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NATIONAL REPORTS ON THE IMPLEMENTATION AND IMPACT OF ERASMUS+

GUIDANCE NOTE

1. INTRODUCTION

Article 24(3) of the Erasmus+ Regulation¹ requires the Member States to submit to the Commission, by 31 May 2024, a report on the implementation and the impact of the programme in their respective territories. In line with Article 19(2) of the same Regulation, the third countries associated to the programme have to fulfil all the obligations which this Regulation imposes on Member States. Therefore, all 33 countries participating in the Erasmus+ programme (hereunder ‘participating countries’) have to submit a national report.

This note provides guidance on the planning, scope, methodology and content of the national reports and sets their minimum framework in order to ensure a sufficient level of consistency and comparability. The guidance leaves the necessary autonomy to the National Authorities to define the appropriate methodology for their national report, adapted to their differing levels of available human and financial resources.

2. BACKGROUND

The Commission is required by Articles 24(2) and 24(6) of the Erasmus+ Regulation to submit an evaluation report to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions by 31 December 2024. In line with Article 24(2) of the Regulation, the evaluation will both include the interim evaluation of the Erasmus+ programme 2021-2027 and the final evaluation of the Erasmus+ programme 2014-2020. As such, the evaluation will cover actions in all sectors/fields supported by the programme for the period 2014-2023 in all participating countries. The call for evidence² published on the *Have Your Say* web portal provides more details on the purpose, scope and methodology of the evaluation. The Commission will contract an independent contractor to carry out the support work for the evaluation.

¹ Regulation (EU) 2021/817 of the European Parliament and of the Council of 20 May 2021 establishing Erasmus+: the Union Programme for education and training, youth and sport and repealing Regulation (EU) No 1288/2013 (OJ L189/1, 28.5.2021): EUR-Lex - 32021R0817 - EN - EUR-Lex (europa.eu).

² [Erasmus+ 2021-27 interim evaluation & Erasmus+ 2014-20 final evaluation \(europa.eu\)](https://ec.europa.eu/info/departments/education-youth-sport-and-culture_en)

The contractor will have to ensure that their evaluation methodology collects the views of all major stakeholders with an appropriate geographical coverage, and provides objective replies to the evaluation questions, properly covering all types of actions of the programme, regardless of the implementing bodies and management modes, across:

- the different **fields and sectors**: education and training (including higher education, vocational education and training, school education, adult education), youth and sport;
- the different **key actions** (learning mobility, cooperation among organisations and institutions, support to policy development and cooperation) and **Jean Monnet actions**;
- the different **target levels**: at individual level (learners and practitioners), at organisational/institutional level and at systemic/policy level;
- the **four horizontal priorities** encompassing the different programme actions:
 - inclusion and diversity;
 - digital transformation;
 - environment and fight against climate change;
 - participation in democratic life, common values and civic engagement.

The national reports will complement the evaluation conducted by the external contractor and feed into the Commission's overall evaluation.

3. NATIONAL REPORTS ON THE IMPLEMENTATION AND IMPACT OF ERASMUS+

The national reports on the implementation and impact of Erasmus+ can provide essential supplementary information to the evaluation process. Compared with the evaluation conducted by the external contractor for the Commission, the national reports can strengthen the:

- **National perspective**: Participating countries can best identify national specificities or peculiarities in the implementation or impact of the programme, which are harder to capture fully for the Commission's evaluation contractor. Participating countries are also best placed to assess the degree to which the programme is successful in achieving its objectives of having an impact on national policies, such as, for example, the modernisation of education and training systems or the development of evidence-based youth policy.
- **Perspective of beneficiaries and participants**: Participating countries (and in particular National Agencies) stand much closer to the beneficiaries and participants than the Commission. They can, therefore, better capture their direct feedback on the programme. This can be a useful complement to the open and targeted consultations the Commission's contractor will conduct.
- **Implementation perspective**: Around 80% of Erasmus+ budget is being implemented under indirect management through the National Agencies in the participating countries. Based on their practical experience, they are therefore very well placed to assess implementation issues.

In order to provide useful inputs to the overall evaluation process, the national reports must be supported by evidence and practical examples to illustrate specific comments made in the replies to the evaluation questions.

3.1. Methodology

The responsibility for the preparation of the national reports lies with the National Authorities. They have the choice to collect, analyse and interpret data themselves or to outsource all, or parts, of the task to an external body. In general, National Authorities have the freedom to choose the methodological approach and will be invited to explain it in their report.

Each participating country will submit **one national report**. In case there are multiple National Authorities in a country, these will have to cooperate to deliver a single integrated national report, covering all programme fields.

National Authorities are each asked to nominate a **coordinator for the national report** who will liaise with the Commission.

The Commission plans to organise a workshop or webinar for the national coordinators in order to further clarify the expected content of the national reports and to exchange experiences between participating countries. An invitation will be sent in due time to all national coordinators once they are nominated by their respective National Authorities.

National Agencies are the main actors in the implementation of Erasmus+ at national level and their contribution to this exercise is therefore essential. The services of National Agencies may be invited by National Authorities to help with gathering the data and sharing their experience. They can also provide their comments and opinions to their National Authority during the establishment of the national report.

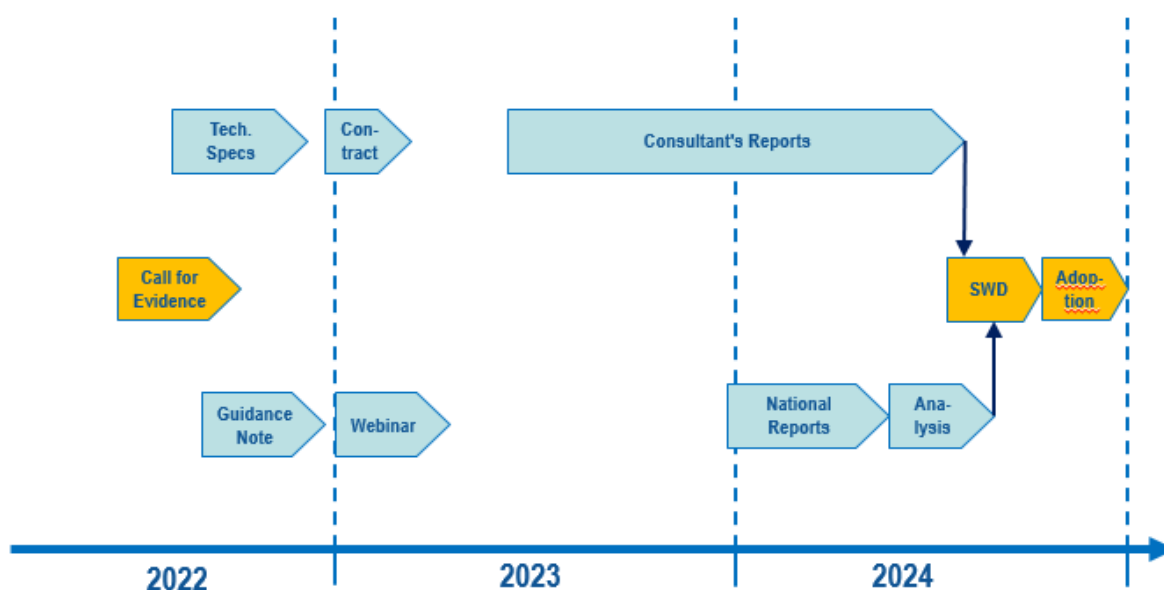
3.2. Planning

The chart below presents the timing and interaction of the Erasmus+ evaluation and the national reports. A more detailed timetable is presented in **Annex 1**.

The call for evidence for the evaluation was published on 28 July 2022 and was available during more than six weeks for feedback from citizens and stakeholders (it was closed on 12 September). The requests for services were sent to the potential contractors on 4 November 2022 with a deadline for the submission of the offers on 5 December 2022. The selection process of the external contractor has started in December 2022 in view of enabling the selected contractor to start the work as soon as the contract is signed early 2023. The contractor should deliver the final evaluation report by May 2024. This will allow the Commission to describe the results of the evaluation report in its staff working document on the Erasmus+ evaluation and, in case the evaluation is selected for scrutiny, to submit it to the Regulatory Scrutiny Board³ for internal quality assurance, before it is approved through an inter-service consultation mechanism by the Commission and delivered to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions by the end of 2024.

³ The Regulatory Scrutiny Board (RSB or Board) is an independent body within the Commission that scrutinises the quality of impact assessments, fitness checks and selected evaluations. The list of selected evaluations that the Board wishes to scrutinise is notified to DGs in the second quarter of the year (T) and concern evaluations and fitness checks to be finalised in next year (T+1). Better Regulation Tool #3: [br toolbox - june 2022 - chapter 1.pdf \(europa.eu\)](#).

Chart 1: Timeline Erasmus+ evaluation and national reports



The Erasmus+ Regulation requires the delivery of the national reports to the Commission by 31 May 2024. However, the **National Authorities are highly encouraged to submit their reports** as soon as possible **during the first quarter of 2024** to allow the Commission’s external contractor to carefully analyse them and prepare a synthesis report by July 2024. The contractor’s analysis will include the extent to which the assessments of the Member States and third countries associated to the programme reflect and are in line with the contractor's previously finalised evaluation findings and judgments. It will also identify any additional findings in the national reports. Based on this analysis, the Commission should be able to integrate the main findings and conclusions of the national reports in its report and staff working document on the Erasmus+ evaluation. The contractor's synthesis of the national reports will be presented in a separate document and attached as annex to the staff working document.

3.3. Content

The national reports should represent an important input for the evaluation of decentralised actions of Erasmus+. In order to ensure that national reports can be used for this purpose, they need to be sufficiently consistent and comparable across all participating countries. This note, therefore, puts forward a common scope and structure for the reports and a common set of questions to be answered.

3.3.1. Scope

National reports should give the national view on the implementation and impact of Erasmus+, including its strengths and weaknesses, lessons learned and best practices, as well as the analysis of national results achieved. Taking into account the intervention logic of the programme (see Annexes 3 and 4), they should focus on both quantitative and qualitative outputs and results and compare them with objectives as defined in the Erasmus+ Regulation.

As it is too early to observe some longer-term effects of Erasmus+ 2021-2027, the results and impacts of the predecessor programme (2014-2020) should be analysed as proxies for the effects of actions that are continued in a similar way under the Erasmus+ programme 2021-2027. In those cases where it is particularly relevant to also analyse longer-term effects of the predecessor programme, the questions will explicitly mention the Erasmus+ programme 2014-2020.

The national reports should cover the actions which are being implemented under indirect management by the National Agencies. The National Authorities are also invited to comment on the implementation and effects of the actions implemented under direct management by the European Education and Culture Executive Agency (EACEA) in their country, when relevant.

3.3.2. Structure

The **standard content** of national reports should be the following:

- Cover page (title, country, author/s, contact details, date);
- Table of contents;
- Executive summary (max. 2 pages);
- Methodology for the preparation of the national report, role of actors;
- Answers to standard questions, as well as conclusions and suggestions for improvements to Erasmus+ 2021-2027 and for a future programme (max. 30 pages);
- Annexes: more elaborate justification, explanations or statistics for arguments in the main document.

In order to facilitate their swift analysis and integration in the Commission's evaluation report, the national reports will preferably be drafted in **English, French or German**.

3.3.3. Questions to be answered

The set of standard questions is organised following the structure of the five evaluation criteria to be examined in line with the Commission's Better Regulation Guidelines⁴: **effectiveness, efficiency, relevance, coherence, European added value**. The general elements and concepts of the intervention logic, which forms the basis for the evaluation, are explained in **Annex 2**. The intervention logics of both Erasmus+ 2014-2020 and Erasmus+ 2021-2027 are included respectively in **Annex 3** and **Annex 4**. A table highlighting the changes in actions in the Erasmus+ programme 2021-2027 compared to its predecessor programme (2014-2020) can be found in **Annex 5**.

Questions should be answered from the national perspective. Identified strengths and weaknesses should be supported by evidence and specific examples at national level where relevant.

⁴ See Better Regulation Tool #47: [br_toolbox-nov_2021_en_0.pdf \(europa.eu\)](https://european-council.europa.eu/media/e3000000/1/7/1/br_toolbox-nov_2021_en_0.pdf) and definitions in Annex 2.

National Authorities **should address each of the five evaluation criteria** mentioned above **but can choose to concentrate on those questions where they consider having the most useful input to the evaluation exercise**, based on their particular experience or analysis. Questions where National Authorities consider that they cannot make a particular contribution to the assessment or analysis, can be skipped, in which case a brief explanation on the reasons to do so should be provided.

Comments can be made both at general level of the programme and concerning specific actions/fields⁵, where these deviate from the general remarks. Where it is considered most relevant, questions ask specifically about differences between actions and/or fields. However, National Authorities are welcome to differentiate their answers across actions and fields to other questions as well.

Where relevant, regional specificities can also be highlighted in the replies to the questions. In these cases, the underlying factors behind the regional differences could provide additional insight into the functioning of the programme.

For a number of questions, in particular on effectiveness and European added value, the answers should also take into account the assessment of the long-term effects of the predecessor programme, as there will not yet be sufficient information on the long-term performance of the current programme. The wording of the relevant questions makes clear where this is the case.

⁵ The actions supported under Erasmus+ 2021-2027 are defined in the legal base under chapter II in the field of **education and training** (including higher education, vocational education and training, school education and adult education) and **Jean Monnet actions**, chapter III in the field of **youth** and chapter IV in the field of **sport**. The description of those actions is included in Annex I to the legal base.

EVALUATION QUESTIONS

Effectiveness

- To what extent have the various programme fields both within Erasmus+ 2021-2027 and Erasmus+ 2014-2020 delivered the expected outputs, results and impacts in your country? What negative and positive factors seem to be influencing outputs, results and impacts? Do you consider that certain actions are more effective than others? Are there differences across fields? What are the determining factors for making these actions of the programme more effective?
- What are the results and long-term impact of Erasmus+ 2014-2020 in your country? We are interested in the impact of all actions/elements of Erasmus+ 2014-2020, and with special attention to those actions/elements that are continued in Erasmus+ 2021-2027. We are also interested in the impact of actions/elements that have been discontinued to the extent that it might help design the future programme. What is your assessment of the quality of applications received in your country, and what measures could be taken to improve the quality of applications and awarded projects in your country taking into account the doubling of budget for the 2021-2027 programme cycle?
- Please identify, describe and quantify (if possible) the spill-over effects between various actions (clusters of actions) of Erasmus+ 2021-2027 in your country, as described in the intervention logic.
- To what extent has Erasmus+ 2021-2027 had a transformative effect in your country on systems, values and norms, in particular with respect to the four horizontal priorities of the programme: inclusion and diversity – digital transformation – green transition (environment and fight against climate change) – participation in democratic life and civic engagement? Could you identify the horizontal priorities the programme had the highest impact on through its actions?
- What are the differences in impact of Erasmus+ 2021-2027 actions in your country on hard-to-reach groups, people with fewer opportunities or specific disadvantaged groups of the population who traditionally do not engage in transnational or international activities as compared to other groups that benefit from the programme? We are interested in the evaluation of the first effects of the Framework of Inclusion Measures and of the Inclusion and Diversity Strategy on promoting accessibility to funding for a wider range of organisations, and to better reach out to more participants with fewer opportunities.
- To what extent do the actions/activities/projects supported by Erasmus+ 2021-2027 contribute to mainstreaming climate and environment actions and to achieving the climate and environment objectives, including those intended to reduce the environmental impact of the programme, in your country?
- To what extent have the forms of cooperation and the types of actions under Erasmus+ 2021-2027 and Erasmus+ 2014-2020 influenced policy developments in the fields of education and training, youth and sport in your country? Which actions of the programmes are the most effective considering the needs of your country? Are there marked differences between the different fields?
- What specific approaches (such as co-financing, promotion or others) have you taken in order to try to enhance the effects of Erasmus+ 2021-2027 and Erasmus+ 2014-2020 in your country? To what extent have these approaches been effective? Can any particular points for improvement be identified?

- To what extent are the results of Erasmus+ 2021-2027 and Erasmus+ 2014-2020 adequately being disseminated and exploited in your country? Where can you see the possibilities for improvements?
- To what extent are the effects likely to last in your country after the intervention ends, both cumulatively and the level of each implemented grant?
- What if the Erasmus+ programme had not existed? Would the relevant sectors (higher education, school education, adult education, vocational education and training, youth and sport) in your country be supported in the same way and to a comparable extent?
- How did the Covid-19 pandemic impact the implementation of the two generations of the programme in your country, and what was the effect of the measures taken to react to the consequences of the pandemic?
- What was the effect in your country of the measures taken in the frame of the programme implementation to provide a reaction to the consequences of the Russian invasion of Ukraine?

Efficiency

- What is the cost-effectiveness of various actions (clusters of actions) of Erasmus+ 2021-2027 and Erasmus+ 2014-2020 in your country?
- To what extent, compared to the previous programme, is the size of budget appropriate and proportionate to what Erasmus+ 2021-2027 is set out to achieve? To what extent is the distribution of funds across the programme fields and key actions appropriate in relation to their level of effectiveness and utility?
- How efficient is the cooperation between the different actors involved in the implementation and supervision of the programme (Commission services – Erasmus+ Committee – Executive Agency – National Authorities – National Agencies – Independent Audit Bodies – International Organisations⁶) from the point of view of your country, and to what extent does the Commission fulfil its guiding role in the process? How has this changed between the two programming periods? What are the reasons for potential changes? What are the areas for possible improvement in the implementation of Erasmus 2021-2027 or a successor programme?
- To what extent are the measures applied by your National Agency/ies for monitoring and supporting applicants, beneficiaries (including small and newcomer organisations) and participants effective and proportionate? What are the areas for improvement/simplification, considering the need for a smooth and effective implementation of the programme?
- To what extent have simplification measures put in place, such as the system of simplified grants and accreditation system, resulted in a reduction of the administrative burden for National Agencies, programme beneficiaries and participants? Are there differences across actions or fields? What elements of the programme could be changed to further reduce the administrative burden and simplify the programme's management and implementation, without unduly compromising its sound management, results and impact?

⁶ Some (limited) actions of the programme are implemented under indirect management by pillar assessed international organisations (ex: OECD, Council of Europe, etc.). The Pillar Assessment aims to assess the organisation's compliance with the EC's requirements and to guarantee a level of protection of the EU's financial interests equivalent to that required under the Financial Regulations.

- To what extent do the indicators identified for the programme in the Regulation⁷ correspond to the monitoring purposes at national level? How could the overall management and monitoring system be improved?
- To what extent are the new management support tools⁸ consistent with the Erasmus+ programme needs and architecture? Which additional features would you recommend for future developments?
- To what extent have the antifraud measures allowed for the prevention and timely detection of fraud in your country?

Relevance

- To what extent do the Erasmus+ 2021-2027 objectives as set up in Article 3.1 and 3.2 of the Erasmus+ regulation, in link with the EU policy agendas in the fields of education and training, youth and sport, continue to address the needs or challenges they are meant to help with? Are these needs or challenges (still) relevant in the context of your country? Have the needs or challenges evolved in such a way that the objectives of Erasmus+ 2021-2027 or its successor programme need to be adjusted?
- To what extent are the needs of different stakeholders and sectors in your country addressed by the Erasmus+ 2021-2027 objectives? How successful is the programme in attracting and reaching target audiences and groups within different fields of the programme's scope? How well is the Erasmus+ programme known to the education and training, youth and sport communities in your country? In case some target groups are not sufficiently reached, what factors are limiting their access and what actions could be taken to remedy this? What are the reasons of limited participation of certain target groups? Are there target groups who chose not to participate or are there always external factors preventing them?
- To what extent is the design of Erasmus+ 2021-2027 oriented and adapted towards the hard-to-reach groups, people with fewer opportunities or specific disadvantaged groups of the population who traditionally do not engage in transnational or international activities as compared to other groups that benefit from the programme? In case some target groups are not sufficiently reached in your country, what factors are limiting their access and what actions could be taken to remedy this?
- To what extent are the needs and challenges linked to Europe's green and digital transitions reflected in the actions/activities of Erasmus+ 2021-2027?
- What is the relevance of Erasmus+ 2021-2027 compared to the relevance of Erasmus+ 2014-2020 from the point of view of your country? Has it been improved in the new programme generation?

⁷ To be completed during the first half of 2023 by the Erasmus+ monitoring and evaluation framework.

⁸ A new IT landscape has been rolled out for the new programme generation replacing the previous tools to adapt to up-to-date technology and new needs. .

Coherence

- To what extent are the objectives of different programme fields within Erasmus+ 2021-2027 consistent and mutually supportive? What evidence exists of cooperation between the different programme fields, including those managed by different National Agencies, and actions? How well do different actions work together? To what extent there exist inconsistencies, overlaps, or other disadvantageous issues between the programme fields and how are they dealt with?
- To what extent is Erasmus+ 2021-2027 coherent with other national or regional programmes, other forms of EU cooperation (bilateral programmes) as well as international programmes with similar objectives available in your country? Can you identify any inconsistencies, overlaps or other disadvantageous issues with other programmes?
- To what extent has Erasmus+ 2021-2027 proved to be complementary to other national and international programmes available in your country in the fields of education and training, youth and sport? To what extent is Erasmus+ 2021-2027 building effective synergies or interactions with other programmes at national or regional level and other EU or international programmes with complementary objectives available in your country? What evidence exist of synergies and complementarities between Erasmus+ and other EU, national or regional programmes? Can you identify any inconsistencies, overlaps or other disadvantageous issues with other programmes? Can you compare with the synergies and complementarities developed in the previous Erasmus+ programme 2014-2020?
- What is the coherence of Erasmus+ 2021-2027 compared to the coherence of Erasmus+ 2014-2020 from the point of view of your country? Has it been improved in the new programme generation?

European added value

- What is the additional value and benefit resulting from EU activities, compared to what could be achieved by similar actions initiated only at regional or national levels in your country? What does Erasmus+ 2021-2027 offer in addition to other education and training support schemes available at regional or national levels in your country? What possibilities do you see to adjust Erasmus+ or its successor programme in order to increase its European added value?
- To what extent does the Erasmus+ programme contribute to developing knowledge in European integration matters, to raising awareness about the EU common values and to fostering a European sense of belonging in your country?
- To what extent does Erasmus+ 2021-2027 promote cooperation between Member States and third countries associated to the programme? And between these countries and third countries not associated to the programme?
- What is the benefit and added value of Erasmus+ 2021-2027 and Erasmus+ 2014-2020 for individuals or organisations participating to the programme compared to non-participants in your country?
- To what extent are the results of Erasmus+ 2021-2027 and Erasmus+ 2014-2020 sustainable beyond the projects duration in your country?
- What would be the most likely consequences in your country if the Erasmus+ programme were possibly to be discontinued?