

EU FUNDS FOR SOCIAL SERVICES: TECHNICAL GUIDANCE ON EFFECTIVE INTERVENTIONS

2024

SOCIAL SERVICES HELPDESK PROJECT



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List of Acronyms

CFR EU	Charter of Fundamental Rights of the European Union
CPR	Common Provisions Regulation
ECEC	Early Childhood Education and Care
EEG	European Expert Group
EPSR	European Pillar of Social Rights
EaSI	European Programme for Employment and Social Innovation
ERDF	European Regional Development Fund
ESF	European Social Fund
ESF+	European Social Fund Plus
EU	European Union
FEAD	Fund for European Aid to the most Deprived
MAs	Managing Authorities
MS	Member States
MFF	Multiannual Financial Framework
NDP	National Development Program
NEGF	National Evidence Gathering Fora
NGOs	Non-Governmental Organisations
NEET	Not in Education, Employment or Training
OP	Operational Programme
OPs	Operational Programmes
SMEs	Small and Medium Enterprises
SCOs	Standardised Cost Options
WISEs	Work Integration Social Enterprises
YEI	Youth Employment Initiative

1. Introduction

The endorsement of the European Pillar of Social Rights (EPSR) in 2017 marked a crucial step toward fostering upward convergence among Member States (MS). It prioritises fair and well-functioning labour markets, social protection systems and inclusive societies, positioning them as cornerstones for the advancement of a more Social Europe. Building on the EPSR Action Plan of 2021, a broad range of (often sub-sector) specific initiatives were launched (see also Figure 8).

Effectively implementing the EPSR requires a holistic approach aligned with the principles of a person-centred service model, cooperation and complementarities between diverse interventions and institutions, and an emphasis on providing quality services, supported by adequate funding, and driven by innovative design and implementation to harness the transformative power of social interventions. Social services support millions of people in various stages in life, such as children, the elderly, persons with disabilities, people at risk or experiencing poverty and social exclusion, homeless people, migrants and asylum seekers and other vulnerable groups. They offer care, support, guidance, education and training services, also with the aim to empower the people needing them.

The European Social Fund + (ESF+) and the European Regional Development Fund (ERDF) can be used in a range of fields for social services (see also Figure 5): for providing childcare and helping children in need/at the risk of poverty, for supporting young people to find a qualification or job, for upskilling and reskilling initiatives supportive of the transition to green and digital economies, for providing inclusive and qualitative education and vocational training programmes in line with the needs of the users, for delivering support and care services for persons with disabilities or elderly persons, for the socio-economic integration of homeless persons, migrants, refugees, asylum seekers and/or third country nationals, for equal access to health care and/or for access to financing for social economy organisations.

In particular with the start of the current programming period, the ESF+ is designed to support the piloting and/or scaling up of new models of social service organisation, delivery and financing (see also Figure 7). They do this by using concepts and approaches such as supported employment, supported decision making, independent living, reasonable accommodation, co-production of services also to realise social innovation. Many of those concepts and approaches – including user-orientated, person-centered and community based social services – are used in the field of care and support for persons with disabilities, others in the field of care and support of older persons, others in the field of labour market inclusion of disadvantaged or marginalised persons whereas Housing First is relevant for the field of homelessness/affordable housing/social housing.

The ESF+ and the ERDF, alongside national financial support programmes, can be utilised not only to back the testing and expansion of innovative models for the organisation, the delivery, and the financing of social services but also to align with concepts and approaches in relation to the social services workforce, the quality of services, the digitalisation of social services as well as the greening of infrastructures (see also Figure 6).

The European Union (EU) Funds play a pivotal role in supporting the mission of social services by providing financial resources and strategic guidance to Member States (MS). Through initiatives such as the ESF+ and the ERDF, EU Funds contribute to the development and implementation of effective interventions that bolster social inclusion, economic opportunity, and sustainable development. By leveraging EU Funds, social services can enhance their capacity to deliver impactful solutions and address pressing social challenges facing communities across the EU.

In line with the mission statements and visions of consortium partners of the Helpdesk Project, an increasing number of social services providers:

1. Are reunited around the commitment to fighting the injustices which lead to poverty and the exclusion of people in the most marginalised and disadvantaged situations from society and/or the labour market.
2. Champion a world where no one is excluded and left behind and where everyone can flourish and participate meaningfully in society.
3. Work towards societies which guarantee social justice for all people and social mixing.
4. Engage for just and transformative social change across Europe.
5. Aim at delivering high-quality, accessible, affordable and user-centred services running in an accountable, efficient, and effective way.
6. Aim at organising their services in a way that they are person-centred, respect diversity and enable people to enjoy their dignity and human rights on an equal basis, beyond disability or any other factor which might lead to impairments, restrictions or discriminations.

The Technical Guidance on Effective Interventions in Social Services offers a comprehensive toolkit for Managing Authorities (MAs) and social service providers to optimise the utilisation of ESF+ and ERDF resources. This guidance brings together all insights from a rigorous research and consultation endeavour undertaken by the Social Services Helpdesk Project, employing a variety of research methods to explore pertinent questions and challenges within the realm of social service funding and delivery.

This document provides an overview of key components and insights aimed at optimising the impact and efficiency of interventions in the realm of social services. Beginning with an exploration of the Social Services Helpdesk Project and the contextual framework of ESF+ and ERDF, the guidance delves into practical challenges and needs faced by MAs and Social Services in effectively leveraging EU funds. By addressing cross-sectoral aspects and fostering social innovation, the guidance aims to facilitate informed decision-making and strategic planning within the social services sector. Furthermore, an assessment of sub-sectoral needs and challenges offers targeted insights into areas such as childcare, disabilities, support and care of older persons, homelessness, and work integration. Through a checklist of considerations and practical steps for MAs and Social Services, accompanied by policy recommendations, this guidance provides a roadmap for enhancing the delivery and impact of social services across the EU landscape. Ultimately, the document concludes with reflections on the importance of collaborative efforts and strategic approaches in advancing social inclusion, cohesion, and well-being within European societies.

2. The Social Services Helpdesk Project

In this Technical Guidance we are not elaborating all the project context. For all relevant information on the Social Services Helpdesk Project please have a look at the project webpage.

3. ESF+ and ERDF Contextual Framework

3.1 ESF+ (2021-2027)

Mission

The ESF+ is the main EU funding instrument for supporting jobs, social inclusion, education and training. The 2021-2027 ESF+ programming period helps MS to tackle the socio-economic consequences of the Covid-19 outbreak, foster a skilled and resilient workforce that is ready for the transition to a green and digital economy, and achieve high employment levels and fair social protection. The ESF+ finances the implementation of the 20 principles of the EPSR through actions in the areas of employment, education, skills and social inclusion. Thus, ESF+ contributes to Member States' efforts to reduce unemployment, advance quality and equal opportunities in education and training and improve social inclusion and integration. It can also play a key role in enhancing the availability, access, affordability, quality, and user orientation of social services.

Action

The majority of funding under the ESF+ is allocated under shared management with the Member States. This means that the ESF+ MAs in each country dedicate the funding to projects that are run by a range of public and private non-for-profit organisations, thereby responding to country- and region-specific needs. In 2021-2027, across the 27 EU MS, €98.7 billion are available to MS and local authorities.

The specific objectives of the ESF+ include¹:



Figure 1 - ESF+ Objectives

¹ Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021, *Establishing the European Social Fund Plus (ESF+) and repealing Regulation (EU), No 1296/2013*

What is new?

The ESF+ brings together four funding instruments that were separate in the programming period 2014-2020: the European Social Fund (ESF), the Fund for European Aid to the most Deprived (FEAD), the Youth Employment Initiative (YEI) and the European Programme for Employment and Social Innovation (EaSI).

Moreover, for the programming period 2021 to 2027, new features are present, in particular:



Figure 2 - What is new in the ESF+ MFF 2021-2027?

3.2 ERDF (2021-2027)

Mission

The ERDF aims to strengthen economic, social and territorial cohesion in the European Union by correcting imbalances between its regions. In 2021-2027 it will enable investments in a smarter, greener, more connected, and more social Europe that is closer to its citizens (as detailed below).

Action

In 2021-2027, the fund will enable investments to make Europe and its regions²:

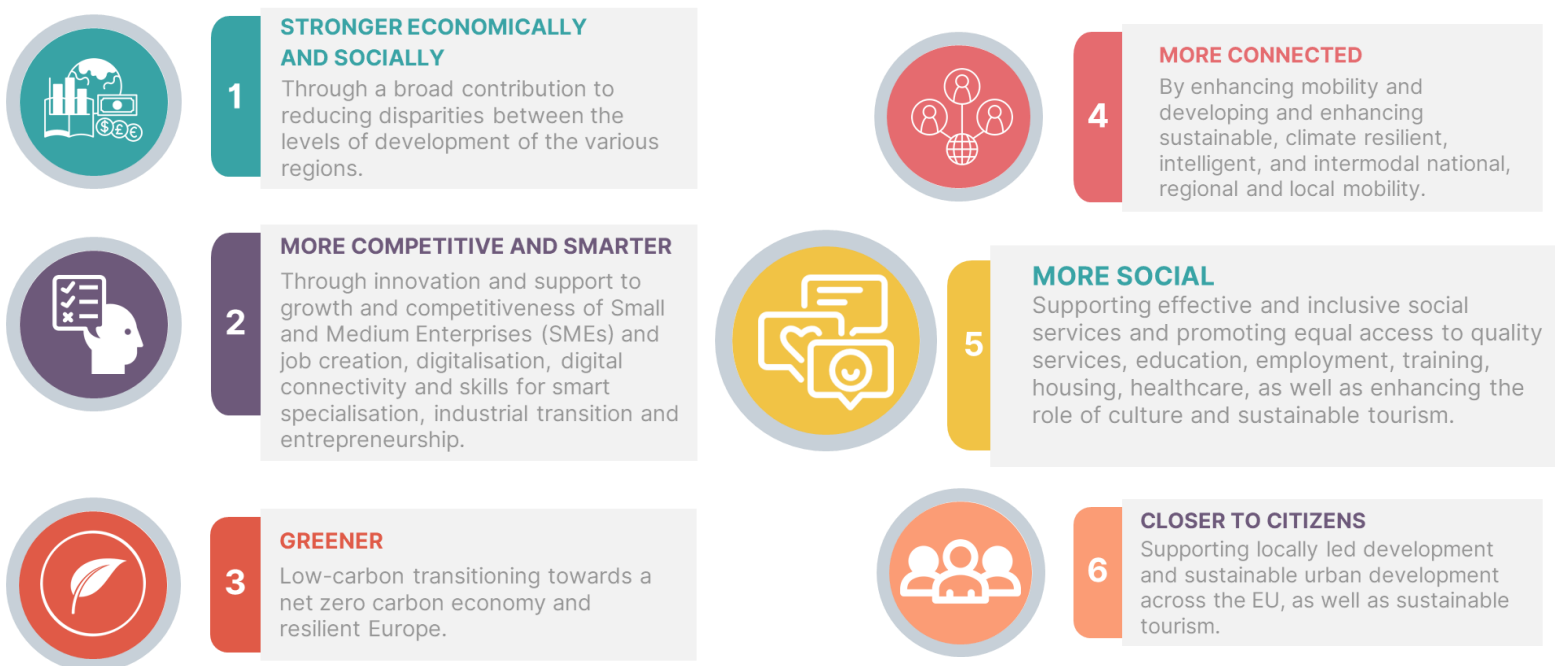


Figure 3 - ERDF Objectives

What is new?

Compared to the previous Multiannual Financial Framework (MFF), new features are present in the current programming period:

² Regulation (EU) 2021/1058 of the European Parliament and of the Council of 24 June 2021 on the European Regional Development Fund and on the Cohesion Fund - European Commission, No 231/60

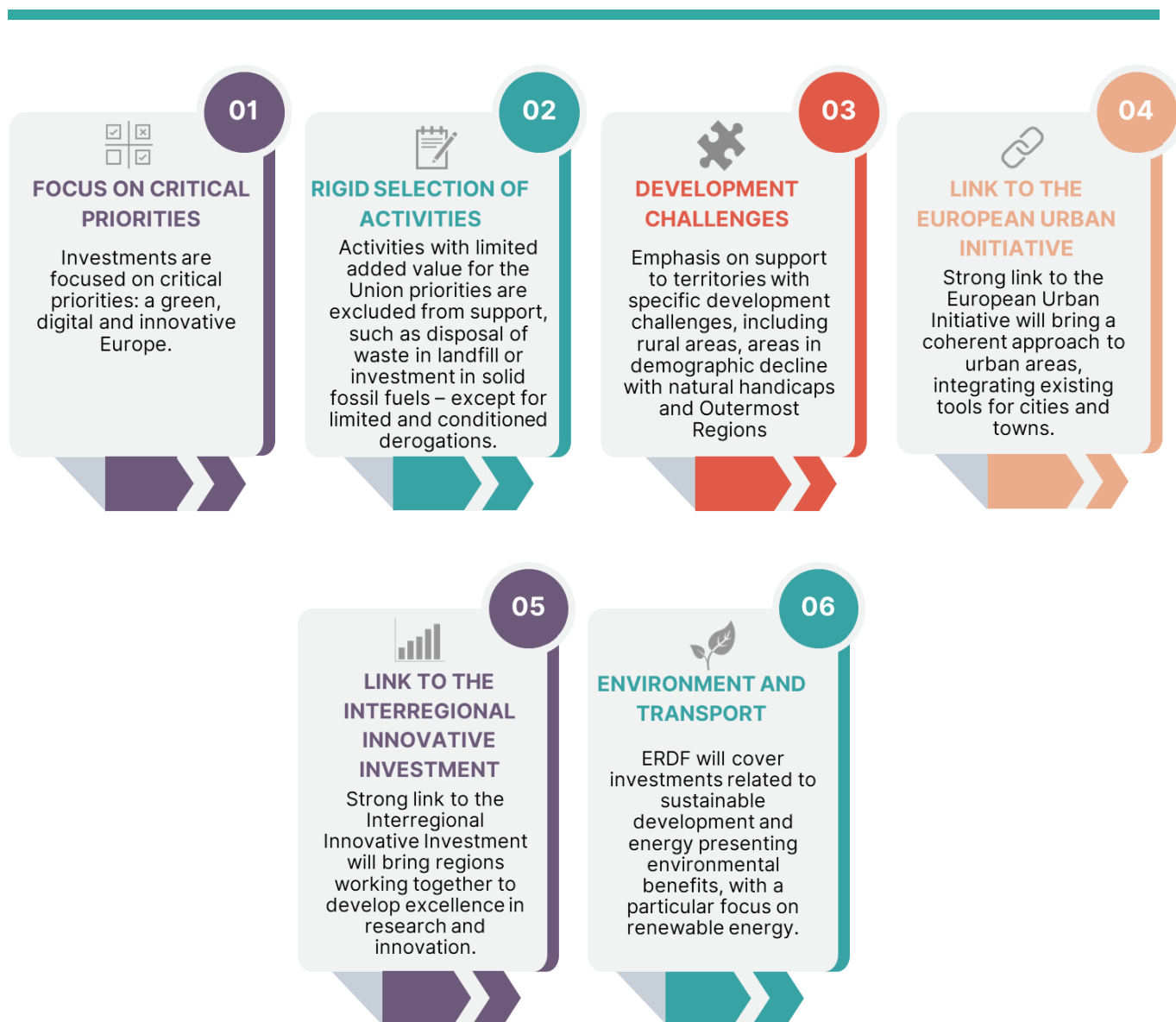


Figure 4 - What is new in the ERDF MFF 2021-2027?

3.3 What role can social services play in the implementation of ESF+ and ERDF?

The endorsement of the EPSR in 2017 marked a crucial step toward fostering upward convergence among Member States. This initiative prioritises fair and well-functioning labour markets and social protection systems, positioning them as cornerstones for the advancement of a more social Europe. Recognising the evolving needs of users as central to this endeavour, it becomes imperative to place social services at the forefront of its implementation stage.

Effectively implementing the EPSR requires a holistic approach aligned with the principles of a person-centred service model. This approach increases cooperation and complementarities between diverse

interventions, fostering an environment where different types of services seamlessly collaborate to fulfil the goals of the EPSR. To achieve this, there is a crucial emphasis on providing quality services, supported by adequate funding, and driven by innovative design and implementation to harness the transformative power of social interventions³.

Despite the recognised importance of innovative approaches in meeting evolving social service needs, a notable challenge persists in the form of a lack of regional and national funding, particularly in the realm of innovation. This emphasises the critical role of robust financial support in driving successful implementation and underscores the necessity of addressing gaps in funding to facilitate the advancement of innovative social services strategies.

The MFF for 2021-2027 sets the stage for a more united, stronger, and democratic European Union in alignment with the EPSR, the EPSR Action Plan, the Charter of Fundamental Rights of the European Union, and other key social policy initiatives. In response to the identified funding challenges, the European Commission has revamped the longstanding ESF, a key funding instrument for investing in people and creating quality employment opportunities across Europe for over six decades. Alongside the ESF+, the ERDF emerges as a resolute supporter of initiatives (see also sub-chapter 4.5) that aim to strengthen economic, social and territorial cohesion in the European Union, promoting, among all the priorities, infrastructure investment, accessibility and social inclusion⁴.

The upgraded MFF positions inclusive and quality services in education, training, and lifelong learning at the forefront⁵, contributing significantly to building resilience for distance and online learning⁶.

As we delve into the complex landscape of social services, it becomes increasingly evident that a strategic integration of ESF+ and ERDF can significantly amplify the impact of interventions, particularly in addressing evolving user needs and bridging funding gaps for innovative approaches. The following figure serves as a visual narrative, explaining the symbiotic relationship between social services and the desirable combined strength of ESF+ and ERDF. It also highlights the transformative potential of these funds in advancing social welfare and community development.

³ Social Services Europe (2018), *Towards the Implementation of the European Pillar of Social Rights the Role of Social Services*

⁴ European Commission, *European Regional Development Fund (ERDF)* (https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/european-regional-development-fund-erdf_en)

⁵ Official Journal of the European Union, L231, Vol. 64, 20 June 2021

⁶ Regulation (EU) 2021/1058 of the European Parliament and of the Council of 24 June 2021 on the European Regional Development Fund and on the Cohesion Fund, No 231/60

Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021, *Establishing the European Social Fund Plus (ESF+) and repealing Regulation (EU), No 1296/2013*

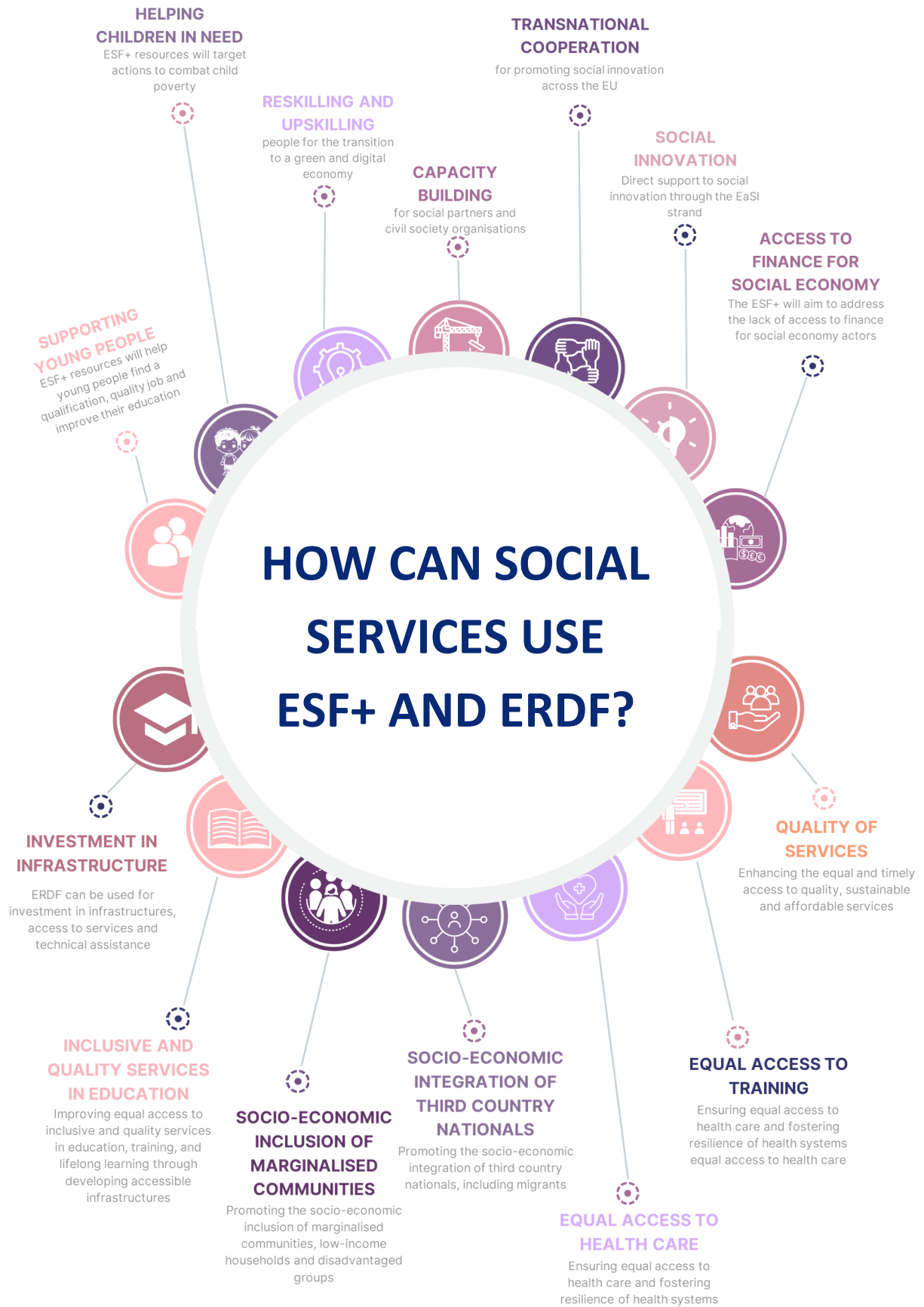


Figure 5 - How can Social Services use ESF+ and ERDF?

4. Use of EU Funds for Social Services - Challenges and Needs

4.1 Introduction

This chapter draws together the threads of our research, weaving a tapestry that not only reveals the collective challenges and aspirations of those at the forefront of social service provision and management but also introduces effective interventions and promising practices. Highlighting the intricacies of working within policy frameworks, the chapter explores possibilities for enhancing the effectiveness of ESF+ and ERDF utilisation on a cross-sectoral basis, i.e., covering all fields or sub-sectors of social services (i.e., the five dealt with in more detail by Technical Guidance, but also others, such as migrants, asylum seekers and refugees). By understanding the unique needs, challenges, and opportunities within this landscape, Social Services and MAs can be better equipped to navigate the complexities of EU funds, incorporating successful interventions to advance social services throughout the European Union.

4.2 Methodology

Following the conceptual framework of the Social Services Helpdesk Project, a mix of research methods to explore the questions relevant for this Technical Guidance was applied.

1. **Desk Research on Existing Knowledge:** [Country Profile Sheets](#) were created for each EU MS, with a focus on ERDF and ESF+ funds. These sheets provide an overview of funding priorities, amounts, and managing bodies for social services, helping to understand EU fund structures and management at the national level.
2. **Survey on Helpdesk Needs:** The survey run in the second half of 2022 collected information on the needs, challenges, and opportunities of social services in accessing and using ESF+ and ERDF funds. It aimed to identify essential requirements for the sector's development. Two online surveys were conducted, targeting Managing Authorities and Social Services in all 27 EU MS.
3. **National Evidence Gathering Fora (NEGF):** They were organised as half- to one-day events involving participants from public and third-sector social service providers, coordinators, and EU funding representatives. The NEGF contributed to gathering diverse knowledge on various topics, including planning, coordination, and provision of social services, as well as EU funding structures at different administrative levels. The NEGF enabled to confirm or refute the major trends emerging from the surveys, and to obtain more qualitative details on the findings expressed.
4. **Review of Existing Literature:** Existing literature was collected by all project partners and reviewed to further investigate gaps in the EU funding system related to Social Services and MAs' activities. This literature served as a basis for research and complemented data collected through surveys and NEGF.

-
5. **3 Cross-Sectoral and 10 Sectoral Workshops:** 3 cross-sectoral workshops were organised to elaborate guidance on how to maximise the social impact of ESF+ & ERDF. These workshops focused on solutions which would work for social services across the various sub-sectors (see Chapter 6) as well as on the application of general principles for effective service provision. On the other hand, 10 thematic workshops focusing on effective interventions for 5 different sectors of social services (childcare, disability, support and care of older persons, homelessness, work integration) have been organised. The events targeted both MAs and Social Services.

4.3 Practical challenges for Managing Authorities and Social Service Providers as to the use of EU funds for effective interventions

This section outlines the main obstacles and challenges that MAs and Social Services are currently facing when dealing with and managing EU funds (particularly ESF+ and ERDF).

Social Services



Effective Intervention – Potential Solution

Introducing a compensation mechanism (exempt national co-financing from the deficit rules for social infrastructure).

This intervention involves implementing a compensation mechanism that grants an exemption from the deficit rules for social infrastructure projects. In many cases, government budgets are subject to deficit limits or rules designed to maintain fiscal discipline. These rules applying to the €-zone restrict the amount a government can borrow or spend beyond its revenues. However, social infrastructure projects, such as those related to healthcare, education, or housing, often require substantial investments that may exceed these deficit limits.

To address this challenge, the proposed mechanism suggests allowing governments to exclude the national co-financing portion of social infrastructure projects from deficit calculations. National co-financing refers to the portion of project funding provided by the national government, often in partnership with regional or local authorities, while other funding sources like grants or loans cover the rest.

Creating a guarantee system

Another potential solution could also be the creation of a guarantee system implemented by the EU or the creation of a special fund dedicated to EU project holders facing the lack of cash flow.

Generalisation of pre-financing

Another solution could be the generalisation of pre-financing which will be paid just after the signature of the grant agreement. For long-term projects, it could also go through the implementation of intermediate financing which can be granted at the mid-term of the project. A prefinancing system is already implemented by EU programmes such as the [Erasmus+ programme](#) or the [Creative Europe programme in France](#).



Distribution of Funding and Targets

The funds are not equally allocated among all the sub-sectors of social services and all the specific target groups. Evidence underlines how there are still challenges with reaching and addressing the needs of some groups, particularly the most disadvantaged ones, which sometimes leads to 'creaming', i.e., targeting less vulnerable people with less complex needs to achieve better results. Unrealistic targets are often set, leading to a shift towards simpler activities and target groups, which is unfortunate.

Effective Intervention – Potential Solution

Implementing an in-depth needs assessment going beyond demographic criteria.

This intervention involves conducting comprehensive research and implementing pilot projects to enhance the understanding and planning of specific services beyond demographic criteria. Typically, when governments plan services like healthcare, education, or social welfare, they often rely on demographic data, such as population size, age, and gender. However, this proposed intervention suggests going beyond demographics by considering additional criteria to better align services with the actual needs of communities. People from disadvantaged or marginalised groups often face a multitude of social issues and require an integrated package of services based on a “one-stop-shop” principle. These services are best provided by Work Integration Social Enterprises (WISEs) and Social Services. These organisations should be actively involved in local efforts to combat poverty and social exclusion. There must be an active partnership between social services, WISEs, public authorities, educational institutions, Non-Governmental Organisations (NGOs) and the business community.

Implement cascade funding

It consists of allowing a project holder, which benefits from EU funds, to implement its own call for proposals. Other project holders will then respond to the call for proposals and can benefit from EU funds for smaller amounts and a simpler procedure.

Best Practice 1

FORWORK (2016) is a pilot project aiming at the labour market integration of asylum-seekers and refugees hosted in reception centres in Italy, in view of informing a future possible policy reform at national level; planned at the time of the EaSI call. The team used Eurostat and national and regional statistics to define the precise context and scope of migration in Italy and its specific needs not faced in other EU countries.

Best Practice 2

INSPIRE (2014) developed a multidimensional and comprehensive assessment process of the situation of people in disadvantaged or marginalised situations accessing the Social Care Services in Rome. To start with, the team organised group meetings with the representatives of the beneficiaries and the family associations, complemented by an analysis of the needs through the social record.



Measuring and Aligning Social Project Indicators

The indicators are sometimes difficult to measure, observe and achieve. The goals, results and indicators set out in some projects have proven to be too demanding or inadequate, and they are not aligned with the actual social action. Project indicators can be redundant and often do not reflect the specificity of target groups as well as all the different social situations and challenges.

Effective Intervention – Potential Solution

Focus on qualitative and harmonised indicators.

A shift toward a results-oriented approach should be implemented, emphasising the achievement of outcomes rather than just outputs. It seeks to establish a stronger intervention logic and a more extensive set of indicators to track progress effectively. This intervention calls for the enforcement of a uniform impact assessment methodology. This ensures that MAs employ a consistent approach when evaluating the impact of funded projects. It is also advisable to harmonise the existing indicators. This simplifies the monitoring process and reduces administrative burden, making it easier to focus on meaningful indicators. Having said that, the value-based approach should not be forgotten.



Staff Shortages and Project Literacy

The lack of specialised staff and/or insufficient financial capabilities to hire professionals is particularly evident among Social Services. The financial resources to pay project managers when developing project applications are also limited.

Effective Intervention – Potential Solution

Training and up-skilling

This challenge recognises the critical need for improving "project literacy" within organisations that provide social services. It addresses the skills gaps among employees, which currently hinder the effective implementation of projects. To overcome this obstacle, a potential intervention could focus on establishing sustainable human resource management practices and organisational structures that prioritise ongoing training and up-skilling of staff involved in projects, spanning from the design phase to project reporting.

Promote pre-conceived exemplary projects

It consists of project models and templates that are already formulated and available online for potential project applicants. Social services that do not have sufficient resources and knowledge to use these models for designing and drafting their own project proposals. It represents a simplified way for project holders to get their project awarded with grants. It also allows funding authorities to have simplified / standardised evaluation processes.



Consultation Mechanism and Co-Design

The dialogue mechanisms that exist are often ineffective, especially at the design and formulation stage of Operational Programmes (OPs) and calls for applications. The identification of the needs that should be addressed by the calls for proposals – along with other research and data analysis mechanisms - should come from the stakeholders and users' perspectives as well. For example, from the social/affordable housing and homelessness sector, are not invited in the planning/programming phase.

Effective Intervention – Potential Solution

Foster stakeholders and users' collaboration and co-design

Reach out to stakeholders and users well in advance of drafting operational programmes. By involving stakeholders early in the process, their insights and needs can be integrated into programme design, enhancing relevance and effectiveness. Implementing a co-design approach can be a key solution. Moreover,

an additional intervention consists of actively promoting and facilitating discussion tables, forums, and events that encourage meaningful dialogue among MAs, social services providers, and the community interested in applying for projects. These gatherings provide opportunities for feedback, idea sharing, and alignment of objectives. Finally, the organisation of Communities of Practice at both regional and national levels could represent an effective way to share common challenges and come up with common insights.

Best Practice

[I-CCC](#) (2019) conducted a community needs assessment using a user-centred approach with citizens and regional stakeholders' participation through interviews and focus groups in the six pilot regions.



Comply with Public Procurement and State Aid Rules

Social service providers have also emphasised the difficulty to comply with the complex rules on public procurement and/or state aid – an issue (although the assumed difficulties can later be less important or even be unjustified) that might deter them from elaborating and submitting project proposals. Furthermore, complex administrative procedures represent a significant barrier for social services providers in accessing EU Funds.



Communication

A frequently reported challenge is a lack of personal contact between the project manager and the governing body. Flexible professional communication is needed. In addition, it can happen that the funder does not meet the project promoter in person or does not get a sufficient understanding of the work whereas it would be crucial to understand the full context



Sustainability

The lack of long-term funding represents a great obstacle for the sustainability of projects. Calls for proposals are focused and adjusted to short-term operations and interventions without a clear sustainability perspective, while the nature of the social services sector is to support vulnerable groups during a longer time to get results.



Involvement of small Social Services

There is a growing concern that large consultancies and universities are increasingly dominating the development and implementation of projects related to social services, with little or no input from Social Services. This approach can create a disconnect between the needs of end-users, and the services provided, which may not adequately address their needs.

Effective Intervention – Potential Solution

Make EU programmes more accessible through micro-projects (or small-scale grants)

The micro-project is a mechanism that is already proposed by various EU funding programmes such as the [INTERREG France-Wallonie-Vlaanderen programme](#). There are the main features of a micro-project:

- The maximum grant provided by the EU funds is lower for a micro-project than for a regular project.
- It allows a financing rate of up to 100% of the total eligible costs.
- It is implemented within a shorter period of time than a regular project.
- Micro-projects are less demanding than regular projects in terms of management, tracking and implementation.



Availability of time for project design

Some calls for proposals ask for a consortium as appraisal criteria for applying. Often the strict deadline of the call does not give to the applicants enough time to design the project proposal and build up a consortium.



Difficulties to implement an integrated service approach

A recurrent feature was the difficulty to set up project implementing an integrated service approach. One reason are non-linked planning processes at the different line ministries at national level. Moreover, social service providers/beneficiaries often cannot deal with such a “holistic approach”.

Project preparation phase would need to be financially supported and given sufficient time to build up partnerships, e.g., with the Public Employment Services to combine actions on social inclusion and labour market integration of marginalised groups/disadvantaged persons.

Managing Authorities



Awareness of the Needs

One of the key challenges which Managing Authorities face is that they would need to improve their knowledge about specific needs in local communities, including in the field of social services. This can lead to an underuse of the available funding mechanisms or specific financial requirements.

01



Identifying the Needs

Typically, there is no standardised way to identify and document needs at national and regional levels. Also, many EU countries lack established methods to effectively communicate local social care requirements to the central level.

02

Effective Intervention – Potential Solution

Implementing a standardised mechanism for identifying the needs

Develop and implement a standardised needs assessment process that can be consistently applied at both the national and regional levels. This process should involve data collection, analysis, and validation to identify social care needs accurately. Create a centralised reporting mechanism that allows local communities and regions to communicate their social care needs to the central government or relevant authorities. This may involve the use of digital platforms, reporting forms, or designated liaison officers. Offer training programs and capacity-building initiatives to local authorities and social care providers to enhance their ability to identify, document, and report social care needs effectively. To further enhance the effectiveness of the proposed initiatives, it is crucial to involve organizations that represent the users in the development and implementation of the standardised needs assessment process. By collaborating with such organisations, which have a deep understanding of the lived experiences and perspectives of the individuals receiving social care, the assessment process can become more inclusive and reflective of the diverse needs within communities.



Design of Indicators

Continuously encountering challenges in establishing quantifiable indicators for measuring social impact underscores the prevailing issue of non-standardised management requirements across various competences and jurisdictions.

03



Shortage of Specialised Staff

MAs often highlight the significant lack of specialized staff who have the expertise to navigate the complexities of EU funds and their regulations. This shortage poses a big challenge for ensuring effective programme implementation and compliance.

04

Effective Intervention – Potential Solution

Investing on trainings

MAs and Local Authorities should invest more on internal training programmes for their staff. This training will be useful to give to the staff the adequate knowledge of the specific fields/sectors they operate in to be able to have the adequate competences for the management and evaluation of projects or funding.



NGOs Involvement

A common challenge of MAs is represented by the difficulty to promote EU funds to the NGOs and encourage them to apply for calls for proposal. Factors such as limited capacity, the insufficient financial means, and lack of staff, overly detailed calls that target just specific topics, have led to a lack of enthusiasm and commitment of NGOs, particularly in smaller regions.

05

Effective Intervention – Potential Solution

Strengthening NGO Engagement through an enhanced communication strategy

Develop and implement an improved communication and dissemination system that ensures that NGOs receive timely and relevant information about EU funding opportunities, programme planning, and their potential roles. Organise regular events, workshops, and exchange platforms that bring together NGOs, social service providers, municipalities, and relevant stakeholders. These gatherings facilitate networking, knowledge sharing, and discussions on opportunities and challenges. Streamline administrative procedures and documentation requirements to minimise the burden on NGOs, making it more attractive for them to engage in the funding application process.

Implement the “open” call for proposals

Implement calls for proposals which set the main targets that project holders must reach. However, an “open” call for proposals has no predefined topics and is opened up for proposals from any field. This solution encourages the innovation and the creativity of project holders and in parallel bring about less constraints for them. Moreover, this method breaks down any kind of barrier linked to the availability of funds under certain needs.

Best Practice

In 2022, the ESF Transnational Cooperation Platform published a [toolkit](#) for Scaling-Up Social Innovation. The document also includes a step-by-step guide on how to initiate a dialogue with potential beneficiaries. The toolkit identifies several stages that local authorities and MAs should follow to engage with potential beneficiaries and outlines various useful resources that can facilitate their work.



Institutional Capacity

MAs grapple with a complex interplay between institutional capacity and regulatory requirements, significantly influencing programme effectiveness. Notably, certain countries, particularly those in less-developed regions, encounter persistent constraints related to their operational capacity. The most prominent impediment to effectiveness lies in the form of insufficient administrative capacity. The cumulative burden of actual and perceived administrative complexities, which can sometimes be exacerbated by rules and requirements imposed by national governments or public authorities within EU Member States, has led to project delays and cost inefficiencies.

06



Balancing Relevance and Effectiveness

One more notable challenge is related to the monitoring system, which can inadvertently encourage beneficiaries to engage in 'creaming' practices and set targets at levels that may be too conservative. While this approach can result in higher measured effectiveness, it can also diminish the overall relevance of the outcomes achieved.

07



Funds Flexibility

Difficulty to react to new challenges due to the pre-defined target groups, actions, and amounts specified in the regulatory framework governing EU funds. This lack of flexibility hinders MAs' ability to effectively address emerging issues such as increased energy and cost-of-living costs. The rigid structure of the regulatory framework restricts their capacity to adapt projects and redirect the cash flow as needed.

08

Effective Intervention – Potential Solution

Establishing a resilience mechanism with a buffer function

Establish a dedicated Resilience Fund that operates alongside existing EU funds, specifically designed to address unforeseen challenges and crises. Develop a crisis-responsive mechanism within the Resilience Fund that allows MAs to access funding quickly when faced with unexpected challenges, such as energy price hikes or cost-of-living increases.



Internal Communication Barriers

MAs encounter difficulties in ensuring smooth and effective communication of information and decisions from the EU level to the national level. Additionally, there are challenges in transmitting this information from the national (ministerial) level to the regional level.

09



Standardised Cost Options

MAs confront the challenge of striking a balance between standardising cost options and tailoring them to meet the specific requirements of individual beneficiaries

10

Effective Intervention – Potential Solution

Toolkit on EU Budget and SCOs

The Helpdesk Project has created a [toolkit to Facilitate and Manage EU Funds](#). A specific section is dedicated to the Project Budget. This tool provides recommendations to MAs on Standardised Cost Options (SCOs) based on feedback from social sector beneficiaries.



Coordination among departments

Rising difficulties in coordinating different actions and priorities among departments. Sometimes the offices that manage different funds do not have contacts and this results in discrepancies in actions to be developed (i.e., costs that for some departments are not acceptable but for other departments are).

11



Territorialisation of funding

The territorialization of EU Funds is usually insufficient. Most of EU Funds are absorbed by regions which tend to use them for their own projects or for big project holders. This situation leads to a lack of funds dedicated to smaller project holders. This leads to the risk of concentration of funds in bigger regions and that they are not channelled from MA to IB and from regional level to the local level.

12

Effective Intervention – Potential Solution

Reinforcing the territorialisation of European Funds managing system

This proposition consists of multiplying the local relays of the MAs in the local territories and to provide those relays with EU funds. Then, the local relays – which are more aware of the specific interests of their territories – will implement their own call for proposals according to their own needs. This system already exists, notably through the Intermediate Bodies of ESF+ in France, which implement their own call for proposals on behalf of

the French state. However, the territorialisation of EU Funds remains insufficient leading to the lack of funds dedicated to smaller project holders.



Implementation of the bottom-up approach

When preparing projects linked to EU-level policy frameworks (such as the European Care Strategy or the European Child Guarantee), it is difficult for the MA and the social service providers/beneficiaries to organise a bottom-up approach as the eligible actions are as a rule planned by the line ministries at national level

13



Politicisation of funding

While drafting and implementing OPs, MAs have to follow the national and European strategies. Thereafter, they should focus on specific priorities that sometimes are determined by political agendas resulting in shortage of funds for sectors that are considered as "less relevant". This leads to inequalities of funding in terms of topics.

14



Insufficient capacity for synergies of funds

The research done in the context of the project confirmed a lack of know-how on how to best use existing synergies and complementarities of funding from different EU funds, e.g., combining money from the ESF+ and the ERDF on the digitalisation or the greening of social services.

15

Effective Intervention – Potential Solution

Focus on integrated approaches and transfer of experiences

A stronger focus (already included in the OPs) on an integrated approach to social service delivery is needed, e.g., in the field of homelessness linking housing, health and employment and training services.

Moreover, organising a transfer of experiences on the innovative use of EU funds from one group to other can be impactful. E.g., from programmes for the support and social and labour market integration of Roma to homeless persons or asylum seekers.

4.4 Practical needs of Managing Authorities and Social Services Providers as to the use of EU funds for effective interventions

This section outlines the main needs that MAs and SPs are currently expressing while dealing with and managing EU funds (particularly ESF+ and ERDF). An in-depth analysis was done for five countries: Belgium, the Czech Republic, Italy, Spain, and Sweden. Further evidence is also reported as the data collected within the activities of the Helpdesk Project covers all the 27 MS.

The results of the analysis are highly relevant for the assessment of the current situation around the approach to the ESF+ and ERDF.

Social Services

MAs

DATA ACCESS

Social Services require more timely access to data, e.g. number of people that need the access to services. Which is essential for generating robust evidence regarding the outcomes and impacts of interventions funded by ESF+ and ERDF. The absence of complete or delayed data, a common issue, hinders the ability to conduct thorough cost-effectiveness analyses.

MAs require a more adaptable approach to justify decisions with official data, aligning them with the unique needs of individuals supported by ESF-funded projects during the planning of OPs and projects. The utilisation of data is of paramount importance to exert influence over strategic decisions.



TARGET GROUPS & NEEDS

Social Services need standardised approaches for defining target groups during the planning stage, while striking a balance between relevance and effectiveness. It remains evident that ESF operations face challenges in consistently reaching and addressing the specific needs of certain target groups, particularly those who are most disadvantaged.

The alignment of operations with the needs of the target group need not occur exclusively during the operational programme stage. Some operational programmes have found flexibility by initially adopting a broad definition of target groups during the planning phase, which can then be refined and narrowed down during the implementation phase.



PARTNERSHIP & COOPERATION

Cross-sectoral partnerships, which tackle the various root causes of social exclusion and discrimination, can facilitate the holistic progression of vulnerable groups towards social inclusion. Furthermore, the establishment of more inclusive partnerships and the adoption of comprehensive outreach strategies hold the potential to render projects more relevant and boost the efficacy of participant recruitment efforts.

Enhanced collaboration between European Commission Directorates-General (DGs) at the EU level and ministries and agencies at the national level is essential to maximise the effectiveness of ESF+ and ERDF support delivery.



FOSTER COMMUNICATION

MAs need to enhance their communication strategies to make OPs and grant opportunities more accessible and comprehensible to a broad range of stakeholders. This includes engagement with representatives from key sectors such as health, education, and social services, along with active involvement of representatives from disadvantaged groups.

MAs recognise the imperative to invest in efforts aimed at engaging new beneficiaries. Particular attention and intensified efforts should be directed toward small and local organisations. Initiatives related to awareness-raising and capacity-building play a pivotal role in fostering the utilization of EU funds to support social inclusion, especially among these smaller, community-based entities.



SIMPLIFICATION

Social Services express the need to simplify the rules, which are perceived as excessively rigid, complex, and convoluted, resulting in a substantial administrative burden related to documenting project expenses. Moreover, there's a significant need for more support from the funder, which is crucial for successful application processes.

MAs recognise the pressing need to streamline and implement simplified procedures. The complexity of existing administrative processes often poses a significant challenge. To enhance efficiency and effectiveness, MAs seek the incorporation of more straightforward and streamlined mechanisms, like SCOs, to simplify project management and reduce administrative burdens.



MONITORING MECHANISMS

Improvements in measuring the effectiveness of ESF+ and ERDF programmes are essential. There is a need for monitoring mechanisms that can more comprehensively capture and measure programme performance.

MAs recognise the need to address the issue simplifying reporting and the need to have qualitative indicators. To facilitate more comprehensive evaluations in the future, there is a strong desire to standardise soft outcomes and long-term results to a greater extent.



EU POLICIES

Social Services express the need to go beyond EU and National policies for identifying the needs on the ground. The policy framework are essential to visualise the big picture, but a thorough assessment of the needs on the ground is needed.

There is a strong emphasis on the importance of intensive coordination between EU policies, national regulatory frameworks, and the programming process to enhance the effectiveness of interventions in supporting the resilience and functions of Social Services. This also highlights the necessity of empowering Managing Authorities with the flexibility to adjust their priorities in response to the evolving needs and challenges within local areas.



CAPACITY BUILDING

Social Services express the need for a contribution towards capacity building through funds available in sectoral and regional programmes. Moreover, it is underlined how the role of social partners, umbrella organisations and civil society organisations can be relevant for this end.

Institutional capacity, at all levels of implementation, and regulatory requirements, are linked and strongly influence effectiveness. More capacity-building could be provided for Mas staff, key national/regional education and training stakeholders and beneficiaries to ensure that management and social impact measurement of funds is effective and efficient, leading to improved delivery.



DISSEMINATION OF RESULTS

There is a pressing need for more effective dissemination of project results and outcomes. Ensuring that the valuable insights and achievements from social service projects are widely shared and communicated to relevant stakeholders and the broader community is essential. This will not only facilitate knowledge sharing but also enhance the impact and visibility of initiatives.

Need for an improved dissemination of project results and the development of a more efficient outreach strategy. It is essential to ensure that the valuable outcomes and lessons learned from funded programmes and funding opportunities as well are effectively communicated to a wider audience, including stakeholders, beneficiaries, and the general public.



FLEXIBILITY

Social Services recognise the need for greater flexibility in the implementation of projects and programmes. Flexibility is crucial to adapt and respond effectively to the evolving needs of vulnerable populations and changing societal dynamics. This includes the ability to adjust project strategies, resource allocation, and timelines as necessary to achieve the best outcomes. On the other hand, while flexibility is necessary, certain points have to remain fixed, e.g. the rules applied by MAs during the writing phases.

Need for increased flexibility in the allocation of funds, allowing MAs to access more “unallocated” resources for responding effectively to unforeseen crises and emerging needs. This enhanced flexibility would empower MAs to swiftly address pressing issues and allocate resources where they are most urgently required, ensuring a more agile and responsive approach to crisis management.

4.5 Horizontal/Cross-Sectoral Aspects

What are the key cross-sectoral needs in the field of social services?

EU funds, such as ESF+ and ERDF, along with other EU funds and national financial support programmes, can be utilised not only to back the testing and expansion of innovative models for organising, delivering, and financing social services but also to align with concepts and approaches outlined below (Figure 6). These are pertinent to specific sub-sectors⁷ of social services. They are also available to develop, test and roll out challenges common to all sub-sectors, even though their relative importance might differ from sub-sector to sub-sector. Based on existing research and on the information collected via different channels in the context of the Social Services Helpdesk Project, we list below the most relevant cross-sectoral needs:

⁷ In the context of social services, "sub-sectors" refer to specific categories or divisions within the broader field of social services. These categories can be based on different criteria, such as the type of service provided, the target population, or the specific area of focus. For example, within the broader sector of social services, sub-sectors could include personal social services, healthcare services, education services, housing assistance, employment support, and more. Each sub-sector deals with a particular aspect or domain of social services, and funding or initiatives may be tailored to address the unique needs and challenges of each sub-sector.

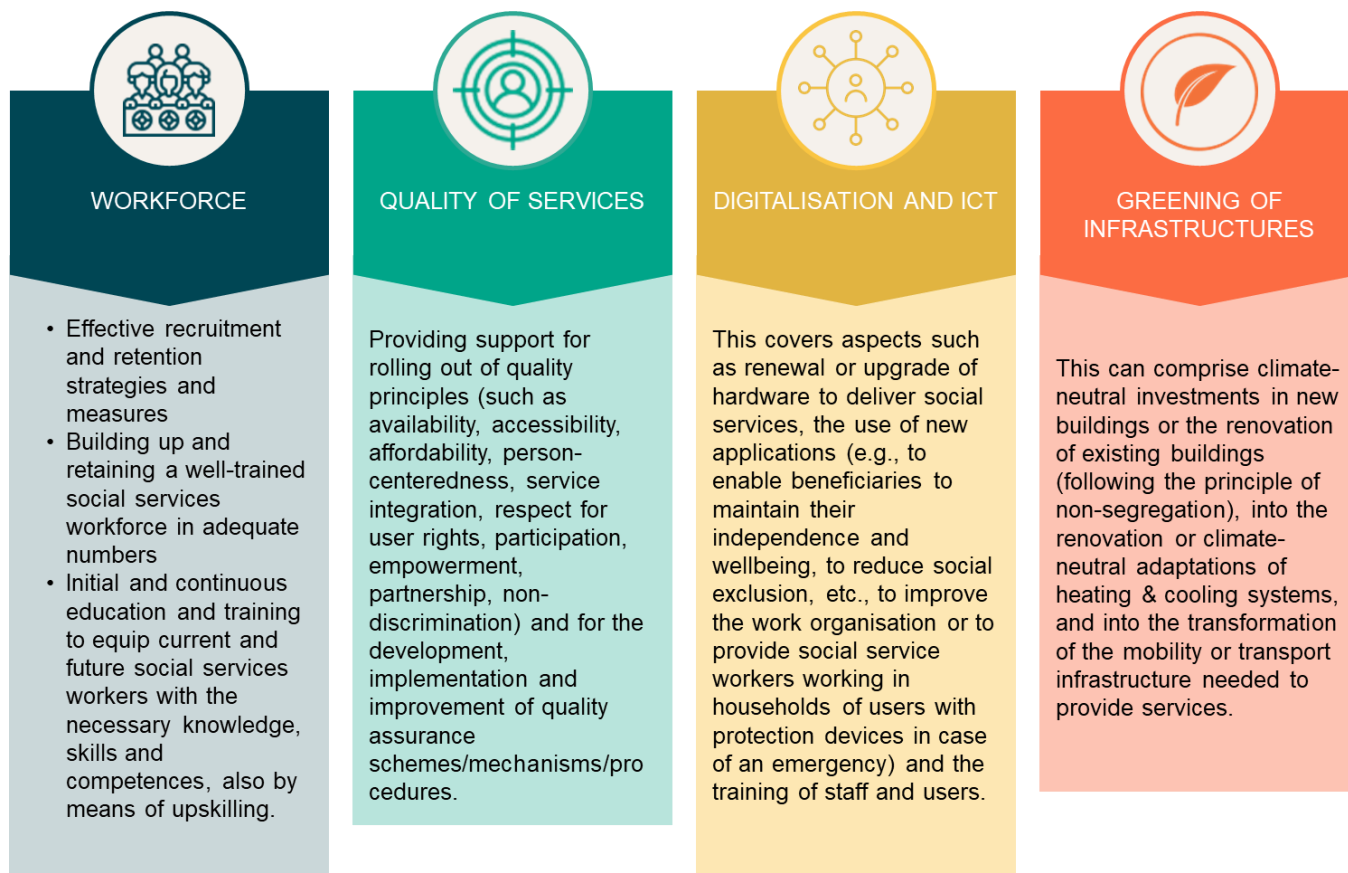


Figure 6 – Key Cross-Sectoral Needs in Social Services

Exploring Concepts for Efficient Organisation, Delivery, and Financing Models in Social Services

EU funds, including the ESF+ and ERDF, are designed to support the piloting and/or scaling up of new models of social service organisation, delivery and financing which reflect concepts and approaches as the ones listed below, to realise social innovation (see chapter 5) across the EU MS and to provide evidence underpinning policy and regulatory reforms. We list below those concepts or approaches identified as most relevant by the Social Services Helpdesk Project. Many of them are used in the field of care and support for persons with disabilities, others in the field of care and support of older persons, others in the field of labour market inclusion of disadvantaged or marginalised persons and the last bullet point in the field of homelessness/affordable housing/social housing:



Figure 7 – Relevant concepts, rights, principles or approaches for effective models of service organisation.

What are the relevant EU-level policy frameworks for social services?

Considering the social services sub-sectors on which the Social Services Helpdesk Project focuses, but also the broader social services sector (covering, e.g., also issues such as affordable housing, social housing, migration, refugees and asylum seekers or mental health) and the social economy ecosystem, the list below reflects those EU-level policy frameworks which shape the related EU-level policies and the use of the ESF+ and ERDF.

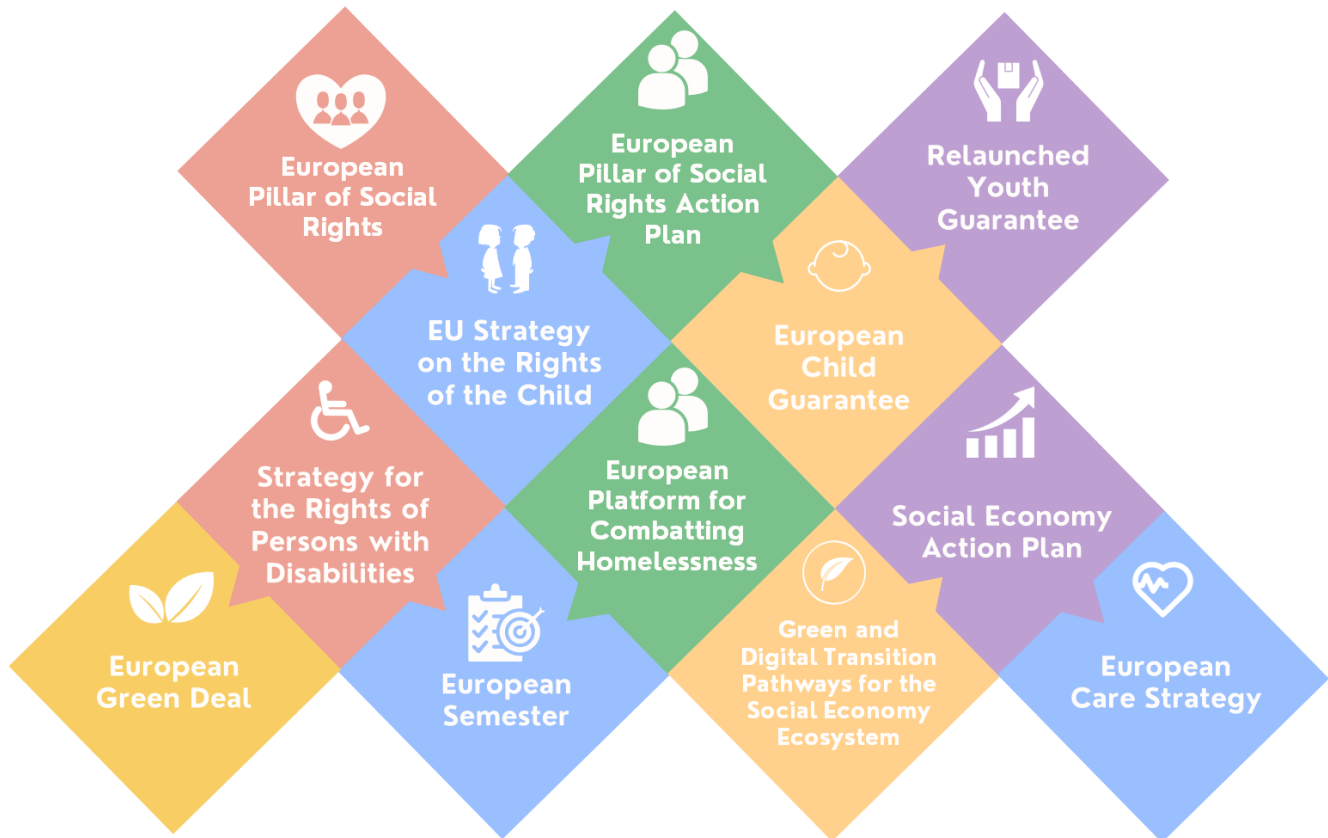


Figure 8 - EU Level Relevant Policy Frameworks for Social Services.

These policy frameworks⁸ either contain and/or promote general principles spelled out in the European Pillar of Social Rights – such as “education, training and lifelong learning” (1.), “active support to employment” (4.), “childcare and support to children (11.), “social protection” (12.), “old age and pensions” (15.), “inclusion of persons with disabilities” (17.), “long-term care” (18.) or “housing and assistance for the homeless” (19.).

⁸ Apart from the policy frameworks listed above, it is worth noticing that there are other frameworks relevant for the use of EU funds in specific sub-sectors of social services, including ESF+ and ERDF, which should be taken into account. The project partners identified five different “instruments”: 1) thematic initiatives or procedures being part of broader policy strategies, e.g., the “Disability Employment Package” as part of the Strategy for the Rights of Persons with Disabilities 2021-2030 (“Union of Equality”) or the “European Employment Strategy” as part of the European Semester; 2) EU-wide Action Plans, such as the “Action Plan for the Inclusion of Third-Country Nationals”; 3) EU-wide strategic partnerships, such as the “European Innovation Partnership in Active and Healthy Ageing” or the “Transition pathway on proximity and social economy” setting out 7 action areas – and thus investment areas partly relevant also for social service providers – for the green and the digital transition in the context of the Social Economy Action Plan; 4) initiatives implemented by using the ESF+, such as ALMA (Aim, Learn, Master, Achieve) to improve the chances of young people aged 18-29 who are not in employment, education or training and are disadvantaged as to their chances of accessing work or training for individual or structural reasons; and 5) multi-stakeholder information and communication hubs such as “Active and Healthy Living in the Digital World”. Moreover, the frameworks listed above and in the text should be in line with the Fundamental Rights Charter.

Or they call on the EU MS, different levels of government, competent public bodies and the social service providers to make use of new models of social service organisation, delivery and financing as those concepts and approaches listed in the figure above, not least by means of the use of ESF+ and ERDF.

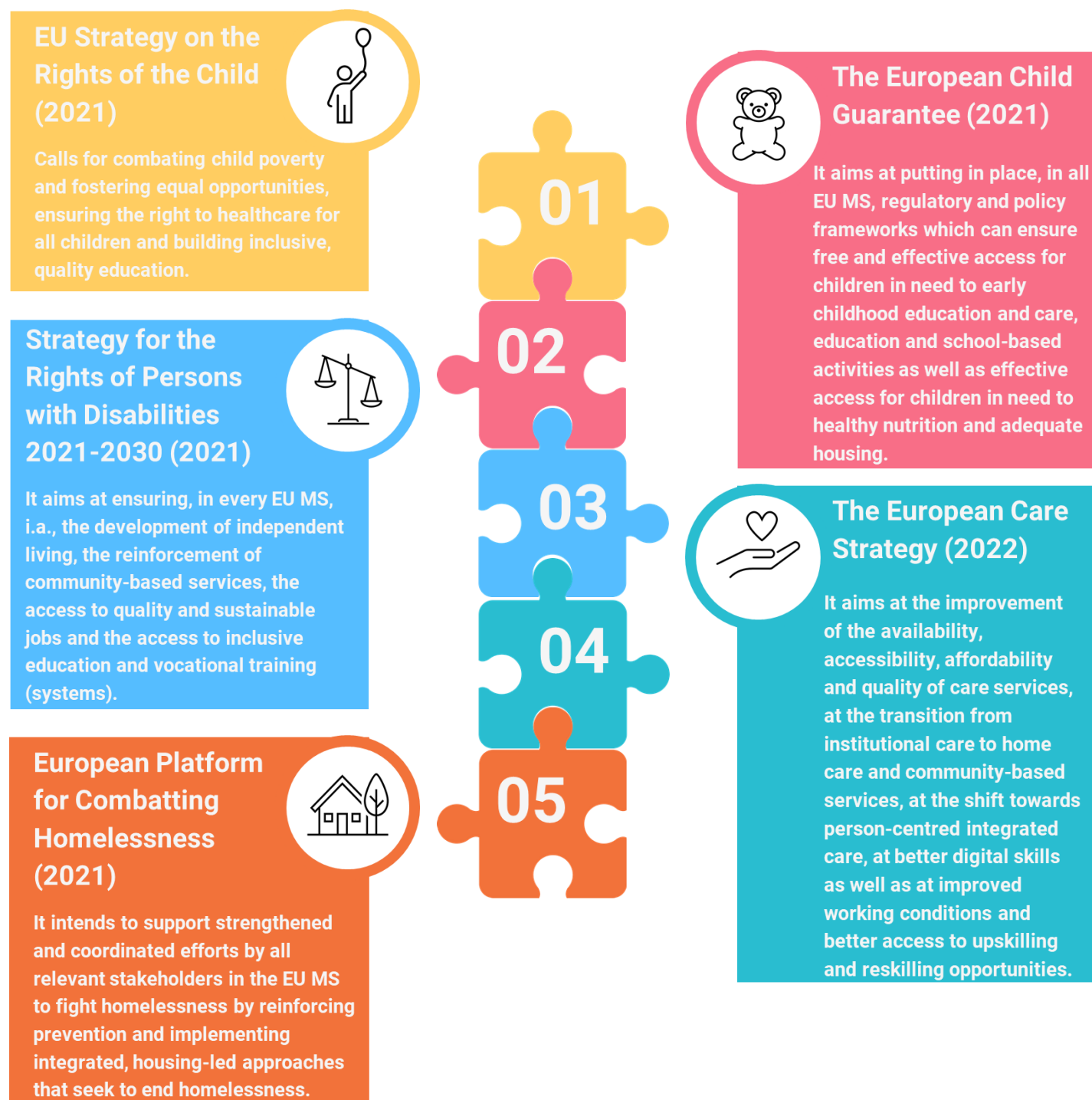


Figure 9 – Overview Policy Frameworks.

5. How to foster Social Innovation with ESF+ and ERDF

What is Social Innovation?

As defined in Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021 establishing the European Social Fund Plus (ESF+) and repealing Regulation (EU) No 1296/2013, “social innovation” means an activity, that is social both as to its ends and its means and in particular an activity which relates to the development and implementation of new ideas concerning products, services, practices and models, that simultaneously meets social needs and creates new social relationships or collaborations between public, civil society or private organisations, thereby benefiting society and boosting its capacity to act. Social innovation is often driven by the social economy.

Moreover, as defined by the EASPD Report “[The Concept of Social Innovation in the Disability Field](#)”, social innovation refers to the design and implementation of new solutions to pressing social demands that imply conceptual, process, product, or organisational change, which affect the process of social interactions and ultimately aim to improve the welfare and wellbeing of individuals and communities and to enhance individuals’ capacity to act.

Taking up common elements of definitions for social innovation as provided by the EC (see above) and as presented in the [EASPD Report “The Concept of Social Innovation in the Disability Field”](#), it is possible, for the purpose of this Technical Guidance, highlight the following key features:

- 1) Development and implementation of new ideas concerning products, services, practices, and models, which simultaneously meet social needs and create new social relationships or collaborations between public, civil society and private organisations.
- 2) The new solutions and responses to societal needs and challenges have to benefit the society and to boost its capacity to act effectively and in a resource-efficient manner.
- 3) In the field of social services, policy measures, programmes and projects should a) improve the welfare and wellbeing of individuals and communities, b) improve the social inclusion of those needing social care, support, guidance as well as training, c) be driven by the concrete social needs and d) support the participation, empowerment and autonomy of the service users.

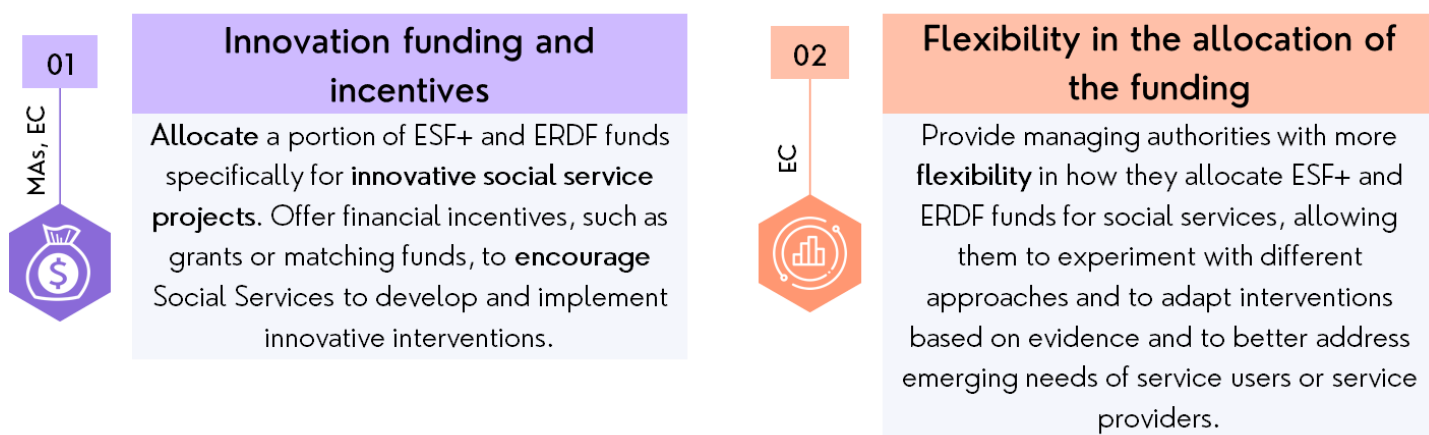
In line with the mission statements and visions of consortium partners of the Social Services Helpdesk Project, the social services providers from the not-for-profit/social economy sector⁹:

⁹ Taken from the mission statements and visions of Caritas Europa, CEDAG, EASPD and Eurodiaconia.

- 1) Are reunited around the commitment to fighting the injustices which lead to poverty and the exclusion of people in the most marginalised and disadvantaged situations from society and/or the labour market.
- 2) Champion a world where no one is excluded and left behind and where everyone can flourish and participate meaningfully in society.
- 3) Work towards societies which guarantee social justice for all people, social mixing.
- 4) Engage for just and transformative social change across Europe.
- 5) Aim at delivering high-quality, accessible, affordable and user-centred services running in an accountable, efficient, and effective way.
- 6) Aim at organising their services in a way that they are person-centred, respect diversity and enable people to enjoy their dignity and human rights on an equal basis, beyond disability or any other factor which might lead to impairments, restrictions or discriminations.

In order to realise social innovation by means of EU funding, in particularly by using the ESF+ in line with the conditionalities set, the following motto could serve as guideline for MAs and Social Services in order to guide their thinking and acting from the perspective of users of social services: “We all want to live in the place we call home, with the people and things we love, in communities where we look out for each other, doing the things that matter to us.”¹⁰

Successful innovation in the design, forms of provision and funding of social services and the support of adopting evidence-based promising practice also by using ESF+ and ERDF funds can be achieved through various strategies and mechanisms. We list below some ways to achieve this:



¹⁰ Social Care future, *Social Care Future Motto* (<https://socialcarefuture.org.uk>)

03

MAS



Engaging relevant stakeholders

Involve beneficiaries, service users, and local communities in the design and evaluation of innovative interventions as their insights and feedback can inform more effective and relevant solutions.

04

MAS



Research and evaluation support

Offer technical assistance and funding to support research and the evaluation of innovative social service interventions. Emphasise the importance of evidence-based decision-making and the use of data to inform policy development.

05

EC



Capacity building

Offer capacity-building programmes and training opportunities to equip MAs and Social Services with the skills and knowledge needed to embrace and implement innovative practices and social service designs.

06

EC, MAS



Promoting learning networks

Facilitate the formation of learning networks and communities of practice among MAs, NGOs, research institutions, and service providers. Encourage knowledge sharing, collaboration, and the exchange of innovative ideas and promising practices.

07

MAS



Innovation partnerships

Foster the partnership with research institutions, social economy organisations, including social enterprises, and private enterprises to co-create and implement innovative social service solutions.

08

MAS



Adaptive management approach

Promote an adaptive management approach where MAs continuously learn from the outcomes of interventions in the field of social services and adjust strategies and the service design, accordingly, based on evidence.

09

MAS, SocS



Technology integration

Explore opportunities, also by using ESF+ and ERDF funds, to leverage technology (including, e.g., the use of digital platforms, data analytics, and artificial intelligence to enhance service delivery and decision-making processes) in order to drive innovation in social services.

10

MAS



Demonstration projects

Support demonstration projects that showcase innovative social service interventions. These projects can serve as models for others to replicate and to scale up pilot project to inspire further innovation within the sector.

11

MAS



Innovation competitions

Organise innovation competitions focused on social services. Invite organisations and stakeholders to submit their **innovative project proposals**, and reward winners with funding or other forms of support.

12

MAS



Recognition and visibility

Recognise and celebrate successful innovative initiatives in social services. Showcase their impact and raise awareness among stakeholders, motivating others to adopt the same or similar evidence-based approaches.

6. Assessment of sub-sectoral needs and challenges

6.1 Introduction

In addition to challenges and needs which are faced by the social services sector as a whole (as described in chapter 4), some challenges and needs are specific to the type of service and target group and/or to the sub-sector of social services. In this chapter, we dive deeper into five pivotal areas of social services: for persons with disabilities; elderly; homelessness; work integration; and child protection and families in poverty. These five “sub-sectors” of social services have been identified by the Helpdesk project as areas where the employment of ESF+ and ERDF funds can play a pivotal role in shaping the quality, availability, and accessibility of services, and thereby meet EU policy objectives in the area of social inclusion.

Through rigorous research, data collection, and engagements with stakeholders across Europe¹¹, the multifaceted challenges that these sectors face are unveiled, as well as the unmet needs that demand strategic interventions. The chapter also explores the successful interventions and promising practices that have emerged in view of accessing the ESF+ or the ERDF, offering guidance and inspiration to SPs, MAs, policymakers, and practitioners.

6.2 Childcare and Child Poverty

Relevance of the ESF+ and ERDF for the sector

¹¹ The Sectoral Policy workshops and NEGF of the Helpdesk project – as already explained before - aimed to produce evidence and collect inputs from the various stakeholders.

To ensure that actions meet the rules and priorities set out in the EU funding regulations, this section summarises the main provisions related to child protection and families in poverty, as set out in the ESF+, ERDF and CPR regulations.

The Common Provisions Regulation (CPR) is an over-arching legislation that applies to various EU funding programmes, including ESF+ and ERDF. It outlines rules that must be followed and sets objectives for using these funds. The key provisions of the Common Provisions Regulations which address children in need are the horizontal and thematic enabling conditions. The horizontal conditions ensure adherence to European and international law, such as:

- compliance with the CFR EU in the implementation of the Funds;
- respecting the obligations set out in the United Nations Convention on the Rights of the Child;

The thematic enabling conditions prioritise the fight against poverty and social exclusion, which is further enhanced by the Council Recommendation on the European Child Guarantee¹² adopted in June 2021. The fight against child and family poverty can benefit from the ESF+ and the ERDF in various ways.

The ESF+ regulation aims to allocate funding to tackle poverty and the social exclusion of children. ESF+ priority areas include helping children in need by allocating resources to targeted actions aimed at combating child poverty. The following aspects of the regulation are particularly relevant¹³:

- At least 25% of the ESF+ resources at national level should be spent to combat poverty and social exclusion, out of which Member States most affected by child poverty should invest at least 5% in measures combating child poverty. All others should equally allocate appropriate amounts to implement the forthcoming Child Guarantee. In addition, all Member States will need to dedicate at least 3% of their ESF+ share to fight material deprivation¹⁴.
- The ESF+ should contribute to eradicating poverty by supporting national schemes to alleviate food and material deprivation and promote social integration of people at risk of poverty or social exclusion and the most deprived persons. With the overall aim that, at Union level, a minimum of 4 % of the resources of the ESF+ strand under shared management support the most deprived persons. In this regard, Member States should allocate at least 3 % of their resources of the ESF+ strand under shared management to address the forms of extreme poverty with the greatest social exclusion impact, such as homelessness, child poverty and food deprivation.

¹² Council Recommendation (EU) 2021/1004 establishing a European Child Guarantee, L. 233 ([Council Recommendation \(EU\) 2021/1004 establishing a European Child Guarantee – European Sources Online](#))

¹³ European Commission (2022). *Supporting early childhood development and care: the role of the European Social Fund Plus (ESF+)* (<https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8495&furtherPubs=yes>)

¹⁴ These MS include: BG, HR, CY, GR/EL, HU, IE, IT, LT, LU, RO, and ES.

-
- The requirement to promote equal access to and completion of quality and inclusive education and training, including early childhood education and care.
 - The specific objective of active inclusion requires Member States to have national strategies in place against poverty and social exclusion if they are to qualify for funding under the ESF+.

The **European Regional Development Fund** aims to strengthen economic, social and territorial cohesion within the EU. ERDF enables investments regarding employment, education, skills, social inclusion and equal access to healthcare. Under the objective of Social Inclusion, some relevant priorities are: developing social infrastructure; improving access to inclusive and quality services in education through developing accessible infrastructure; and promoting socioeconomic inclusion of disadvantaged groups through integrated measures including housing and social services. One of the ERDF specific objectives is to increase “the socioeconomic integration of marginalised communities, migrants and disadvantaged groups, through integrated measures including housing and social services”. This shall be done through a national strategic policy framework for social inclusion and poverty reduction. Moreover, measures for the shift from institutional to community-based care prioritising community-based care services are envisaged.

A combination of ESF+ and ERDF investments is recommended for the development of early childhood education and care services, whereby ERDF is for example used for accessible infrastructure, and ESF+ for the piloting of a service.

Needs and challenges of the sector

The sector is facing various challenges and obstacles, where the (improved) use of ESF+ and ERDF could have a positive impact.

Key needs and challenges that were identified during the Helpdesk evidence-gathering activities and workshops, in relation to the use of EU and domestic funds, are:



Lack of resources for the sustainability of projects. For instance, the halt of major projects could impede the development and expansion of childcare facilities and services such as nurseries or after-school care facilities. As a consequence, limited availability of childcare spaces may affect families, especially those in rural or underserved areas, where the need for accessible and quality childcare is crucial.

01



There is significant regional inequality in funding support for early childhood education and care, which affects both access and quality within childcare facilities. Since funding for childcare services often relies on funding from local municipalities, the quality of childcare provision can strongly depend on children's place of residence. Stronger financial support measures at national level to equalise funding for childcare across regions could be an important policy measure in this context. Specifically, policy should explicitly seek to channel funding for childcare services towards regions and rural areas with comparatively lower financial means.

02



Funding opportunities often provide an inadequate coverage of children with an ethnic and migrant background including Roma community groups¹⁵ (with limited access to early childhood education and care due to residence status restrictions), as well as insufficient support for other disadvantaged children, especially in rural areas.

03



A clear national framework for data collection and specific indicators for vulnerable children is needed to be able to set adequate priorities in programming. Monitoring and evaluation must use clear, multi-sectoral, and comparable metrics, ensuring the best interest of the child. Furthermore, there is a lack of mechanisms and coordination with intermediary organisations to ensure that the views of children and young people in marginalised situations and their perspectives on the Child Guarantee can be reported to the EU¹⁶.

04

¹⁵ Reaching In (2023). *Inclusion and Influence in Children's Participation*, University of Central Lancashire and Eurochild: Brussels.

¹⁶ *Ibid.*



Housing for children is a major issue. A safe and stable home environment is essential for children to thrive, grow and reach their full potential. Children with ethnic origin such as Roma children and a migrant background including Ukrainian and other refugee children are among those who struggle most when it comes to access to adequate housing, participation in mainstream Early Childhood education and care (ECEC) and education and benefiting from health care¹⁷. Subsequently, there is a high need to review current strategies for promoting quality in housing for children. Young people leaving alternative care are another vulnerable group to support with social housing schemes.

05



ECEC is a key determinant for a child's development, and for later success in life in terms of education, well-being, employability and social integration. However, the high cost of ECEC can generate inequalities in access. These inequalities lead to lost opportunities for ECEC as a potential equaliser of opportunities.

06



For children with disabilities, it is often hard to access quality inclusive education and key social and support services, including early childhood intervention services. They are also at increased risk of institutionalisation.

07



Single-parent households are at higher risk of poverty or social exclusion¹⁸. Economic strain may result in challenges such as difficulty meeting basic needs, housing instability, and limited resources for education and extracurricular activities for children¹⁹.

08

¹⁷ UNICEF (2023). *More than half of Ukrainian refugee children not enrolled in schools in Poland* (<https://www.unicef.org/eca/press-releases/more-half-ukrainian-refugee-children-not-enrolled-schools-poland-unicef-unhcr>)

¹⁸ Eurostat (2023). *Children at risk of poverty or social exclusion* (https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Children_at_risk_of_poverty_or_social_exclusion&oldid=576189)

¹⁹ Sunikka-Blank, M., & Galvin, R. (2021). Single parents in cold homes in Europe: How intersecting personal and national characteristics drive up the numbers of these vulnerable households. *Energy Policy*, 150, 112134. <https://doi.org/10.1016/j.enpol.2021.112134>



A Comprehensive Social Support is needed, i.e. access to affordable housing and provision of housing subsidies. In line with the Child Guarantee Recommendation, there should be a focus on developing services in the areas of ECEC, education, health-care, adequate housing, and healthy nutrition, to ensure the most vulnerable children will benefit from these services.

09



Education and skill development programmes for both parents and children that could break the cycle of poverty are needed. Scholarships, afterschool programmes, and vocational training opportunities would empower families to increase their employability and income potential.

10



Prevention and social protection of vulnerable families should be an integral part of child protection systems to ensure children remain with their families and to prevent family separation. More educational programmes for social workers and child protection workers should be supported to better address children in vulnerable situations. They should also be trained on employing a trauma-informed approach to children at risk.

11

Effective Interventions

Crisis intervention

Families with children might find themselves in an emergency situation, where immediate intervention is needed, both in terms of shelter/housing and support services. EU funds can be used to provide housing and support services to those in crisis situations, for example to families who are displaced. In this way, EU funding can help to ensure that children's basic needs and rights are being met, and family separation can be avoided.

Effective Intervention – Best Practices

Best Practice 1: Caritas Czech Republic offers five different asylum homes: «Asylum Home St. Zdislava», «Asylum home St. Zdislava – Domažlice», «Asylum home St. Zdislava - Karlovy Vary», «House Jonah» and «St. Agata Home Břeclav». All projects offer help to mothers and their children, but vary in their target groups, services, funding and partnerships. The projects all address the needs of deprived mothers and their children, who are in need of shelter. This includes amongst others: pregnant women, victims of domestic violence, families living in unsuitable conditions and homeless families. The target group of some asylum homes also includes homeless people and other people in crisis.

Best Practice 2: The project Homes for children in danger IV (2022 – 2023) implemented by [the Smile of the Child](#) (Greece): Funded under the Sectoral Development Program of the Ministry of Immigration and Asylum (National Development Program - NDP), this project aims at providing an adequate framework for the protection and care of unaccompanied minors and their preparation to reach autonomy. The project also finances the running costs of two existing homes for children at risk in Northern Greece with a special focus on unaccompanied refugee children and victims of abuse and neglect, irrespective of their nationality.

Best Practice 3: [Hope and Homes for Children](#) – Romania has been involved in implementing a EU-funded project aiming to support the participation of children in education, prevent school abandonment and support young people NEET to further their education and get access to the labour market. HHC – Romania carries out the identification of children, families, and NEET as well as the assessment of their needs. Experts then provide counselling regarding prevention of school abandonment, as well as regarding enrolment in education for children and NEET. They also provide support for parents through parenting courses. Some of the achievements of the projects are:

- None of the children included in the project have dropped out of school so far.
- The schools involved in the project are more aware of the needs of the children and they are offering several after-school activities and workshops addressed to disadvantaged or marginalised children, so that they can also enjoy school.
- Parents involved in the project are now better informed of the needs of their children, the challenges regarding education and the education support their children may need.
- NEET are currently pursuing education and counselling sessions, which will increase their chances of being integrated into the labour market.

Deinstitutionalisation towards the development of family-based care and support for care-leavers

Many children in Europe are at risk of family separation, or have already been separated from their families. Moreover, it is estimated that about 1 million children in Europe (including children with disabilities) live in institutionalised settings which put them at risk of negative health and developmental outcomes, as well as physical and emotional abuse.²⁰ Often, the reasons for family separation are poverty or a lack of support, and family separation can thus be prevented. More efforts towards deinstitutionalisation in Europe are thus highly needed, including focusing on prevention of family separation, supporting families, developing family- and community-based alternative care

²⁰ Desmond, C., Watt, K., Saha, A., et al. (2020). *Prevalence and number of children living in institutional care: global, regional, and country estimates*, *The Lancet Child & Adolescent Health*, 4(5): 370-377. DOI: 10.1016/S2352-4642(20)30022-5

options such as foster care, and training professionals who are in contact with children and families at risk such as child protection officers and social workers.

Effective Intervention – Best Practices

Best Practice 1: The Know-how Centre (Bulgaria) has been involved in EU funded projects aiming at promoting of Foster Care for Unaccompanied Children in Europe ([PROFUCE](#)), partnering with five other EU-based organisations in a project for promoting foster care for unaccompanied minors. Inspiring is also “[Fulfil the Impossible Dreams \(FID\)](#)”, a project for improving the professional capacity of specialists working with care leavers in Bulgaria.

Best Practice 2: Telefono Azzurro (Italy) was involved in a project called [CARE - Leaving with Care, Living with Care](#). The project addresses the risk for child victims of violence to experience a second trauma during the process of investigation, removal, and out-of-home placement. CARE aims to raise awareness regarding the trauma that children may experience during these processes and what first responders (social workers, law enforcement, officials, doctors, and caregivers) can do to reduce the stress levels associated with these processes.

Best Practice 3: [The Conscious Parent Academy: Replacement Parent Urgently Needed](#) project of Instituto de Apoio à Criança (Portugal) aims to support children who cannot live with their parents and are cared for by adults other than their biological family. These children are sent to foster families, and the goal is for them to feel integrated into the family environment and the provision of adequate care for their needs and wellbeing, providing them with an effective relationship and the necessary education for their full development. The task and responsibility of caregivers are large and complex issues, requiring legal, social, emotional, and educational support.

Direct work with children and youth

Investing in extracurricular activities, making them accessible in particular for children experiencing poverty, and creating strong social networks for them, helps to facilitate their social inclusion.

Effective Intervention – Best Practices

Best Practice 1: The «Initiative Cream Topping» project of Caritas Germany, founded in 2006, operates in south-west Germany. «Initiative Cream Topping» aims to provide the means to enable deprived children to experience the “better” things in life. The project aims to help children and teenagers (up to 18 years old) from very poor families, whose financial situation prevents them from joining a sports club or other spare time activities. The impact of this poverty results in the children and teenagers being unable to participate in sports or other creative activities, which in turn prevents them from exploring their full potential and from socialising with their peers.

Best Practice 2: Eurochild’s member Coordination of Associations for Children (CAC) representing Association Children First (Croatia) have a long tradition of being involved in EU-funded projects, especially at local and community levels, and of actively sharing examples of good practice. [SOC Opatija](#), in collaboration with the city of Opatija, has been involved in an EU-funded project named “Let’s start the wheel of our community”, that consisted of strengthening the local community for better children’s participation.

Best Practice 3: Members of [the Dutch NGO Coalition for Children’s Rights](#) are frequently involved in EU funded projects. For example, Save the Children Netherlands has been granted funding under the Asylum, Migration, and Integration Fund (AMIF) for the Team Up @ AZC project, which provides children aged from 6 to 18 years old, with a suite of structured sports, games, and movement activities. These activities also include support for children dealing with their complicated feelings such as anger, stress, and peer interaction. In addition, Defence for Children led the project Capisce, which works to improve the protection of victims of human trafficking in criminal procedures in the Netherlands and Europe. The project is funded by the EU Rights, Equality, and Citizenship Programme and involves 8 organisations throughout Europe²¹.

Family support

Family support, as a comprehensive and effective intervention, plays a pivotal role in fostering the overall well-being and stability of families. It embraces a holistic approach, acknowledging that the health and functioning of individuals are intricately connected to family dynamics. By offering a range of services, family support focuses on prevention, early intervention, and the promotion of positive parenting practices. These initiatives encompass education and skill-building opportunities for parents, crisis intervention during challenging times, and the encouragement of community engagement and networking. Moreover, family support emphasises cultural competence, ensuring that interventions are tailored to the unique needs of diverse families. This approach aligns seamlessly with the childcare sector, recognising that family well-being is integral to the healthy development of children. Integrating family support into childcare programs enhances the capacity of parents, particularly single parents, by providing them with the necessary resources, skills, and networks. By addressing the broader family context, family support contributes to the creation of a nurturing environment, optimising the positive impact of childcare services on children's growth and development. This interconnected strategy not only strengthens individual families but also builds a foundation for resilient and supportive communities.

²¹ Eurochild (2022). *(In)visible children, Eurochild 2022 report on children in need across Europe*, ([Invisible-children-Eurochild-2022-report-on-children-in-need-across-Europe.pdf](#))

Effective Intervention – Best Practices

Best Practice 1: From 2017-2021, funding from ESF was used to deliver Home-based Therapeutic Services to families in Malta.²² These services were offered to families who experienced issues related to violence, poverty, abuse, physical and mental illness and had “family preservation” as its ultimate goal. The model focused in addressing the risks to children directly, with the aim of helping them to remain with their families, rather than being placed in alternative care. In order to best reach families with complex needs, the services were mainly provided within the families’ homes.

Best Practice 2: the «ARTEMIDE» project, coordinated by Caritas Ambrosiana (Italy), in collaboration with the social enterprise «Farsi prossimo» in Milan (Italy), addresses disadvantaged or marginalised families (especially mothers) with infants (aged between 0 and 3), in need of psycho-pedagogical support during the periods of maternity and early childhood.

The project facilitates contact between these families and counselling and other services at local level; between families and the professional staff of the social enterprise and connects them with different relevant public services in the territory. It offers targeted interventions for help and support, orientation on educational, social and healthcare services, home visiting services to mothers, opportunities to socialise in groups and share experiences with other families, in particular to receive advice on parenting, maternity and early childhood problems.

Best Practice 3: Integrated Territorial Synergies for Children Health and Protection II (2017 – 2023), European Territorial Cooperation Programme “Interreg V-A Greece –Bulgaria” 2014-2020 of [the Smile of the Child](#) (Greece). This project aims to protect and improve the quality of life of children in cross-border areas. More than 6,500 children in Greece and Bulgaria received medical examinations through this project that includes the offer of training seminars for professionals, among other things. To contribute to the treatment of the Covid-19 pandemic, the project was extended to implement a series of actions including voluntary blood donations, provision of psychological and social support to children and families affected by the Covid-19 crisis, purchase of medical equipment to strengthen the National Health Systems at the cross-border level, training for school psychologists and educators, informative campaign, etc²³.

Education - employment

²² European Commission (2022). *Home-based service helps families in need to stay together* (<https://european-social-fund-plus.ec.europa.eu/en/projects/malta-families-stay-together>)

²³ Eurochild (2022). *(In)visible children, Eurochild 2022 report on children in need across Europe*, ([Invisible-children-Eurochild-2022-report-on-children-in-need-across-Europe.pdf](#))

Traditionally, ESF support has been associated with employment support and labour market integration. For many, limited access to good quality and affordable childcare is a barrier to pursuing training and employment, which can put the family at risk of poverty. This is particularly true for single parents, most of whom are women.²⁴ Across the EU many ESF projects aimed to combat this challenge. To this end, valuable interventions should be focused on developing specific projects or initiatives that focus on increasing the availability, affordability, and quality of childcare services, ensuring that they meet the needs of single parents seeking training and employment. This can be implemented by integrating childcare support seamlessly into existing ESF+ programmes focused on employment support and labour market integration. A large proportion of ESF+ support is already dedicated to improving the adaptability of workers, enterprises and entrepreneurs to changes in the workplace. Some of these changes reflect increasing flexibility of working arrangements, efforts to improve work-life balance and gender equality in the workplace. This effective intervention can also be supported by participatory processes that facilitate immediate action for change within communities, and thereby forms a potent strategy for fostering community empowerment and driving broader societal transformations. This approach involves actively involving community members in decision-making processes, ensuring their voices are heard, and encouraging collective actions to address immediate challenges. Simultaneously, the effort extends beyond the local sphere by articulating these experiences and perspectives to wider audiences, raising awareness, and advocating for systemic changes²⁵.

Effective Intervention – Best Practices

Best Practice 1: The work-life balance project with Caritas Vilnius (Lithuania) works with families with children, elderly and ill persons, communities and employers to balance work and family commitments in Lithuania. The project provides childcare services, a safe environment for children, homecare and social assistance for elderly and ill persons. The project also includes work with communities and employers to encourage them to create favourable conditions for balancing work with family commitments. Children can spend time in Day Care centres while parents are working or learning new working skills. Families can also rely on the Caritas Home Care Service and so have time for work and learning.

Best Practice 2: the School Counselling project is implemented by Secours Catholique - Caritas France and works with children across the country. School counselling consists of interventions to provide children with the necessary resources and support to succeed at school, particularly when the

²⁴ Rense Nieuwenhuis (2021). *Directions of thought for single parents in the EU*, Community, Work & Family, 24:5, 559-566, DOI: 10.1080/13668803.2020.1745756

²⁵ Reaching In (2023). *Strengthening Children's Participation in the Child Guarantee*, University of Central Lancashire and Eurochild: Brussels.

needed support is not given at home. The project contributes to preventing children from failing academically. It provides children with the opportunity to develop social links outside their usual environment, through a child-adult relationship which focuses on the child's specific needs. It also promotes and develops teenagers' and children's talents through play, leisure and cultural activities.

Best Practice 3: Working for the welfare of the family, Tauragė, Lithuania, 2009–2012

The project "Working for the welfare of the family" was launched in September 2009 by Pagegiai Municipality's Centre of Social Services in Taurage County with help from ESF funding. The overarching aim of the project was to assist rural women and families confined by the lack of available social services, such as childcare and nursing homes, in the region. Specifically, the project provided career advice and training in languages or computers for the women, to assist them with finding employment. To help with balancing life and work, the project also provided care for children or elderly family members when it was needed. The project was inspired by other projects in other ESF countries and by Norway in its promotion of social inclusion. As a result, several disadvantaged families with children with disabilities are currently enrolled in a rehabilitation centre during the day. Another testament to the project's success is that a major local company was able to set up crèche facilities for its workers in the region. The study team did not source an evaluation of this programme.

Best Practice 4: [Providing Access to Childcare and Employment \(PACE\)](#). PACE establishes research-backed tests that improve access to childcare, with special attention to the employment of disadvantaged or marginalised families. PACE offers a method to use parental involvement, voluntary engagement, training and tailored employment programmes to remove barriers to participation, to labour market and society, including building relationships and community spirit. PACE, broadens skills of childcare staff and improves the soft skills of volunteers and parents and coaches them towards employment, improving the living conditions and life prospects of disadvantaged and deprived families.

Holiday schemes

By offering holiday schemes, childcare providers address the need for continued assistance during vacation periods, ensuring that families have access to reliable and comprehensive services. These schemes often encompass a range of activities and support, including educational programs, recreational opportunities, and the provision of nutritious meals. Additionally, holiday schemes play a crucial role in preventing potential gaps in childcare that might arise during school breaks, facilitating parents' continued employment and training opportunities. Integrating family support principles into holiday schemes enhances their effectiveness, as these programs become not only a means of childcare but also a platform for providing resources, building parental skills, and fostering community

engagement. By recognizing the interconnectedness of family well-being and childcare needs, holiday schemes contribute to creating a supportive environment that benefits both parents and children, promoting resilience and stability within the broader community.

Effective Intervention – Best Practices

Best Practice: the «Family holidays» and «Family-hosted holidays for children» are projects implemented by Secours Catholique - Caritas France. These two project models target children, parents and families across France. Both models enable children to discover a different environment from the one they usually know, to participate in new leisure, sports, cultural and social activities and so help them to grow. Having new experiences in a positive atmosphere helps to contribute to their personal development, fulfilment, autonomy and socialization. Both projects create partnerships with social services. «Family Holidays» gives the opportunity for entire families to go on holidays together whilst being accompanied by the staff of Secours Catholique at a holiday resort. With “Family Holidays” the accompaniment provided during the holiday period allows the project staff to identify the concrete needs of children and provide them with the appropriate support (e.g. new eye-glasses, dental care etc.). “Family-hosted holidays for children” is a different model which enables the families with whom Secours Catholique works all year round, to send their children on holidays with host families for 3 weeks (on average). These host families live in a different environment, which allows the hosted children to enjoy a period of time in a different familial context in the company of other children of the same age. “Family hosted holidays” also creates networks amongst families. The expected result is the establishment of lasting relationships between host families and the children they receive and their family of origin. The project is mainly implemented by volunteers: about 2,000 host families and a large number of volunteers responsible for preparing and monitoring the reception of children/families.

6.3 Services for Persons with Disabilities

Relevance of ESF+ and ERDF for the sector

To ensure that actions meet the rules and priorities as set out in the EU funding regulations, this section summarises the main provisions related to the rights and social inclusion of persons with disabilities, as set out in the ESF+, ERDF and CPR regulations.

The CPR is a piece of over-arching legislation that applies to various EU funding programmes, including to ESF+ and ERDF. It outlines rules that must be followed and sets objectives for the use of these funds. The key provisions of the Common Provisions Regulations which address the rights of persons with disabilities are the following:

-
- Member States and the Commission shall ensure compliance with the Charter of Fundamental Rights of the European Union in the implementation of the Funds;
 - Funds should be implemented in a way that promotes the transition from institutional to family and community-based care, and should not support actions that contribute to any form of segregation or exclusion;
 - When financing infrastructure of all types, the accessibility of persons with disabilities should be ensured;
 - In order to access the funds, Member States should have a national framework for implementing the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) in place.

With reference to the first point, this includes non-discrimination (Article 21) and “the right of persons with disabilities to benefit from measures designed to ensure their independence, social and occupational integration and participation in the life of the community” (Article 26). Referring to the second point, in order to guide MAs in the funding of actions that do promote the transition from institutional to family and community-based care, the European Expert Group (EEG) on the transition from institutional to community-based care has created an [EU Checklist](#) and [Guidance](#) on independent living and inclusion in the community.

As for the last point, Member States should thus be implementing the UNCRPD and are encouraged to use EU Funds for this purpose. The UNCRPD refers to disability as the result from the interaction between the persons’ impairments and attitudinal and environmental barriers, which hinders their full and effective participation in society on an equal basis with others. To implement the UNCRPD and safeguard and uphold the rights of persons with disabilities, MAs should thus be actively working on breaking down such barriers, and prevent the construction of new ones.

The aim of the ESF+ is to support investments in people and systems in the policy areas of employment, education and social inclusion. Some of the key priorities relevant for service provision to persons with disabilities are:

- ESF+ should promote the active inclusion of people far from the labour market;
- It should be used to enhance timely and equal access to affordable, sustainable and high-quality services that promote access to housing and person-centred care and support such as healthcare and long-term care, in particular family- and community-based services;
- ESF+ should promote equal access to and completion of inclusive education and training, including early childhood education and care;
- ESF+ should ensure accessibility for persons with disabilities and promote the transition from institutional care to family and community-based care and support.

ESF+ can therefore be used for projects which deliver services in the above priority areas, for example by covering staff costs and training.

The ERDF aims to strengthen economic, social, and territorial cohesion within the EU. Under the objective of Social Inclusion, some of the relevant priorities are: Developing social infrastructure;

improving access to inclusive and quality services in education through developing accessible infrastructure; and promoting socioeconomic inclusion of disadvantaged groups, including people with support needs, through integrated measures including housing and social services.

ERDF can be used to fund investments in infrastructure, investments in access to services, equipment, and software. It can also be used in synergy with ESF+, whereby ERDF is for example used for accessible infrastructure, and ESF+ for the piloting of a service.

Needs and Challenges of the Sector

Support services should support persons with disabilities in such a way that they can exercise their rights (as set out in the UNCRPD), have choice and control over their lives, and participate fully in society. However, it should be noted that most countries have not yet fully implemented the UNCRPD. For example, in many, if not all EU Member States persons with disabilities still live in institutions,²⁶ are segregated in special education,²⁷ and are affected by a higher unemployment rate compared to non-disabled people. For instance, data show that in the EU there is still a high disability employment gap (21.4% in 2022 across all EU MS)²⁸, with women finding themselves even more often excluded from the labour market than men.²⁹ Because of outdated financial and legal systems, underfunding, skill gaps and staff shortages, it can be difficult for social services to make the transition to community-based and person-centred forms of care and support. The need for the transformation of services as well as the changes needed in law and policy are also underlined by the Special Rapporteur on the rights of persons with disabilities in his report [“Transformation of services for persons with disabilities”](#). With the help of EU funds, service providers can play a pivotal role in creating a more inclusive society by delivering and co-creating quality, accessible, person-centred, and community-based services. Key needs and challenges that were identified during the Helpdesk evidence-gathering activities and workshops are:



The transition from institutional care to family and community-based care and support.

01

²⁶ Jan Šiška and Julie Beadle-Brown (2020). *Report on the transition from institutional care to community-based services in 27 EU Member States*. (<https://deinstitutionalisationdotcom.files.wordpress.com/2020/05/eeg-di-report-2020-1.pdf>)

²⁷ EASIE (2018/2019). *School Year Dataset Cross-Country Report*. (<https://www.european-agency.org/resources/publications/EASIE-2018-2019-cross-country-report>)

²⁸ Eurostat data from 2022: *Disability employment gap by level of activity limitation and sex* (source EU-SILC).

²⁹ EDF (2022). *Disability and Gender Gaps: unequal employment of women with disabilities*. (<https://www.edf-feph.org/publications/disability-and-gender-gaps-addressing-unequal-employment-of-women-with-disabilities/>)



Adequate support for people with disabilities to live independently and have choice and control over their lives (including personal assistance, personal budgets and other forms of self-directed support).

02



Support for persons with disabilities to find accessible and adapted housing or to be supported in making necessary adaptations.

03



Making mainstream services inclusive and accessible, including education, early childhood education and care, transportation and healthcare services.

04



Inclusive socialisation and leisure activities.

05



Support for persons with disabilities to find employment in the open labour market, and be supported in their jobs.

06



Boosting skills and training opportunities for persons with disabilities, including opportunities for adult education and life-long learning.

07



Support families with a child with disability or at risk of developmental delays through effective early detection, early childhood intervention services and support to parents and caregivers, including to prevent institutionalisation.

08



Accessibility of public buildings, services, housing and information. Moreover, in some countries getting access to essential services for persons with disabilities in rural areas is complicated.

09



Awareness-raising activities to address stigma and prejudice against persons with disabilities.

10



The need for co-production: ensuring the real involvement of user groups in shaping projects. However, in practice it can be difficult to co-create projects due to the limited time that calls are open.

11



For projects targeting persons with severe disabilities/high support needs, it is sometimes difficult to show the impact to the funder, not least due to the fact that the “numbers” of persons reached or supported can be lower, whereas the individual impact for the beneficiary can be very high.

12



Although ESF+ can be used for different priorities, many countries and managing authorities have a strong focus on employment in their programming. To measure success, they focus on how many persons have been employed after the project, whereas employment is not the only prerequisite for inclusion of persons with disabilities. Therefore, more possibilities to combine different active inclusion elements are needed, such as supported employment in combination with other daytime activities for persons with intellectual disabilities.

13

Typology of Interventions

In order to use EU funds in a way which is aligned with the funding regulations, helps to implement key EU Policy frameworks, and addresses the needs of the sector, we advise that MAs use ESF+ and ERDF for the following interventions:

The transition from institutional to community-based care

Many persons with disabilities in the EU still live in institutions, and EU Member States are highly encouraged to use EU funds for deinstitutionalisation. Deinstitutionalisation requires closing institutions, developing family and community-based services and coaching and supporting persons with disabilities with moving out of institutions and living independently, among other things.

Effective Intervention – Actions which can be funded

Development of community-based services; training of institution staff on person-centred support to be able to work in new services or in other jobs; developing and delivering individually designed support processes for the independent living of individuals; supporting persons leaving institutions with their independent living skills; facilitating peer support and developing peer support networks to facilitate the transition to the community or the transition from the family's home to independent living; supporting people leaving institutions with strengthening family ties (when desired), their inclusion in the community and active citizenship.

Personal Assistance and Personal Budgets

Personal Assistance and Personal Budgets or other forms of self-directed and person-led support are key to ensure independent living of persons with disabilities, and therefore promote their right to express their voice, choice, and control over the type of support they want to use and the life they want to live. Personal assistance means that a person with a disability can choose their own personal assistant and that they are at the centre of decisions concerning the assistance. The level of personal assistance provided should meet each person's needs for support. Not all EU Member States have personal assistance systems in place, or they have systems which can be improved, as they are inadequate or insufficient.³⁰ In addition, Member States should invest in the development of supported decision-making systems, as some people will require supported decision-making in order to manage their personal assistant and/or personal budget.

Effective Intervention – Actions which can be funded

Piloting personal assistance services and/or other models of individualised support; providing support to persons with disabilities on how to handle their personal budgets and the administration that comes with hiring personal assistants, including peer support; promoting the job of a personal assistant; training for personal assistants on person-led support and self-determination; awareness-raising activities among persons with disabilities and their families about the benefits of personal assistance and personal budgets; quality assessment of personal assistance services.

Effective Intervention – Promising Practices

Promising Practice 1: [Implementing Personal Assistance in Croatia with ESF](#)

In 2017, seventy four Croatian associations of disabled persons were awarded agreements to implement projects co-financed by ESF aimed at developing personal assistance services.

Promising Practice 2: [Support Model for Independent Living in Portugal](#)

A support model for independent living is realised with the provision of personal assistance through Independent Life Support Centres was co-financed under the European Structural and Investment Funds for Portugal 2020. The activities of the Centres include provision of personal assistance, training of personal assistants and awareness and dissemination actions.

Accessible and Adapted Housing for Persons with Disabilities

³⁰ ENIL (2023). *Independent Living Survey*. (<https://enil.eu/il-map/>)

In order to respect the right of people with disabilities to live independently, they should have choice and control over with whom and how they live, and therefore have access to accessible and adapted housing options. However, the European Strategy for the Rights of Persons with Disabilities points at insufficient provision of housing as one of the main barriers preventing inclusion. With the help of EU Funds, services can play a role in supporting persons with disabilities in this area. The provision of housing should not be tied directly to the support services a person receives as otherwise individuals will risk to lose their support should they decide to change their living arrangements, or vice versa. Persons with disabilities should thus be supported to get access to housing and to the support services they require wherever they live.

Effective Intervention – Actions which can be funded

Support to find housing opportunities for persons with (higher) support needs; making housing physically accessible for persons with disabilities; contributions to cover housing costs of persons with disabilities (in combination with other inclusion/employment measures); developing co-living projects where young people with and without disabilities live together; building more accessible and affordable housing; installing assistive devices in homes to facilitate independent living; assistance with adapting one's home to own specific needs.

Services enabling choice and control

Persons with disabilities should have choice and control over their lives, and in some cases they require support to make these decisions. In addition, they should be able to make decisions about the type of service they receive and from which provider, and all the information about the various options should be presented to them in a clear, transparent and understandable way.

Effective Intervention – Actions which can be funded

Services informing persons with disabilities about available support options and support accessing these services; actions facilitating peer support; actions facilitating supported decision-making; training for persons with disabilities and family members about their rights and how to advocate for these rights.

Creating accessible and inclusive mainstream services

Where mainstream services are not accessible and equipped to meet the needs of everyone, for example for persons with disabilities, local authorities should prioritise redesigning and funding these services so they may be used by and benefit all.

Effective Intervention – Actions which can be funded

Making infrastructure of mainstream services accessible; projects facilitating cooperation between Disabled People Organisations (DPO's), persons with disabilities, service providers and local authorities to make mainstream services accessible; training of staff in mainstream services (e.g., healthcare and adult education centres) on disability inclusion and human rights-based approaches; supporting access to assistance at work or in education, through personal assistance and providing other reasonable accommodations.

Socialisation and leisure activities

People with disabilities, like anyone else, have a need for socialisation and leisure, but they often face social isolation³¹ or barriers to take part in (mainstream) social and leisure activities. In many countries there are “Day Care” activities for persons with disabilities, but often these activities do not allow for choice and control. They sometimes replace education or employment, and they are often segregated. Persons with disabilities, however, should be free to choose which kind of activities they want to be part of and when, and activities should complement rather than replace education and/or employment opportunities. Not only the activities themselves should be inclusive and accessible, but the person should also be able to reach the activity.

Effective Intervention – Actions which can be funded

Projects which include persons with disabilities in social and leisure activities, e.g. by offering transportation to and from social and leisure activities and extra supporting personnel when needed; improving accessibility of leisure facilities such as swimming pools, cinemas, theatres, sport centres, etc.

Inclusive Education, including Early Childhood Education and Care

In many EU Member States, education systems, starting from early childhood education and care (ECEC), are not fully inclusive, which means that pupils with disabilities are still often educated in segregated classes and/or schools or are excluded from education. Inclusive education refers to education environments that adapt the design and physical structures, teaching methods, and curricula as well as the culture, policy, and practice of education environments so that they are accessible to all pupils without discrimination. Not only education environments need to be adapted. In addition, awareness needs to be raised among parents of children with and without disabilities about inclusion and the UNCRPD principles.

Effective Intervention – Actions which can be funded

Call for proposals to provide subsidies for teaching assistants to support inclusive education and ECEC; training teaching staff on inclusion; awareness-raising activities about inclusion and UNCRPD principles among parents and the wider community; making education buildings accessible (including nurseries, kindergartens and vocational training and higher education facilities).

Preventing institutionalisation, and deinstitutionalisation of children with disabilities

There are still children with disabilities in Europe growing up in institutions, which denies their right to grow up in a family. Children with disabilities often end up in institutions because of a lack of support to the child and their families and caregivers. Member States are thus encouraged to use EU funds to facilitate the transition of children with disabilities from institutional to family care, and to support families to prevent institutionalisation. In addition, caregivers sometimes think that their child is better

³¹ Emerson E., et al. (2021). *Loneliness, social support, social isolation and wellbeing among working age adults with and without disability: Cross-sectional study*. *Disabil Health*, 14(1):100965. DOI: 10.1016/j.dhjo.2020.100965.

off in an institution and/or in segregated education. Therefore, awareness-raising among parents and caregivers about the importance and benefits of inclusion is also very important.

Effective Intervention – Actions which can be funded

Support to families with a child with a disability, including to prevent placement in alternative care (e.g. through personal assistance; training of parents; early childhood intervention services); services helping caregivers accessing the right support; specialised support to parents and caregivers who receive a child back home after living in an institution; programmes to prepare children for the transition to living in a family; training of social workers on how to work with families with children with disabilities; access to assistive technology and equipment and training on how to use these devices.

Early Childhood Intervention and Early Detection

Early detection of developmental delays and disabilities in children followed by early childhood intervention, can greatly help children with better outcomes throughout their life course.³² Early Childhood Intervention (ECI) is a field of family-centred, individualised services for infants and young children (0-6 years old) and their families. They help to identify, prevent, overcome, or minimise at-risk situations. They include the assessment of child and family members' needs, the creation of individualised family service plans, the provision of services including speech, physical, and occupational therapies, communication and socialisation programmes, infant-parent psychotherapy, counselling to parents, and more.³³ Although many EU Member States offer specific services and therapies for children with disabilities, only a few Member States currently guarantee comprehensive ECI services.

Effective Intervention – Actions which can be funded

Training on ECI for staff and managers of services; setting up and piloting early childhood intervention services; setting up and piloting of early detection services; projects promoting collaboration between ECI services and ECEC; training of staff in ECEC and other relevant services such as healthcare on early detection.

Short-term childcare and informal support for families (respite care)

Children with disabilities often require extra care and support, because of their impairment and barriers in the society. This makes the role of caregiver more intensive, with larger impact on their financial and social situation, and professional and personal life. It is therefore important that caregivers are supported and can get a break now and then. Activities facilitating this are often being referred to as “respite care”. In practice this often means that children are being sent off to an institution for a period of time, which is not aligned with UN and EU disability rights frameworks. Thus,

³² UNICEF (2022). *Early Detection Tools for Children with Developmental Delays and Disabilities*. (<https://www.unicef.org/mena/media/17716/file/Early%20Detection%20Tools%20For%20Children%20With%20Developmental%20Delays%20And%20Disabilities.pdf>)

³³ EASPD (2022). *Family-centred Early Childhood Intervention: The best start in life*. (<https://easpd.eu/publications-detail/eci-position-paper-family-centred-early-childhood-intervention-the-best-start-in-life/>)

inclusive short-term care and informal support are essential to grant parents a break and can also be a fun way to facilitate children’s socialisation and inclusion.

Effective Intervention – Actions which can be funded

Peer support programmes for families with children with disabilities and support to establish informal networks; staff training to support families establishing informal support networks; inclusive holiday clubs; inclusive after school care and leisure activities; short break services in the family’s home; facilitating sharing of good/innovative practices of respite activities.

Facilitating access to the open labour market for persons with disabilities

Persons with disabilities face a higher level of unemployment than persons without disabilities. Due to discrimination, stigma and a lack of reasonable accommodation, it can be hard for them to find a job in the open labour market. In addition, when they are employed, these are often poorly paid jobs. Women with disabilities are even less likely to be in paid employment than their male peers, due to intersectionality³⁴.

Effective Intervention – Actions which can be funded

Support through Guidance counsellors which help persons with disabilities with the move from education to employment; individual placement and support (IPS) services; inclusive job design/job carving; assistance by specialised job coaches working with groups facing multiple discrimination (e.g. persons with disabilities with a migrant background); support for persons with disabilities to move to the open labour market from supported employment; funding of adaptations in the workplace and purchase of assistive technology.

Effective Intervention – Promising Practices

Promising Practice 1: [The Poweria! Project in Finland](#)

The aim of the ESF-funded Poweria! Project (2021-2023) is to support multicultural people in Finland who need support due to a mild intellectual disability or other special needs to find their own study and working life path. The project organises group and individual coaching. The Project strengthens the self-awareness, strengths and social inclusion of the participants, while providing adequate and appropriate support.

Promising Practice 2: [Change4Inclusion](#)

Change4Inclusion is an ESF-funded project implemented in Belgium, Latvia and Spain which aims to support employers to make the shift of mindset needed for an inclusive workplace. It also helps to anchor inclusive job design, including by means of job crafting and job carving.

Boosting skills and training opportunities for Persons with Disabilities

Boosting skills and training opportunities may also help persons with disabilities find a job. Training can focus on improving their general skills (e.g., mobility skills) which can also help them in employment,

³⁴ European Commission (2023). *Catalogue of positive actions to encourage the hiring of persons with disabilities and combating stereotypes*

(https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8570&furtherPubs=yes&pk_source=newsletter&pk_medium=email&pk_campaign=eu_social_newsletter)

or specific skills which are in high demand by the job market, with a training adjusted to their interests and abilities.

Effective Intervention – Actions which can be funded

Promoting skills aiming to ensure better participation in professional, political and social life; offering pre-employment training; training for persons with intellectual disabilities, for example on digital skills or soft skills; improving the accessibility of higher education for persons with disabilities.

Effective Intervention – Promising Practice

Promising Practice 1: The [Kompetent mobility project](#) in Germany is designed to promote mobility skills in people with disabilities. Depending on individual requirements, the training may include topics such as using a wheelchair, walking with an aid, travelling by bus, train or care. Every activity which aims to ensure better participation in professional and social life.

Support to maintain people in employment

When people acquire an impairment or illness during their life course, they can be at risk of falling out of employment or may need support to adapt to their new reality in the workplace, and the workplace may need support to adjust to new needs. Disability Management is a process in a workplace designed to facilitate the return to work of injured or ill employees through a coordinated effort taking into account the needs of the individuals, the work environment, and legal obligations.

Effective Intervention – Actions which can be funded

Disability Management services and programmes; Return to work services and programmes.

6.4 Care and Support of Older Persons

Relevance of EU Funds for Services for the Elderly

The ESF+ recognises the evolving needs of Europe's aging population and has provisions to support active aging and social inclusion among the older persons. It places a strong emphasis on extending the working life of older people through skill development and employability programmes. Furthermore, ESF+ commits resources to address social isolation among the elderly, fostering meaningful connections within their communities. It also plays a significant role in improving the quality of healthcare and long-term care services, investing in healthcare infrastructure, training healthcare professionals, and promoting innovative solutions through the Strand for Health. Additionally, the ESF+ encourages lifelong learning opportunities for all citizens, including the elderly, through various training programs and initiatives.

The ERDF contributes to building an age-friendly Europe by focusing on the creation of accessible infrastructure. It supports the development of public spaces, transportation systems, and housing that cater to the specific needs of the elderly, ensuring their mobility and independence. Additionally, the ERDF encourages economic development that generates employment opportunities for older

individuals. It backs initiatives aimed at providing age-friendly workplaces and fostering entrepreneurship among seniors, reinforcing their active participation in the workforce.

The CPR forms the regulatory framework that governs the use of EU funds and places a strong emphasis on inclusion and non-discrimination. It stipulates that projects funded by the EU must benefit all members of society, irrespective of age, ensuring that elderly individuals have equal access to services and opportunities. Moreover, the CPR aligns EU funding actions with the principles of the EPSR, underscoring the right to access affordable healthcare, long-term care, and social protection for elderly citizens. EU funds are expected to contribute to realising these rights. The CPR also encourages a multi-fund approach, enabling the coordinated use of various EU funds to address the complex challenges associated with aging populations. This approach fosters comprehensive, cross-sectoral solutions.

The European Pillar of Social Rights serves as a guiding framework for EU funds, emphasising an integrated approach to address the diverse needs of the elderly. It highlights the importance of social protection, healthcare, and employment in ensuring the well-being of aging populations. The EPSR advocates active support for aging workers, promoting access to training, lifelong learning, and safe working environments. Additionally, it emphasises the right to affordable long-term care services, recognizing the significance of dignified and independent living for the elderly.

In summary, EU funds, as outlined in the ESF+, ERDF, and CPR regulations, play a pivotal role in supporting older persons, contributing to the creation of a more inclusive and age-friendly Europe. These provisions encompass various aspects of elderly care, from healthcare and employment to social inclusion and active aging, all aligned with the principles of the European Pillar of Social Rights. They reflect the EU's commitment to ensuring that elderly individuals enjoy a high quality of life, social inclusion, and well-being as they age.

Needs and Challenges of the Older Persons

In addressing the needs and challenges of the support and care of older persons, it is imperative to transition from a predominantly medical model to a more holistic, person-centered approach that prioritizes overall quality of life. This shift recognizes that many individuals require support not solely due to acute health issues, but also as a result of social factors such as lack of support, poverty, and housing insecurity. Moreover, as the population ages, proactive measures focusing on prevention, inclusion, and community activation are essential to combat social isolation and ensure that older individuals can actively participate and find purpose in economic and social life. Major challenges and needs for care and support of older persons linked to the use of EU funds can be outlined as follows:



A growing need for a more holistic, person-centred approach and the rights-based model that prioritises overall quality of life, especially when users do not have acute health issues.

01



The focus should shift to enhancing the quality of life. This shift recognises that quality of life encompasses both living well and experiencing a dignified and comfortable end-of-life process.

02



Care providers should shift their focus toward prevention and inclusion. They should proactively engage with older individuals before the need for formal care arises.

03



Care providers should work on activating communities to include individuals in neighbourhood activities, even if they reside in nursing homes or care facilities so that they do not become vulnerable. Keeping older persons socially connected and helping them find a sense of purpose should be a primary goal, also to address the problem of social isolation, considering that an increasing number of adults in the EU are experiencing social isolation (75 million people – 18 % of the population); and the risk of social isolation is highest among older people, while the feeling of loneliness is most significant in the 26-45 age bracket³⁵.

04



As the population ages, there is a growing demand for various social services, including care and support of older persons, home support, and assistance for those with age-related disabilities. The increased demand can strain resources and budgets for social services, potentially leading to shortages in care providers and services³⁶.

05



There is a need for the evolution of social services to meet the changing needs of older populations, focusing on maintaining independence, preventing social isolation, and promoting active aging³⁷.

06



Recognising the pivotal role played by family caregivers is essential, as many older individuals rely on informal care provided by their families. Therefore, the development of services and support systems for caregivers becomes indispensable.

07

³⁵ EU Science Lab (2019). *How lonely are Europeans?* (https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/how-lonely-are-europeans-2019-06-12_en)

³⁶ European Parliament (2021). *REPORT on an old continent growing older – possibilities and challenges related to ageing policy post-2020* (https://www.europarl.europa.eu/doceo/document/A-9-2021-0194_EN.html#_ftn21)

³⁷ *Ibid.*



A proactive approach that prioritises preventive healthcare becomes inevitably important. By prioritising prevention, it is possible to reduce the strain on healthcare systems and encourage healthier aging for older individuals.

08

Typology of Interventions

Aging in Place: Supporting Independent Living

One of the key priorities for the older persons is the ability to age in place, meaning they can continue living in their own homes and communities comfortably and safely. EU funds can play a significant role in making this possible. By investing in accessible housing options, such as retrofitting existing homes with features like ramps and grab bars, or constructing new age-friendly homes, the EU can empower older individuals to maintain their independence. Additionally, funding can support personal assistance services that offer help with daily tasks like bathing, dressing, and meal preparation, enabling seniors to live at home for longer. Home modifications, such as installing stairlifts, enhancing bathroom safety, installing elevators, and fitting rooms with smart technology solutions, can further reduce fall risks, ensuring a secure living environment.

Effective Intervention – Actions which can be funded

Public transport safety training for seniors and drivers funded by EU subsidy (Intelligent Energy Europe)

The programme for seniors focused on the development of abilities and skills and on the elimination of risks and stress when using public transport in the city of Salzburg took place in the form of training, which was spread over two days. Participants also received a brochure with important information from the course. Its aim was to prevent loss of mobility and social exclusion due to fear of travel, support self-sufficiency and flexibility of the elderly, and also reduce the financial burden (compared to individual transport). In addition, drivers are trained to know the needs and specifics of the behaviour of seniors. As part of the training, a test drive takes place where both seniors and drivers learn practical skills.

The participants' statements show that training is essential for maintaining individual mobility into old age. The evaluation of the programme also showed that the implementation of the programme is financially accessible and that the prepared training set (containing a manual and a DVD, as well as special glasses and earplugs so that drivers have an idea of the limitations of the elderly) is generally usable. The evaluation recommendations concern the necessity of cooperation with an expert (transportation, management) and an organization with a social focus.

Social Inclusion and Community Engagement

Addressing social isolation and loneliness among the older persons is essential for their well-being. EU resources can be channelled into initiatives that promote socialization and community involvement. Community centres can be established or improved to offer a wide range of social activities, fitness classes, and educational programs tailored to seniors' interests. Furthermore, accessible, and affordable transportation services can be created to ensure that older individuals can easily participate in community events and engage with others. Volunteer programmes that involve seniors in mentorship or community service roles can provide a sense of purpose and belonging, fostering meaningful connections within the community.

Effective Intervention – Best Practice

HELP Healthy Lifestyles for Elderly People funded by Erasmus+

This is a European Level Project which aims to empower older people in Europe to adopt healthy lifestyles which include a healthy diet, physical activity, and social participation.

HELP aims to develop the quality and cost-effectiveness of services for older people by promoting cooperation between service providers and recommendations on communal care and support to older persons services.

While the aims of preventative health care and active ageing are widely recognised, there is still a lack of knowledge and skills how to efficiently prevent health problems and exclusion of older people considering the wholeness of a person. HELP answers to this challenge by developing tools for supporting healthy lifestyles and active citizenship of older people.

Healthcare and Long-Term Care Services

Access to quality healthcare is paramount for the older population. EU funding can support the expansion of primary care clinics, particularly in underserved areas, to improve healthcare accessibility. Preventive care programmes, such as vaccinations, health screenings, and wellness checks, can be established to enhance the overall health of the older persons. The implementation of telemedicine infrastructure allows seniors to access medical consultations remotely, reducing barriers to healthcare access, especially in remote or rural areas. Additionally, effective interventions for digital literacy can be integrated to empower older people in utilising digital health tools, ensuring they can navigate telemedicine platforms with confidence and ease. Educational initiatives and support programmes can play a vital role in enhancing their digital skills, making these technological solutions more accessible and beneficial for the older population.

Older persons Employment and Lifelong Learning

Encouraging the employment and continuous learning opportunities can greatly benefit older workers. EU resources can be directed towards training programmes designed to enhance the skills and employability of elderly workers, allowing them to remain engaged in the workforce. Lifelong learning centres can be established to offer opportunities for personal development, skill acquisition, and social interaction. Additionally, initiatives that promote entrepreneurship among older workers can stimulate economic activity and provide opportunities for income generation, contributing to their overall well-being. It is crucial to ensure that older workers are not forced to work solely due to financial challenges associated with inadequate pensions.

Effective Intervention – Best Practice

Austrian Platform for Health Literacy

In Austria, health literacy (see the third health goal below) is considered one of the main factors contributing to a healthy lifestyle into old age. In order to achieve this goal, the Austrian Platform for Health Literacy (***Österreichische Plattform Gesundheitskompetenz, ÖPGK***) was established in 2015. This platform supports activities at various levels aimed especially at senior citizens. It focuses on the fulfillment of the third health goal (to improve the health literacy of the population).

Caregiver Support and Respite Care

Recognising the crucial role of caregivers in supporting the older persons, EU funds can support caregiver training programmes to ensure they possess the necessary skills and knowledge to provide effective care. Establishing respite care opportunities allows caregivers to take essential breaks while ensuring the well-being of their older loved ones. To further assist caregivers, online support platforms can be developed, providing access to information, connection with support networks, and valuable resources.

Effective Intervention – Best Practice

SUSTAIN (*Sustainable Tailored Integrated Care for Older People in Europe*)

SUSTAIN is a European-wide project and gathers partners from eight countries: Austria, Belgium, Estonia, Germany, Norway, Spain, The Netherlands, and the UK. The project is funded by Horizon 2020, the European Commission's funding programme to support research activities.

SUSTAIN will in particular aim to support and improve what we call "integrated care," which has a potential to concretely improve care services and save some costs. The project aims to make care more comfortable and ensure peace of mind for service users and for their relatives; make services well organised, with a team of health and social care providers who will be there for the persons who need them, when they need them, in order to support independent living. Ultimately, it aims to support policy and decision makers so policies and care services can better support independent living and address older people's needs.

Age-Friendly Services and Accessibility

Creating age-friendly communities and services is essential for the older population. EU funding can be allocated to initiatives aimed at improving public spaces, transportation options, and housing to meet the needs of seniors. Additionally, addressing digitalisation challenges, resources can be invested in digital literacy programs and accessible technologies tailored to seniors' requirements. Ensuring that public information and services are presented in formats that are can be easily accessed and understood by older individuals is also crucial for their inclusion and overall well-being.

Effective Intervention – Best Practice

One of many examples of good practice that are intended to point out the variability of implemented healthy aging programmes at federal level is [**Jedes Alter Zählt \(Every Age Counts\)**](#).

Jedes Alter Zählt is a strategy implemented as of 2016 at the federal level aimed at promoting healthy aging in Germany. Under the auspices of the Ministry of the Interior. In addition to senior citizens, the strategy also targets families and children, and as part of it, a multi-level dialogue with federal states, local administration and stakeholders is supported. It is aimed at supporting free decision-making in old age, social activities of seniors and supporting healthy aging and the availability of quality care based on the needs of seniors.

6.5 Homelessness

Relevance of the ESF+ and ERDF for the sector

In recent years a paradigm shift has happened from talking about managing homelessness towards ending (and preventing) homelessness. Housing First is a proven practice in this field to achieve this

goal and it has become clear that a housing-led approach and Housing First is therefore needed. “Housing First is a homeless assistance approach that prioritises providing permanent housing to people experiencing homelessness, thus ending their homelessness and serving as a platform from which they can pursue personal goals and improve their quality of life. This approach is guided by the belief that people need basic necessities like food and a place to live before attending to anything less critical, such as getting a job, budgeting properly, or attending to substance use issues. Additionally, Housing First is based on the understanding that client choice is valuable in housing selection and supportive service participation, and that exercising that choice is likely to make a client more successful in remaining housed and improving their life”³⁸. The ESF+ recently included many priorities that can be used to support the fight against homelessness and to promote Housing First.

In contrast to the previous planning period, the ESF+ mentions homelessness and housing exclusion specifically. This means the ESF+ can be used for funding Housing First projects.

Especially the following policy objectives of the ESF+ are relevant for funding needs within Housing First (Regulation 2021/1057):

(h) Fostering active inclusion with a view to promoting equal opportunities, non-discrimination and active participation, and improving employability, in particular for disadvantaged groups. Homelessness is part of the required national strategic policy framework for social inclusion and poverty reduction (see “Enabling Conditions” 4.4. of the Regulation).

(k) Enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare; modernising social protection systems, including promoting access to social protection, with a particular focus on children and disadvantaged groups; improving accessibility including for persons with disabilities, effectiveness and resilience of healthcare systems and long-term care services (see Enabling Conditions 4.6. of the Regulation).

(l) Promoting social integration of people at risk of poverty or social exclusion, including the most deprived persons and children.

(m) Addressing material deprivation through food and/or basic material assistance to the most deprived persons, including children, and providing accompanying measures supporting their social inclusion.

Funding is often necessary for realising Housing First projects, because the programme comes with high start and maintenance costs. Across Europe favourable structures and interest for Housing First exists but what is needed now to see an increase in Housing First projects around Europe are financial

³⁸ National Alliance to End Homelessness (2022). *Housing First* (<https://endhomelessness.org/resource/housing-first/>)

tools. The ESF+ has potential to support these efforts and add value to them through the available grant money. It should however not be seen as a tool that has the power to completely replace national, regional or local funding.

Concretely, ESF+ funds within Housing First projects can be used for:

- social integration measures, employment measures
- Measures addressing objective (k): Enhancing equal and timely access to quality, sustainable and affordable services, including services that promote the access to housing and person-centred care including healthcare

In his regard, the ERDF provides funding for various purposes, such as constructing or enhancing infrastructure, including housing and renovating existing buildings.

This means the ERDF can be used for:

- Sourcing housing for Housing First initiatives
- The socio-economic inclusion of marginalised communities, low-income households, and disadvantaged groups.

Needs and Challenges of the sector

A variety of European funding tools that can be used for interventions in the homelessness sector exist, however, there are challenges that hinder the access to said grants and in some cases the tools are not sufficient to cover the needs in the homelessness sector and more specifically for Housing First projects.

Recent numbers show that homelessness continues to increase within most European countries and an estimated number of 895,000 people are currently experiencing homelessness in Europe³⁹.

This stresses the importance of overcoming the challenges that are still present when it comes to accessing EU funding in the sector. The main challenges identified during the desk research and at the first sectoral workshop are:

³⁹ FEANTSA and the Abbé Pierre Foundation (2023). Eight Overview of Housing Exclusion in Europe. (https://www.feantsa.org/public/user/Resources/reports/2023/OVERVIEW/Rapport_EN.pdf)



The funding is often still not enough to cover the high cost of housing.

01



The challenging housing market makes it difficult to source adequate housing.

02



It can be difficult to use grant money for covering the costs of monthly rents.

03



In some cases policy interventions lack a specific emphasis on homelessness; one example would be the Reinforced Youth Guarantee.

04



A lack of awareness of what types of interventions can be funded using EU grant money.

05



Difficulties with ensuring that ESF projects are implemented within a strategic approach to end homelessness.

06



Low importance is given to effective interventions for the prevention of mental health problems.

07



It seems like currently there is still a missing link between the political discussion and the practical implementation of the Housing First approach.

08

Typology of Interventions

To ensure that EU funds are utilised in accordance with funding regulations, support the implementation of important EU Policy frameworks, and cater to the sector's requirements, we recommend that managing authorities and organisations operating in the field of homelessness consider utilising ESF+ and ERDF for the following interventions specifically when trying to implement Housing First projects:

Education and knowledge exchange

In order to ensure the continuous quality of Housing First services and enable a constant good practice sharing of projects around Europe, it is important to invest in Housing First education and knowledge exchange.

Education often refers not only to internal education programmes within companies but also to post-secondary education, such as entire university programmes on Housing First or singular modules within different study fields such as social work, psychology, health care.

Another promising approach to improve Housing First interventions is to ensure the sharing of expertise and resources and to build strong networks during this process.

Effective Intervention – Action that can be funded

Cooperation with universities and researchers, running university programmes and courses, mutual learning activities, development of education programmes for staff, reskilling, and upskilling of healthcare and long-term care workforce.

Best Practice

Municipal strategies for preventing homelessness in Finland

From 2016 until 2019, ARA (The Housing Finance and Development Centre of Finland) implemented the municipal [strategies for preventing homelessness project](#) which was funded using ESF money. In the project, different operating methods of preventing homelessness were tested and operational models of homelessness work were piloted using a Housing First approach. Within the scope of the project, the first housing social courses were implemented at academic level.

Staff measurements

The EaSI strand (Employment and Social Inclusion strand) of the ESF+ is useful for upskilling workers, hiring additional specialists and covering general staff costs. It is important to ensure that Housing First teams are interdisciplinary to meet the service users' needs adequately and simultaneously ensure that staff are adequately compensated for their work.

Effective Intervention – Action that can be funded

Hiring experts through experience, hiring additional specialists (e.g. psychologists, social and mental health care workers), hiring peer workers, education of experts through experience.

Best Practice: Housing First Implementation in Italy using ESF and FEAD

In 2016 a [call for proposals](#) led by the Ministry of Labour and Social Policies aimed to tackle homelessness was launched.

The goal of the call was to strengthen existing services and implementing a strong Housing First approach centred upon social inclusion and tailored support. Funding was used, among other purposes, to build interdisciplinary teams (including social workers, educators, cultural mediators, psychologists, etc.) to provide individualised, targeted support to homeless individuals, implement pilot projects. Priorities also included the recruitment of experts such as social workers, linguistic mediators, or psychologists.

Training

One important pillar to enable the upscaling and spreading of Housing First around Europe is to ensure that Housing First projects exhibit a high degree of fidelity. To ensure that this is done, it is important to provide Housing First trainings and invest to tackle staff shortages.

In addition to that, one of the main checkpoints⁴⁰ that need to be crossed off before using ESF+ money for Housing First projects is to check if calls for projects comply with the eight core principles of Housing First⁴¹. Training the staff of different organisations therefore helps to ensure that the right project calls can be designed or identified and that when working with these calls and the related project implementation fidelity to Housing First can be secured.

Effective Intervention – Action that can be funded

Developing and implementing training for social and health care workers.

Best Practice:

Municipal strategies for preventing homelessness in Finland (See above)

Cooperation and Capacity Building

For the successful implementation of Housing First projects, Housing First cannot be seen as an individual, stand-alone project that can be executed by one person in one organisation, rooted in one single sector. Instead, a mix of different sectors, people, professions and approaches is needed. Therefore, it is important to also use the funding coming from EU grants for capacity building.

Effective Intervention – Action that can be funded

⁴⁰ European Commission, Directorate-General for Employment, Social Affairs and Inclusion, Kasper, R. (2021). Checklist, How to target and support people experiencing homelessness with the European Social Fund Plus (ESF+). (<https://data.europa.eu/doi/10.2767/543655>).

⁴¹ The 8 core principles of the “Housing First” approach are: i) Housing is a human right; ii) Choice and control for service users; iii) Separation of housing and treatment; iv) Recovery orientation; v) Harm Reduction; vi) Active engagement without coercion; vii) Person-centred planning; viii) Flexible support for as long as is required.

Exchange visits, cross-sector cooperation, mutual learning activities, development of service designs, implementation of service design thinking workshops, establishing work groups and hosting meetings with the work groups.

Support for homeless people in (re) accessing the labour market

Homeless individuals often face barriers when trying to access or re-access the labour market. Targeted interventions can support individuals in the process and help them overcome potential barriers they face along the way.

Effective Intervention – Action that can be funded

Support in finding training for upskilling, labour market guidance and counselling, offering of employment and professional training programmes. It is important that any activity respect the will and preference of the person.

Tailored support for young people experiencing homelessness

With rising numbers of youth homelessness around Europe it is important to pay separate attention specifically to Housing First for Youth (HF4Y)⁴² programmes and how they can be funded. The investment in Housing First is also a long-term investment as the programme has such a big focus on prevention which means it helps people before they even become homeless in the first place. Prevention is also important because it is estimated that the majority of people who experience homelessness at a young age, are likely to become homeless again.

Research shows that around 30% of the homeless population are under the age of 30 which furthermore stresses the importance to invest in and develop HF4Y programmes⁴³.

Effective Intervention – Action that can be funded

Development and implementation of training on HF4Y principles, sourcing housing for Housing First for Youth programmes, labour market counselling.

Providing housing for Housing First tenants

As indicated in the name itself, sufficient housing is necessary for the successful implementation of Housing First. However, sourcing housing for Housing First projects has become increasingly difficult due to the current housing crisis all around Europe (and also worldwide).

⁴² HF4Y is a rights-based intervention for young people who experience homelessness, or who are at risk. The goal is to help prevent homelessness or help youth to quickly exit homelessness. HF4Y is designed to address the needs of developing adolescents and young adults by providing them with immediate access to housing that is safe, affordable and appropriate, and the necessary and age-appropriate supports that focus on health, wellbeing, life skills, engagement in education and employment, and social inclusion. It is not time limited, and more than just offering housing and supports.

⁴³ A Way Home Canada, the Canadian Observatory on Homelessness and FEANTSA (2016). Youth Rights! Right Now!. (<https://www.feantsa.org/download/youthrights-guideeu-finalcompressed57863223550928774401.pdf>).

A shift away from temporary accommodation towards permanent solutions is needed for the success of Housing First. Therefore, using funds to support the sourcing and retention process for suitable accommodation for Housing First users are needed.

Successful and innovative examples on how to acquire housing for Housing First around Europe already exist. However, whether it is about the renovation of unused properties or about becoming one's own social landlord, in all cases monetary resources are needed (as well as time and energy). Sourcing housing has become one of the biggest challenges that Housing First organisations face⁴⁴. That is where both the ESF+ and the ERDF come into play.

The same holds for the use of those two funds to overcome segregation in housing. The [“Note on the use of EU Funds in tackling educational and spatial segregation. 2021-2027 programming period”](#) from 12 December 2022 concludes in this regard: “EU Funds investments should aim at contributing to close the physical and social gap between segregated and non-segregated areas and it should improve access to quality, inclusive, mainstream services and infrastructure (such as educational, social and health care facilities, public transportation, green infrastructure and public spaces and public utilities such as water, electricity and gas, etc.)”.

Effective Intervention – Action that can be funded

Buying housing (investments in purchasing properties including vacant houses), renovating housing, transforming housing (buildings that had a different previous use, e.g. fire station, bank), cover the starting costs that arise when purchasing a property or building (insurance, deposits).

Best Practice 1: [Housing First for Families in Brno, Czechia](#)

In Brno, 50 families with children were housed for one year with the possibility of prolongation in Brno under a Housing First for Families project using ESF money. The participating families were able to choose according to their housing and neighbourhood preferences.

Best Practice 2: [Housing First Latvia Pilot](#)

The “Providing support measures for the homeless project” in Latvia was planned as a local innovation and strategy changer since services mostly used the staircase model – which requires people to demonstrate an ability to move from one level of accommodation to another by addressing lifestyle issues, particularly problematic alcohol use – in Latvia and ran in three municipalities over the course of one year. The project was funded through ESF money, and the money was used for refurbishments and to partly cover rental and utility costs.

6.6 Work Integration

Relevance of the ESF+ and ERDF for the sector

The Article 8 of the CPR “Partnership and multi-level governance” is of huge importance as it lays down the provisions of the inclusion of stakeholders. Moreover, article 39 “composition of the monitoring

⁴⁴ Housing First Europe Hub (2023). Unlocking Housing for Housing First. https://housingfirsteurope.eu/wp-content/uploads/2023/06/HF_SourcingHousing_final_web.pdf.

committee” specifies what actors need to be included in the monitoring committee. “Each Member State shall determine the composition of the monitoring committee and shall ensure a balanced representation of the relevant Member State authorities and intermediate bodies and of representatives of the partners referred to in Article 8(1) through a transparent process.”

The work integration sector is largely relying on ESF+. The [Social Economy Gateway](#) launched by the EC in 2023 mentions that “ESF+ should be one of the first doors you push in your search for EU support.” However, some work integration is also funded by ERDF, seeking to strengthen economic, social and territorial cohesion in the EU by correcting imbalances between its regions. Social economy organisations can look at applying to ESF+ generic funding or to its funds dedicated to the development of the social economy and the social investment arena (ESF+ Social Innovation and ESF+ EaSI).

The relevant sections for social economy under the ESF+ regulation are the following:

- Article 4 (1) a specifies that the following is a specific objective of ESF+: “improving access to employment and activation measures for all jobseekers, in particular young people, especially through the implementation of the Youth Guarantee, for long-term unemployed and disadvantaged groups on the labour market, and for inactive people, as well as through the promotion of self-employment and the social economy”.
- Article 3 (1) points out that one of the general objectives of ESF+ is that “the ESF+ aims to support Member States and regions to achieve high employment levels, fair social protection and a skilled and resilient workforce ready for the future world of work, as well as inclusive and cohesive societies aiming to eradicating poverty and delivering on the principles set out in the European Pillar of Social Rights.” (2) makes reference to fair and quality working conditions.
- ESF+ should help implement the Council Recommendations of 15 February 2016 on the integration of the long-term unemployed into the labour market, the Council Recommendation of 19 December 2016 on Upskilling Pathways and the Council Recommendation of 30 October 2020 on A Bridge to Jobs – Reinforcing the Youth Guarantee and of the one of 12 March 2021 on Roma equality, inclusion and participation.
- More specifically, ESF+ should aim to promote integration and reintegration into the labour market, in particular for young people, especially through the implementation of the reinforced Youth Guarantee, for long-term unemployed people, for disadvantaged groups on the labour market and for inactive people, as well as by means of promoting self–employment and the social economy.
- The ESF+ should aim to improve the functioning of labour markets by supporting the modernisation of labour market institutions.
- The ESF+ should promote a gender-balanced labour market participation and equal working conditions, improved work-life balance and access to childcare, including early childhood education and care.
- The ESF+ should also aim to provide a healthy and well-adapted working environment in order to respond to health risks related to changing forms of work, and the needs of the ageing workforce.

-
- The ESF+ should contribute to the promotion of accessibility for persons with disabilities with a view to improving integration into employment, education and training, thereby enhancing their inclusion in all spheres of life.

One of the actions of the Social Economy Action Plan was the launch of a new Youth Entrepreneurship Policy Academy in 2022 under ESF+. The academy will foster youth entrepreneurship, including for female and social entrepreneurs, by working with national policy makers and youth entrepreneurship networks.

The ERDF's funding priorities align the purpose and work of all social economy organisations. One of the 5 policy priorities of ERDF is the following: "Increased social inclusion, supporting effective and inclusive employment, education, skills, social inclusion, and equal access to healthcare, as well as enhancing the role of culture and sustainable tourism". Notably, the ERDF seeks to invest for growth and jobs and in territorial cooperation. Hence, the ERDF can be a means by which social economy organisations, often implementing concrete solutions to local social and economic challenges, can develop and/or provide innovative solutions to identified needs at regional and transnational levels, in cooperation with local authorities. The ERDF regulation mentions PO 4 in relation to a more social and inclusive Europe implementing the European Pillar of Social Rights by: (i) enhancing the effectiveness and inclusiveness of labour markets and access to quality employment through developing social infrastructure and promoting social economy. Moreover, Article 5 (1) d specifies that the ERDF will support "productive investments in SMEs and investments aiming at safeguarding existing jobs and creating new jobs".

Needs and Challenges of the sector

When looking at work integration of disadvantaged groups, often linked to the social economy through work integration social enterprises, there are a number of specific needs and challenges. The Social Economy Action Plan points out that because social economy entities are not sufficiently understood and recognised, they face difficulties developing and scaling up their activities and, thus, are held back from realising a bigger social impact.⁴⁵



Work Integration Social Enterprises (WISEs) structures – especially those offering supported employment – are not easily attracted by ESF+ funding, as it is associated with a lot of technical requirements and bureaucracy.

01

⁴⁵ European Commission (2021). *Building an economy that works for people: an action plan for the social economy.* (<https://www.socialeconomy.eu.org/wp-content/uploads/2021/12/Building-an-economy-that-works-for-people-an-action-plan-for-the-social-economy.pdf>)



A challenge that is often expressed by work integration social enterprises networks is the need for funding existing activities or additions/ further development of existing activities. The social services also mentioned that there is not enough funding for many emerging challenges/ areas, such as employment for migrants.

02



Work integration social enterprise networks are often not included in the ESF+ monitoring committees. A better involvement of social economy networks to the ESF+ monitoring committees could improve the design and monitoring of ESF+ funding to respond to the specific needs of the work integration sector.

03



The legal form of a WISE can sometimes be an obstacle as for some project applications a specific legal form is required (such as NGO but not all WISEs might be registered as NGO). This depends on the national legal framework.

04



ESF+ and ERDF are not accessible enough for small WISEs. They suffer from a lack of cashflow blocking them to pre-finance the implementation of a project. Small WISEs have an increasing need of tailor-made pre-financing solutions.

05



Need of investments in the development of human resources from social enterprises in accordance with the trends in the labour market.

06



Need of elaboration of new occupational standards and innovative training programs with emphasis on the integration into work of disadvantaged or marginalised groups.

07



Need of development of training programmes in the field of social entrepreneurship / social innovation in university education institutions. Accordingly programmes for step-by-step labour market integration for particularly vulnerable groups.

08



Providing integrated packages of services for people from disadvantaged or marginalised groups based on the one-stop-shop principle: social assistance, counselling and professional guidance; training; mediation and employment in WISEs or on the labour market, job coaching.

09



Development of national strategies / public policies and visibility tools for the sector through the involvement of social enterprises.

10



A recurring challenge expressed by WISEs networks is the need for available funding for every of organisations that have proven their effectiveness, regardless to their maturity level (early-stage, acceleration, scaling-up, franchising, internationalising). There is often a focus on start-ups or other new activities but not always on the development of already existing WISEs (networks).

11



Funding can also come from socially responsible purchases / reserved contracts for WISEs, tax exemptions or the granting of non-fiscal facilities mainly at the level of the communities in which they operate.

12



Establishment at local and national level of working groups dedicated to the development of the social economy sector through the involvement of public and private stakeholders.

09

Typology of interventions

To ensure that EU funds are being effectively used to implement the policy goals set out in different policy agenda's related to work integration, a series of effective interventions have been identified.

Labour support measures for disadvantaged groups

Labour support measures cover interventions that provide temporary support for groups that are disadvantaged in the labour market and which aim at activating the unemployed, helping people move

from involuntary inactivity into employment, or maintaining the jobs of persons threatened by unemployment.

Effective Intervention – Action that can be funded

Job Intermediation

- Labour counselling and professional orientation
- Dual systems of labour counselling/job matching in combination with training
- Access to labour market information, job matching and placement services

Incentives for Economic Integration

- Support for self-employment and entrepreneurship
- Programmes to support the development of social entrepreneurship
- Recognition of certain target groups as eligible for social economy, more specifically displaced persons or people with a migration background. Use EU funds to support labour market integration through social economy.
- Employment incentives: maintenance of percentage of social security in combination with salary
- Outplacement initiatives
- Job creation funds
- Supported employment
- Wage subsidies
- Social security interventions:
 - Social security reductions for the employers employing disadvantaged groups
 - Maintenance of percentage of social security interventions (e.g. replacement income) in combination with salary.

Best Practice: SWR Poland

A good practice comes from SWR – the Association for Regional Cooperation. The largest project financed by ESF+ in Poland, is designed to support refugees from Ukraine, aims to create 40 jobs for Ukrainian men / Ukrainian women in social enterprises in the Silesia region, Poland. For this purpose, SWR received approx. EUR 420,000 from the Regional Operational Programme thanks to the decision of the regional government. They allocate these funds mainly to grants for those social enterprises that want to employ displaced people from Ukraine. In addition, several other Social Economy Support Centers in the region received smaller amounts from this programme for various other forms of support for refugees from Ukraine.

Training people on the job (skill development for disadvantaged groups)

Workers with support needs often face skills shortages. According to the B-WISE⁴⁶ project results, the key skills that workers with support needs must develop are operational skills, which are essential to carry out day-to-day work activities with accuracy, precision, and autonomy. What skills are needed depends on the type of economic activity and the types of barriers a person faces/has faced.

⁴⁶ B-WISE (2021-2024) is an Erasmus + “Blueprint” project which aims to develop and implement a new strategic approach to sectoral cooperation on skills needed to reinforce the empowering work of WISEs, to strengthen the skills and competences of disadvantaged groups and to sustainably tackle the digital gap and digital challenges the sector faces.

On-the-job learning could be a useful method to tackle this challenge. It entails training and learning in the workplace, making learning processes part of the working experience – using the devices, documents, tools, and materials staff are already using on a day-to-day basis. On-the-job training is particularly relevant in light of the EPSR principle on skills and the 2023 European Year of Skills.

Effective Intervention – Action that can be funded

Skills and Needs Assessment

- Skills and qualifications assessment and profiling

Skills Development

- Access to vocational education and training (VET) and further education
- Training in combination with VET
- Specific professional skills development programmes for labour market integration
- Access to traineeships, apprenticeships and internships
- Mentoring services on-the-job by for example WISE managers
- Training with a focus on twin transition
- Person-centred training (training where the person is put at the centre of the organisational activities, the term is mainly linked to the disability field)
- Micro trainings (meaning very short trainings of a couple of hours/a day to acquire specific skills)
- Augmented reality supported training (using digital applications to support the work, e.g. projections of work instructions on work table)

Recognition Of Skills and Qualifications

- Validation and certification of skills (including informal and non-formal skills)
- Recognition of social economy enterprises as TVET providers giving recognition of qualifications: Partial qualifications (Unit(s) of learning outcomes (knowledge, know-how, information, values, skills and competences) acquired by an individual, and which have been assessed and certified by a competent body against a predefined standard, but which does not lead to a full qualification; Skills passports (overview of several documents showcasing skills in a single file)

Start-up – social enterprises: support development of WISEs

When it comes to work integration, work integration social enterprises sometimes face the challenge that funding is focused on new start-ups and not on supporting the already existing work integration social enterprises networks. This increases the risk of funding entities that instrumentalise work integration and social economy to obtain funding but do not have a deeper knowledge on the specificities of the sector.

Effective Intervention – Action that can be funded

- Provide funding for proven good practices
- Increase the evaluation points for entities that work according to the principles of social economy and that include disadvantaged workers
- Provide funding for social economy and work integration networks rather than solely focusing on start-ups
- Replication of good practice models

Inclusion of work integration (social enterprises) networks in the ESF+ monitoring committees

This is a different type of intervention as it is mainly organisational and participatory in nature. The inclusion of work integration (social enterprise) networks in the ESF+ monitoring committees is crucial as the voice of social economy is often underrepresented in these monitoring committees.

Effective Intervention – Action that can be funded

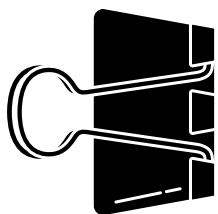
- ESF Managing Authorities including the voice of work integration social enterprises networks
- Include the feedback of work integration (social enterprises) network for the upcoming programming periods

Best Practice:

The ADV Romania Foundation, a member of RISE - the Romanian Network of Work Integration Social Enterprises - , was accepted as a member of the ERDF funds monitoring committee in the North-East Region of Romania. As a member with the right to vote, the foundation proposed and gained approval that in the call for proposals dedicated to SMEs, social enterprises should receive 3 extra points in the evaluation, because they have this authorisation and have a significant social impact. In this way, social enterprises will be supported to have access to financing, as they have a low score in the evaluation of the profitability rate.

7. Checklist

This section provides a checklist for those designing programmes and preparing calls to ensure effective use of the ESF+ and ERDF in line with knowledge and good practice. This chapter serves as a compass, directing MAs and Public Authorities efforts towards aligning their initiatives with the ESF+ and ERDF's objectives while adhering to best practices. By incorporating this checklist into their planning process, MAs can ensure that their programmes are designed with utmost precision and are in sync with the established knowledge and principles.



Conduct a needs assessment

- o What are the existing challenges in social, health, employment, education, and housing?
 - o Which social services are necessary to address these challenges?
 - o How can the needs of individuals be identified and prioritised?
 - o Are the relevant stakeholders, CSOs, organisations representing the users, the users themselves and experts adequately involved in the identification of the needs?
-

Fully involve stakeholders

- Who are the key stakeholders, and how can they be involved in the decision-making process?
 - How can it be ensured that the design and delivery of social services aligns with the needs and preferences of service users, representative of different groups, and civil society organizations?
-

Develop a Strategy

- What can be the best comprehensive way for delivering social services?
 - What are the specific targets, outcomes, and performance indicators aimed to achieve?
 - How does the outlined strategy align with broader goals and policies?
-

Identify appropriate Funding Sources

- What potential funding sources, such as grants or partnerships, can support the social services initiatives?
 - How can resources like the ESF+ and ERDF be secured for financing?
-

Develop a clear and efficient budget

- What are the financial resources required to implement and enhance social services?
 - How can the budget be optimised to address challenges or innovate in service delivery?
-

Monitor and Evaluate the Performance

- How often should the performance of social services programmes be assessed?
 - What methods will be used to track progress and identify areas needing improvement?
 - How can service users and civil society organisations be involved?
-

Foster Innovation

- How can innovative thinking in the design and delivery of social services be encouraged?
 - What strategies can be employed to explore integrated approaches that are more effective?
-

Promote Collaboration and Communication

- How can be facilitated collaboration among various stakeholders involved in social service delivery?
 - What mechanisms can strengthen coordination among local and regional authorities and service providers?
 - Are strategies of continuous communication between the MA and the social services adequately implemented?
-

Provide Training and Capacity Building

- What training and capacity-building opportunities are essential for social service providers and other relevant actors?
 - How can it be ensured that the MAs have the necessary skills and knowledge?
 - Do social services providers have enough time to design a project for a call for proposals?
-

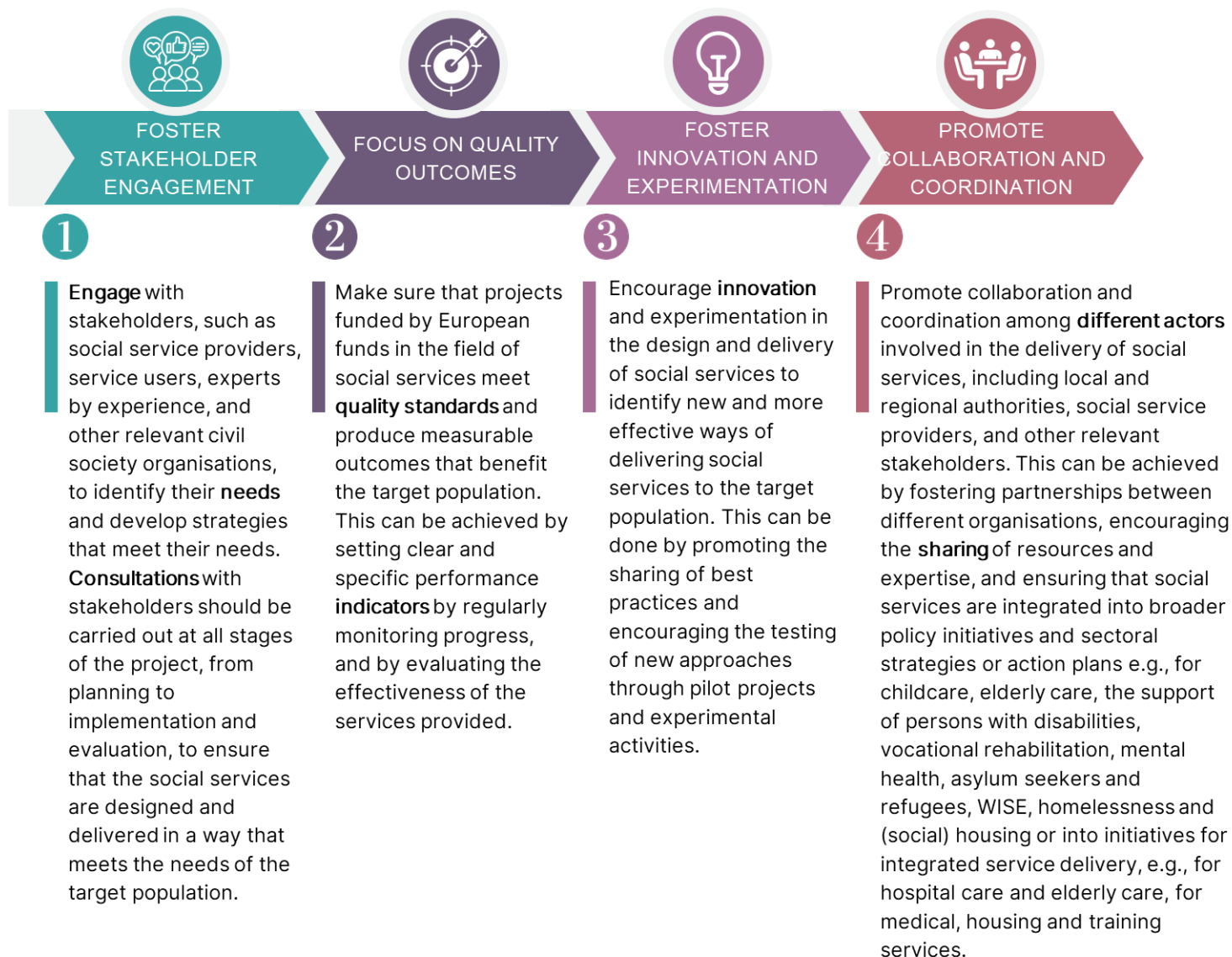
Ensure Transparency and Accountability

- How can a transparent process for reporting and feedback be established?
 - What measures should be in place to address concerns and complaints in a fair and accountable manner?
-

8. Practical Steps

8.1 Practical Steps for MAs

The following is a list of quickly actionable measures MAs can immediately take to ensure ESF+ and ERDF achieve maximum effectiveness and sustainability, in line with the principles of the EPSR and other relevant laws and policies. The measures aim to cover horizontal issues affecting social services across the EU. These measures serve as a practical roadmap for achieving optimal outcomes in social services, empowering MAs to address current challenges and promote long-term sustainability of those services and also to support social innovation adapted to specific needs at the local or regional level.





ENHANCE CAPACITY BUILDING AND TRAINING

5

Provide **capacity building** and training opportunities for social service providers and other relevant actors to ensure that they have the skills and knowledge required to deliver high-quality social services. This can be done by providing training courses, seminars, and other professional development opportunities to help social service providers improve their skills and knowledge.



PARTNERSHIP BUILDING

6

To ensure cross-sectoral collaboration, it is essential to **build partnerships** with relevant stakeholders across different sectors. This could involve engaging with representatives from civil society organisations (including local community organisations and user organisations), private sector organizations, public sector agencies, and other relevant actors to create a shared understanding of the social issues and of the opportunities for collaboration to improve social, health, education, employment and housing outcomes for those in need of support, guidance, care, etc.



CO-DESIGN AND CO-CREATION

7

Cross-sectoral collaboration should also involve **co-design and co-creation** of projects, programmes, and initiatives. This will ensure that the expertise of all stakeholders and the experience of users is harnessed to develop effective and sustainable solutions that can have a significant impact on social issues.



SHARED VISION AND VALUES

8

Cross-sectoral collaboration can also be achieved by creating a **shared vision** and values that are aligned with the goals and objectives of EU funds for social services. This will help ensure that all stakeholders are working towards the same goals and will facilitate cooperation and coordination across different sectors.



9

Cross-sectoral collaboration requires flexibility and adaptability to deal with the challenges that may arise during the implementation of social service projects. This could involve **adapting to changes** in the political and economic environment, responding to emerging social issues, and adjusting strategies to better meet the needs of beneficiaries.

1

Effective communication and knowledge sharing are critical to cross-sectoral collaboration. This could involve **sharing information, data, and best practices** across different sectors, creating platforms for dialogue and exchange, and leveraging the expertise of different stakeholders to enhance the impact of social service projects.

8.2 Practical Steps for Social Services

The following is a list of quickly actionable measures social service providers can immediately take to ensure ESF+ and ERDF contribute to ensuring access to social services, in line with the principles of the European Pillar of Social Rights and other relevant local, regional, national, European policy frameworks, and international law. The measures aim to cover horizontal issues affecting social services across the European Union.

01



Conduct a needs assessment

to identify the specific needs of the (target) population and ensure that social services are tailored to meet those needs.

02



Implement a user-centred approach

to service delivery that focuses on the needs and preferences of the individual users. Involve the users in the design and development of services implementing a co-production mechanism.

03



Use evidence-based practices

to ensure that services are effective and efficient in meeting the needs of the users.

04



Develop partnerships

with other service providers to ensure that users receive comprehensive and coordinated services.

05



Ensure that staff are adequately trained

available in adequate numbers, being protected in line with the health and safety requirements, and supported by management and digital tools to provide high-quality services that are responsive to the needs of the users.

06



Implement a quality assurance programme

to monitor and evaluate service delivery and ensure that services are meeting the needs of the users.

07



Ensure that services are accessible

to all users, including those with physical or intellectual disabilities, by removing physical and communication barriers.

08



Use technology

to enhance and improve service delivery, such as telehealth services or online appointment booking but also ensure the appropriate training to be able to correctly use digital devices by the staff and the users.

09



Provide information and education

to the users about their rights and entitlements to social services. Make sure that service providers are also aware of users' rights and entitlements.

10



Develop and implement a complain and feedback mechanism

to ensure that users can provide feedback and raise concerns about service delivery.

9. Policy Recommendations

Policy Recommendations for MAs

Programming and Implementation

- ▶ **Inclusive process:** When developing the OPs ensure an inclusive consultation process for the preparation of the national operational programmes, involving all relevant stakeholders,

including small providers of social services and their networks.

- ▶ **Flexible calls for proposals:** Encourage more flexible calls for proposals that combine different actions, so that they can be complemented with activities tailored to the social services context and

ecosystem, and thus create conditions that encourage social and active inclusion (e.g. call for proposals that complement ERDF and ESF+ priorities).

- ▶ **Promote calls for smaller grants and/or smaller minimum thresholds.**
- ▶ **Appraisal criteria:** Review the appraisal criteria for applications for subsidies, so that small providers can access funding and get the support that they need to do so.
- ▶ **Encourage complementarity between EU funds:** Encourage and make easily realisable applications for calls, subsidies, contracts, or financial support agreements that favour complementarity between different project funds used, for example between ERDF and ESF funds for interventions to improve the access to (social) housing or the transformation/refurbishment of housing or investments in climate-friendly heating systems or car fleets.
- ▶ **Specific lines of action:** Promote specific lines of action for disadvantaged or marginalised persons and groups, in order to establish objectives and results that are adapted to the various profiles (i.e., there is no provision for children to be defined as a target audience, even though they are the target audience for many social sectors).

Staff and training

- ▶ **Training and support programmes:** Establish or extend training and support programmes to help social services providers, especially the smaller ones, to present projects and manage funds. This could be done with the support of

sectoral networks, umbrella organisations or platforms.

- ▶ **Training and capacity building:**
 - Promote training and capacity building to enable social services providers to better assess the outcome and impact of projects, not least in order to generate a greater culture of evaluation amongst the project partners.
 - Capacity building initiatives should include specialised and tailored internal training for MAs staff on social impact measurement. This training should provide MAs with tools, methodologies, and best practices to define, measure, and monitor the social impact of funded projects. By strengthening their capacity in this area, MAs can make informed decisions, set realistic targets, and evaluate the effectiveness of projects in achieving desired social outcomes.
 - Capacity building programmes should also focus on equipping MAs with the necessary knowledge and skills to identify, support, and nurture disruptive social innovation projects.
- ▶ **Upskilling/reskilling programmes:** Promote upskilling/reskilling programmes (such as general vocational education and training (VET) and continuous professional development (CPD) for all professionals working in the field, by encouraging and financing training activities.

Goals and needs

- ▶ **Line of action for social innovation:** Promote and/or set up a specific line of action for social innovation, with sufficient funding, and that provides financial coverage for scaling up or

transferring the innovative projects that are currently being implemented.

- ▶ **More qualitative indicators:** Incorporate indicators that complement current ones to give more visibility to social aspects (e.g., social inclusion, labour market integration, inclusiveness, accessibility, etc.), to offer a comprehensive view of the results and impacts of a project, and not to forget about the qualitative impact of social services. Indicators that put an emphasis on the impact on the lives of persons supported rather than numbers need to be implemented. Moreover, indicators to prevent segregation should be added and promoted.
- ▶ **Goals and results:** Set goals and results that are adapted to the needs of those who are most disadvantaged and who face greater obstacles for social and labour market inclusion and for a full participation in our societies, such as people with severe disabilities, homeless persons or migrants, to strengthen the efforts made to avoid their exclusion from the job market and social exclusion.

Evaluation

- ▶ **Indicators:** Incorporate indicators that complement current ones to give visibility to social aspects (e.g., social inclusion, labour market integration, inclusiveness, accessibility, segregation, etc.) to offer a comprehensive view of the results and impacts of a project, which cannot be grasped by quantitative indicators. Ensure that the qualitative indicators are properly understood and mastered by the inspectors to ensure a more flexible and fair evaluation.

- ▶ **Cost of the evaluation of the results:** Ensure that the costs of evaluating results and impact of a project are always an eligible expenditure in the projects.

Communication

- ▶ **Public-private collaboration:** Improve existing exchanges between the public bodies and the social services (this can, e.g., be done by organising multi-year annual calls, promoting public tendering and encouraging public-private partnerships, etc.)
- ▶ **Simplify management systems:** Simplify management systems to reduce bureaucracy and duplication.
- ▶ **Improved and regular dialogue:** Encourage greater dialogue and participation of relevant networks and platforms in the sector throughout the full cycle of projects, especially in the design and formulation phase of programming EU funds.
- ▶ **Greater coordination:** Promote greater coordination among European fund management bodies when setting the appraisal criteria and the management criteria for calls to apply for financial support from EU funds, as well as encouraging greater coordination among the organisations that benefit from the calls.
- ▶ **Management tools:** Modernise European fund management tools, especially those used by MAs, by developing management tools and applications that favour automation and reduce the focus on management. MAs should collaborate to develop an integrated digital information system that provides a centralised

platform for managing and exchanging data related to EU-funded projects. This system allows MAs to access and exchange project-related data, progress reports, financial information, and other relevant documents. MAs should invest in the development of digital management tools that streamline administrative processes and facilitate project monitoring and evaluation. Moreover, to encourage cross-country cooperation and knowledge sharing, MAs should establish cooperative platforms that facilitate collaboration and exchange of best practices.

- ▶ **Coordination among the managing bodies:** Promote greater coordination among European fund management bodies when setting the appraisal criteria and the management criteria for calls to apply for financial support, as well as encouraging greater coordination among the organisations that benefit from the calls, in order to establish common

management criteria and generate synergies among the managing bodies during the intervention.

- ▶ **Improve how existing public-private collaboration instruments are used:**

- Organise multi-year calls to apply for subsidies, and thus reduce the yearly administrative burden.
- Increase public tendering and partnerships as alternative management formulas, to make the management more stable; in tenders, the cheapest price should not have a dominant weight when it comes to making a choice, as quality criteria and social clauses need be considered in the selection of a project proposal.
- Encourage projects to be presented jointly in collaboration and partnership between different parties, especially in social innovation projects. The benefit of this approach is illustrated by projects that have been promoted through the Recovery and Resilience Plans.
- Implement a deep involvement of users/experts by experience.

Policy Recommendations for Social Services

- ▶ Before developing project proposals, **conduct a needs assessment** to identify the specific needs of the (target) population and ensure that social services are tailored to meet those needs.
- ▶ The needs assessment done by Social Services interested in elaborating project proposals – and, where appropriate, in cooperation with other key stakeholders, in particular local and regional government, Public Employment Services, social insurance bodies, other non-profit/social economy organisations, etc. – should form

the **basis to develop, roll out and scale up service designs that are person-centered, user-oriented, rights-based, respecting the dignity of the service users and – where relevant – support their empowerment and autonomy.**

- ▶ When developing project proposals, use **evidence-based and proven solutions** to have social services which **address the needs** of the individual users and identified needs of a specific group of marginalised or disadvantaged users in an effective and efficient way.

-
- ▶ Design and promote **integrated and comprehensive social services**, involving partnerships with other service providers and the relevant local and regional government, Public Employment Services or social insurance bodies.
 - ▶ Implement mechanisms and use **quantitative and qualitative indicators** to monitor and evaluate the effects of the service delivery and to guarantee that the social services piloted or scaled up with the financial support of ESF+ or ERDF can best respond to the needs of the users and improve their wellbeing (referring also to the principle of co-production).
 - ▶ Design social services in a way that they are **accessible to all users**, including those with physical or intellectual disabilities, by providing support measures or personnel and by removing physical and communication barriers.
 - ▶ Design social services that make use of **ICT** in a way **to improve the service quality**, to facilitate the work of the workforce delivering them and to guarantee the rights and autonomy of the service users, building on their individual capacities.
 - ▶ Design social services piloted or scaled up with the financial support of ESF+ or ERDF that pursue the aim to have adequately **trained staff, available** in adequate numbers, being **protected** in line with the health and safety requirements, and **supported** by management and digital tools to provide high-quality services that are responsive to the needs of the users.
 - ▶ Design social services that **respect the rights of end users**, facilitate **social inclusion**, and **prevent discrimination, segregation**, and social exclusion.

10. Conclusion

The Technical Guidance on Effective Interventions in Social Services represents a culmination of rigorous research, collaboration, and strategic insights aimed at optimizing the utilisation of ESF+ and ERDF resources within the realm of social services. As we conclude this document, it is evident that navigating the complexities of social service delivery requires a multifaceted approach that encompasses both practical considerations and strategic foresight.

Throughout this guidance, we have explored the myriad challenges and needs faced by MAs and Social SPs in effectively leveraging EU funds to enhance social inclusion, cohesion, and well-being across the EU. From practical challenges in fund management to the imperative of fostering social innovation, each section offers valuable insights and actionable strategies for driving positive change within the social services sector.

By acknowledging the diverse landscape of social service provision and embracing cross-sectoral perspectives, this guidance underscores the importance of tailored approaches and targeted interventions. From childcare and disability support to care of older persons and homelessness services, the assessment

of sub-sectoral needs and challenges highlights the necessity of adaptive strategies and collaborative efforts in addressing the unique needs of diverse populations.

As we look towards the future, it is imperative to continue fostering dialogue, sharing best practices, and nurturing innovative approaches within the social services sector. By collectively embracing the principles of collaboration, inclusivity, and innovation, we can work towards building more resilient, cohesive, and inclusive societies across the EU. Together, let us continue to strive for excellence in social service delivery, ensuring that every individual has the opportunity to thrive and contribute to the fabric of our communities.



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