benefited from innovation and knowledge society training and have gained a work contract – M	22,284	40,471	55.1%	Employment
Human Capital		Nº of unemployed people who have benefited from innovation and knowledge society training and have gained a work contract - W	30,440	33,317	91.4%	Employment

Policy field	Number of OPs	Indicator	2007-2014	Final Target	Implementation rate	Result aggregation
Human Capital	14	No. of pupils who have participated in extra help, guidance and support activities who have remained in and/or completed compulsory secondary education – M	358,911	345,525	103.9%	-
Human Capital		No. of pupils who have participated in extra help, guidance and support activities who have remained in and/or completed compulsory secondary education - W	340,996	391,102	87.2%	-
Human Capital	7	No. Of networks or collaboration projects created with businesses, universities and research centres	1,711	1,643	104.1%	-
Human Capital	14	No. Of researchers or people of the university staff employed by businesses M	5,916	5,607	105.5%	-
Human Capital		No. Of researchers or people of the university staff employed by businesses W	3,751	10,443	35.9%	-
Human Capital	1	No. of persons engaged in an internship in a company, M	20,894	25,553	81.8%	-
Human Capital		No. of persons engaged in an internship in a company, W	21,721	26,440	82.2%	-
Human Capital	1	No. of training hours received at businesses	14,581,999	19,867,880	73.4%	-
Human Capital	1	Nº of people who have increased their competitiveness and adaptability to the labour market and have improved their position or conditions of employment M	2,281	3,138	72.7%	-
Human Capital		Nº of people who have increased their competitiveness and adaptability to the labour market and have improved their position or conditions of employment W	2,289	3,148	72.7%	-
Social Inclusion	16	number of persons with a disability hired – M	33,615	33,464	100.5%	Employment
Social Inclusion		number of persons with a disability hired - W	25,533	25,055	101.9%	Employment
Social Inclusion	19	number of people at risk of exclusion employed – M	71,527	52,837	135.4%	Employment
Social Inclusion		number of people at risk of exclusion employed - W	73,249	52,555	139.4%	Employment

Source: SCF 2007

Table 11. Inventory of evaluations

Title of evaluation	Author	Type of evaluation	Date	Scope
Informe de la evaluación estratégica temática sobre inmigración, FSE 2007-2013	MA	Effect	2011	Immigrants/A2E
Evaluation report on the research incentives: scholarships and call for project proposals in the framework of the ESF OP 2007-2013. Castilla-La Mancha	MA	Effect	2011	Human capital
2013 Operational Evaluation ESF OP Fight Against Discrimination	MA	Process/effect	2013	Social Inclusion
Informe de evaluación Estratégica Temática de Igualdad de oportunidades entre Hombres y Mujeres	MA	Effect	2010	Gender
Study on the relevance and effectiveness of the network model co-funded by the ESF and the results of the participation in them in the current programming period 2007-2013	MA	Effect		Partnerships

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