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THE EVOLUTION OF ESF TOWARDS ESF PLUS BASED ON THE EXAMPLE OF POLISH EXPERIENCE

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Purpose: The aim of the article is to identify and assess the areas of support from the ESF (2004-2020) and the ESF+ (since 2021) in Poland and its regions in the context of the assumptions of subsequent programming documents and supporting operational programs implemented in the periods 2004-2006, 2007-2013, 2014-2020 and in the perspective of 2021-2027.
Design/methodology/approach: The article reviews the literature relating to the support of social areas within the framework of the EU structural and cohesion policy, implemented through the Structural Funds, with particular emphasis on the ESF and the evolution of this fund towards the current ESF+. The provisions of the most important strategic documents containing the assumptions for the implementation of cohesion policy in Poland in the subsequent EU financial perspectives in the years 2004-2020 and the still ongoing period covering the years 2021-2027 were analysed.
Findings: The assessment of the areas of ESF support in Poland and its regions presented in the article concerns the already completed periods 2004-2006, 2007-2013, 2020-2014 and the ongoing perspective 2021-2027. The current perspective is unique, because here the instrument of support in the field of social areas is the ESF+ fund. Support for the social sphere has been and is being carried out on the basis of strategic and program documents that reflect the needs and areas requiring intervention. The socio-economic reality changed in the following years, and the instruments of support also changed. This is illustrated by the establishment of the ESF+ fund by the EU.
Originality/value: The article is one of the first summaries of the areas of intervention of the new ESF+ fund in Poland in the current EU budget perspective (2021-2027) in the context of the experience of Polish and its regions since accession to the EU.
Keywords: EU structural funds, European Social Fund, European Social Fund PLUS.
Category of the paper: research paper, viewpoint.

1. Introduction

The European Social Fund (ESF), along with the European Regional Development Fund (ERDF), is one of the two most important structural funds of the European Union. The main areas to be supported by the fund are the labour market, the fight against poverty and the quality of human capital. During the existence of the ESF, it has evolved, keeping up with the ever-changing socio-economic reality. This was reflected in subsequent strategic and programme documents conditioning the use of structural funds in subsequent EU budget perspectives.

Poland and its regions, when they joined the EU in 2004, became a beneficiary of the Structural Funds. In subsequent financial perspectives, strategic and program documents were created, indicating the most important areas of structural policy support. The tools for their implementation were operational programmes, both of a national and regional nature

In 2021, a fund was created aimed at the social sphere, namely the ESF+ (ESF PLUS). It replaced the ESF, but without the slightest doubt it is a continuation of support for the most important problem areas in the social sphere. The article presents an overview and evaluation of the areas of intervention of the ESF (2004-2020) and the ESF+ (2021-2027) in Poland.

2. Evolution of the ESF towards the ESF+

The European Social Fund (ESF), along with the European Regional Development Fund (ERDF), was one of the two most important structural funds of the European Union. The main areas to be supported under the fund were the labour market, the fight against poverty and the quality of human capital (Poteralski, 2021).

The European Social Fund was created to improve the employability of workers within the internal market and thus contribute to raising the standard of living, which in turn is one of the fundamental objectives of the European Union's cohesion policy. One of the objectives of ESF-funded support and programmes is to adapt workers to changes in industry and production systems, especially through vocational training and retraining (Jarmołowicz, Knapińska, 2005).

The European Social Fund was created in 1957, and at the time of its establishment, only two types of assistance were assigned to its tasks: facilitating the employment of workers and supporting the professional and spatial mobility of the workforce within the territory of the Communities (Poteralski, 2024).

At the time of its creation, the ESF had only two types of assistance assigned to its tasks: facilitating the employment of workers and supporting the professional and spatial mobility of workers within the Community. The fund was intended to support activities aimed at effective re-employment of workers through vocational training and assistance with resettlement.

In addition, its resources are intended to provide assistance to workers whose employment has been reduced or suspended as a result of structural changes in production systems (industrial conversion). These were allowances designed to maintain the same level of wages until the employee was fully employed again. Support for vocational training was provided only in a situation where the unemployed person could not find a job other than the one in the new profession and at the same time in the last six months he was employed in a new profession (in which he had just been trained). Similar conditions had to be met with regard to the co-financing of labour mobility. Support could be granted if the unemployed person was forced to change their place of residence (within the Community) and was employed in a new place for at least half a year (Harasimowicz, 2022).

Analysing the areas of ESF support in the long history of its operation, it should be noted that this fund has evolved and undergone numerous reforms to respond to the changing realities of the labour market and the social sphere of the Community's functioning.

Until 2020, this fund functioned under the name of the European Social Fund, while on the threshold of the next financial perspective (2021-2027) there is talk of a new version of it, namely the European Social Fund "PLUS" (ESF+) (Poteralski, 2024).

The most important source concerning the assumptions, functioning and areas of support of the European Social Fund Plus is Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021.

The regulation refers to the European Pillar of Social Rights, proclaimed on 17 November 2017, as a response to societal challenges in Europe. The main rules, 20 in number, have been divided into 3 categories:

- equal opportunities and access to employment,
- fair working conditions,
- social protection and inclusion.

Further in the document, it is indicated that the principles of the pillar of social affairs should guide the activities carried out under the European Social Fund Plus. To this end, the ESF+ should support investment in people and systems in the policy areas of employment, education and social inclusion, thereby promoting economic, territorial and social cohesion, as enshrined in the Treaty on the Functioning of the EU (Official Journal of the EU, 2021, p. 21).

In order to streamline and simplify the funding system and create additional opportunities for synergies through integrated funding approaches, it was envisaged to include in the ESF+ actions that were supported by the Fund for European Aid to the Most Deprived and the European Union Programme for Employment and Social Innovation (Official Journal of the EU, 2021, p. 23).

The ESF+ should aim to support employment through active interventions for the integration and reintegration into the labour market, in particular young people, in particular through the implementation of the reinforced Youth Guarantee, the long-term unemployed, disadvantaged groups in the labour market and the inactive, as well as through the promotion

of self-employment and the social economy. The objective of the ESF+ should be to improve the functioning of labour markets by supporting the modernisation of labour market institutions, such as public employment services, in order to improve their capacity to provide intensive, targeted guidance and counselling services during the job-search and transition to employment, as well as their ability to stimulate labour mobility. The ESF+ should support the balanced participation of men and women in the labour market through measures aimed at, inter alia, equal working conditions, a better work-life balance and better access to childcare, including early childhood education and care. The ESF+ should also aim to ensure a healthy and well-adapted working environment in order to respond more effectively to health risks related to changing forms of work and to the needs of an ageing workforce (Official Journal of the EU, 2021, p. 24).

3. Areas of ESF support in Poland in the years 2004-2020

The use of funds under the EU Structural Funds in the next budget perspectives required the creation and agreement with the European Commission of a number of strategic and programme documents, both at the Community level and at the national and regional level. However, it can be assumed that in Polish conditions, the most important strategic documents at the national level were, respectively:

- in the years 2004-2006: National Development Plan for the years 2004-2006,
- in the years 2007-2013: National Strategic Reference Framework (National Cohesion Strategy),
- in the years 2014-2020: Partnership Agreement.

These documents constituted m.in. A synthetic approach to problem areas, defined priorities and areas of support, indicated operational programmes, tools and institutions that were responsible for planning, implementing and managing these programmes. Each of these documents formulates a headline objective and specific objectives to support the achievement of the objectives of cohesion policy support for the forecast budgetary period. These assumptions were the result of other strategic documents, setting directions and priorities for development for the coming years, both at the Community, national and regional level. They were also the subject of negotiations between the Polish authorities and the European Commission (Poteralski, 2023).

Table 1 presents the main objectives of the subsequent national strategic documents in the 2004-2006, 2007-2013 and 2014-2020 perspectives, as well as the specific objectives within the competence of the ESF.

Table 1.
Thematic objectives within the competence of the ESF in Poland against the background of the main objectives in the years 2004-2020

Perspective 2004-2006
Main objective of the National Development Plan
Developing a competitive economy based on knowledge and entrepreneurship, capable of long-term, harmonious development, ensuring employment growth and improving social, economic and spatial cohesion with the European Union at regional and national level
Specific objectives for ESF support areas
• Increasing employment and education. • Supporting the participation in development and modernization processes of all regions and social groups in Poland
Perspective 2007-2013
Main objective of the National Strategic Reference Framework
Creating conditions for the growth of competitiveness of the knowledge-based economy and entrepreneurship ensuring employment growth and increases in the level of social, economic and spatial cohesion
Specific objectives for ESF support areas
• Improving the quality of functioning of public institutions and developing partnership mechanisms. • Improving the quality of human capital and increasing social cohesion
Perspective 2014-2020
Main Objective of the Partnership Agreement
Increasing the competitiveness of the economy, improving social and territorial cohesion and improving the efficiency of public administration (increasing the efficiency and effectiveness of the state
Specific objectives for ESF support areas
• Better competences of economic staff. • More efficient use of resources in the labour market. • Increasing employability for people affected or at risk of poverty and social exclusion. • Reducing the risk of social exclusion caused by disparities in access to services. • Inclusion of inhabited communities in peripheral and degraded areas

Source: own elaboration based on: Poland. National Development Plan 2004-2006, Council of Ministers, Warsaw 2003, pp. 63-64; National Strategic Reference Framework (National Cohesion Strategy), Ministry of Regional Development, Warsaw 2007, pp. 40-42; Programming of the Financial Perspective 2014-2020. Partnership Agreement, Ministry of Development, Warsaw 2015, pp. 14-17.

Analysing the provisions of the basic strategic documents conditioning the use of funds from the Structural Funds in Poland in subsequent budget perspectives, it can be noted that in the area of the main objectives they did not change significantly in the analysed period. In all three periods, "increasing the competitiveness of the economy" was mentioned first. It also pointed to "improving social and territorial cohesion".

On the other hand, in the case of formulating specific goals, it can be noted that in the first of the analyzed periods they were quite general and largely referred to the macroeconomic and national dimension (Poteralski, 2023).

In turn, in the subsequent EU financial perspectives, the number of specific objectives relating to the areas of ESF intervention increased. They were also accompanied by objectives that were areas of complementary support from the ERDF and the ESF. These included "construction and modernization of technical and social infrastructure, which is of fundamental importance for the economy" and "increasing the competitiveness of Polish regions and counteracting their social, economic and spatial marginalization" in 2007-2013, as well as "increasing the use of ICT in the economy and society" in the 2014-2020 perspective.

National strategic documents, defining the conditions for the use of funds from the Structural Funds in Poland for the next budget perspectives of the European Union, also indicated the instruments thanks to which this was possible. These included operational programmes. Each of them served to support specific areas of EU intervention. Table 2 presents the operational programmes that are instruments of ESF support in Poland in the years 2004-2020.

Table 2.
Involvement of the ESF in operational programmes in Poland in the years 2004-2020

Perspective 2004-2006	
Operational programme	**Characteristics of the program**
Sectoral Operational Programme Human Resources Development (SPO RZL)	• a single-fund programme (ESF) of a nationwide nature
Integrated Operational Programme for Regional Development (ZPORR)	• nationwide character, but partially implemented at the level of regions (voivodeships), • a two-fund programme (ERDF and ESF), • in certain areas of ESF intervention, complementary to the SPO RZL
Perspective 2007-2013	
Operational programme	**Characteristics of the program**
Human Capital Operational Programme (PO KL)	• single-fund programme (ESF), • the only operational programme with ESF involvement in the years 2007-2013, • the programme includes both the so-called nationwide priorities (national component) and regional priorities (regional component)
Perspective 2014-2020	
Operational programme	**Characteristics of the program**
Operational Programme Knowledge Education Development (PO WER)	• single-fund programme (ESF), • nationwide program
Regional Operational Programmes (RPO)	• 16 dual-fund programmes (ERDF and ESF), in the ESF area complementary to POWER

Source: Poteralski, 2024, pp. 350- 351.

As the table shows, the system of implementation and management of ESF funds in Poland has changed in the analysed period. The first, the shortest perspective for Polish and its regions, was characterized by the operation of two operational programmes. Both were nationwide, but the ZPORR was more oriented towards implementing and solving problems at the regional level. On the other hand, in the 2007-2013 perspective, there was only 1 operational programme under the competence of the ESF. It was the Human Capital Operational Programme. However, it consisted of priorities defined as national and priorities in the so-called regional component. It seems that a much better practice was to create one nationwide program in the perspective of 2014-2020, the Operational Program Knowledge Education Development and 16 regional operational programs (RPOs). This was to enable better adjustment of the areas of intervention to the needs of specific voivodeships (regions).

4. ESF PLUS in the perspective of 2021-2027 in Poland

The financial perspective 2021-2027 is the first EU budget period in which the funds of the new fund, which is the ESF+, are available. Changes in the priorities of the new fund had to be reflected at all levels of implementation of the Structural Funds, from the level of the European Commission, through the national level, to the regional level. Ultimately, the reform of the Social Fund will affect the possibilities and conditions for the implementation of specific projects by beneficiaries entitled to submit applications for co-financing of their projects.

The changes therefore had to be visible from a strategic perspective to the level of management of the implementation of the ESF+ at national and regional level. The most important document determining the use of funds from the Structural Funds in Poland and its individual regions in the 2021-2027 perspective is the Partnership Agreement for 2021-2027. Among other things, this document sets out the priorities and areas of support for the ESF+.

Work on the content of the document, which de facto means the start of negotiations with the European Commission, began in the summer of 2020. As a consequence, Poland completed the negotiations in 2022, i.e. almost two years after the formal start of the perspective, although some programs later required technical corrections (IDEA Institute, 2025).

Table 3 shows which areas are envisaged for support, under the so-called Policy Objective 4 (PO4), which refers mainly to the competences of the ESF+.

Table 3.
EU Policy Objectives (PO) and areas of support under the ESF in Poland in the perspective of 2021-2027

Perspective 2004-2006
“A more social Europe” (PO4)
better use of human capital in the labour market, improving its quality and increasing the level of social cohesion and the availability of social and health services provided
Areas of support under PO4
• labour market, human resources, • education and competences, • inclusion and social inclusion, • health care, including long-term health care.

Source: own elaboration based on the Partnership Agreement for the Implementation of Cohesion Policy 2021-2027 in Poland, (2022), Ministry of Funds and Regional Policy, Warsaw, pp. 46-78; European Funds for Social Development Programme 2021-2027 adopted by the European Commission – version effective from 03 June 2025, Ministry of Funds and Regional Policy, www.rozwojspoleczny.gov.pl, (download date: 09.03.2026).

The Partnership Agreement for 2021-2027 contained an in-depth analysis of the most important problem areas, defined for Policy Objective 4, formulated as "Better use of human capital in the labour market, improving the quality and increasing social cohesion and accessibility of social and health services provided".

The first of them was the labor market and human resources. According to the document, the most important challenges in this area in the short term will be the continuation of measures to stabilise the situation on the labour market with the use of ESF+ funds, which will contribute to reducing the effects of the economic slowdown caused by the COVID-19 pandemic, as well as support and use of the potential of Ukrainian citizens under temporary protection in Poland due to the armed conflict in Ukraine. In the long term, it will be important to respond to the challenges identified even before the COVID-19 pandemic (Partnership Agreement, 2022, pp. 46-47).

In the area of education and competences, the most important challenges for Polish are: raising the level of competences and qualifications, increasing participation in forms of lifelong learning and better adapting education and training systems, including vocational ones, to the needs of the labour market and supporting educational infrastructure. The digital transformation and the transformation towards a green economy require the introduction of education on a larger scale that responds to the needs of the modern economy (Partnership Agreement, 2022, p. 52).

An extremely important element of ESF+ intervention in Poland in the years 2021-2027 is the issue of inclusion and social inclusion. Here, the main problem areas include the threat of poverty or social exclusion, which, although decreasing in the following years, nevertheless shows great regional and urban-rural diversity. Other priorities of ESF+ support in Poland in 2021-2027 are to support social economy entities at the regional level. It is also planned to support such groups as people with disabilities, national minorities, or people in a homelessness crisis (Partnership Agreement, 2022, pp. 60-67).

The last priority of ESF+ support in Poland in the years 2021-2027 is healthcare. In particular, it is expected to improve the accessibility, effectiveness, quality and resilience of the health care system in response to the needs resulting from epidemiological and demographic trends and crisis situations. The intervention is to consist mainly in the implementation of measures resulting in improving the quality and availability of health services and long-term care, taking into account territorial differentiation and improving the efficiency of medical services (Partnership Agreement, 2022, p. 68).

An important feature of the functioning of the Structural Funds, especially the ESF+ and the ERDF, is their mutual complementarity, which is also reflected in the complementarity of support instruments, in the form of priorities and activities of operational programmes. Therefore, the implementation of PO4 from both funds is expected to contribute to building a stronger social economy and to the transition to a knowledge-based economy. Therefore, it is important to transform towards the development of a digital society, lifelong learning that maintains good health. The aim is to ensure a high level of employment, education and training, healthcare, social inclusion and active participation in society. The activities will contribute to strengthening the following systems: healthcare, childcare for children up to 3 years of age,

education, labour market institutions and social assistance, and making them more adapted and resilient to crisis situations (Partnership Agreement, 2022, pp. 117-118).

Table 4.
Involvement of the ESF in operational programmes in Poland in the perspective of 2021-2027

Perspective 2021-2027	
Operational programme	**Characteristics of the program**
European Funds for Social Development 2021-2027 (FERS)	• single-fund programme (ESF), • nationwide program
16 Regional Operational Programmes	• 16 programmes of a dual or triple fund nature (ERDF, ESF+ and Just Transition Fund), in the area of ESF+ complementary to FERS

Source: own elaboration based on the Partnership Agreement for the Implementation of Cohesion Policy 2021-2027 in Poland, (2022), Ministry of Funds and Regional Policy, Warsaw, pp. 78, 197-205.

The system of implementation and management of ESF+ funds in Poland and its regions in the years 2021-2027 in the context of the relevant operational programmes is very similar to that of the previous financial perspective. It is presented in Table 4. In the period 2021-2027, the implementation of one nationwide operational programme and 16 operational programmes of a regional nature are envisaged.

5. Conclusion

The presence of Poland as a beneficiary of EU structural funds for over twenty years is a time when it has become possible to develop tools, methods, and especially procedures in planning, effective management and implementation of support instruments. And although the instruments of cohesion policy are precisely defined by the rules at the level of Brussels, each country and region must develop a model for the effective deployment and use of available support.

The management of structural policy implementation at the level of countries and regions is closely correlated with the guidelines on areas of support, regulated at the level of specific structural funds. One of them is the European Social Fund, established in 1957. As it evolved, corresponding to the changing socio-economic reality of Europe's regions, the priorities and areas of support in the regions eligible for this aid changed.

In 2021, the ESF+ fund was created, which is a continuation of the achievements and long history of the ESF. At the Polish level, this has been reflected in the most important areas of support for the social sphere, through such instruments as the nationwide European Funds for Social Development programme and 16 regional programmes.

It should be emphasized that in 2004 the Polish administration had to take up a huge challenge related to the launch and implementation of all necessary mechanisms for programming, managing, implementing and monitoring the use of funds from the Structural

Funds, including the ESF. This process, although agreed in the EU guidelines at the Brussels level, had to meet the specific needs at the level of Polish and its individual regions. This process should be assessed very positively. Undoubtedly, effective mechanisms and instruments have been implemented, mainly in the form of operational programmes, which enabled the effective use of ESF funds in Poland.

However, it should be remembered that in the following years, the ESF also evolved, as mentioned in this article, towards the ESF PLUS. This was mainly about some improvements and the creation of a more coherent tool at the Brussels level, which in turn would improve the implementation of the policy of support for social areas in individual regions. The coming years, ending the 2021-2027 perspective, will allow for the formulation of the first and more in-depth conclusions on the operation of the ESF in the reformed formula.

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