

“European Structural and Investments Funds - Focus on Health”

2023



This presentation is part of the action “NFP4Health” which has received funding from the European Union’s Health Programme (2014-2020) under grant agreement No 101035965.



Agenda

11.00 - 11.10

Introduction

11.10 - 11.30

Introduction to the Cohesion Policies

11.30 - 11.45

The new Programming Period 2021-2027 of the European Structural and Investments Funds

11.45 - 12.10

European Structural and Investments Funds – focus on Health and Social Opportunities

12.10 - 12.20

Synergies between shared and direct management funds

12.20 - 12.30

Conclusion



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Introduction to the Cohesion Policies



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Cohesion policy is the **main investment policy** of the European Union.

It offers benefits to all EU regions and cities and supports:

- *Economic growth*
- *Sustainable development*
- *The improvement of citizens' quality of life*



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TITLE XVIII ECONOMIC, SOCIAL AND TERRITORIAL COHESION

Article 174

(Treaty on functioning of European Union)



In order to **promote the harmonious development of the Union as a whole**, the Union develops and continues its action aimed at strengthening its economic, **social and territorial cohesion**. In particular, the Union aims to reduce the gap between the levels of development of the different regions and the backwardness of the least favored regions. Among the regions concerned, particular attention is paid to **rural areas, areas affected by industrial transition and regions with severe and permanent natural or demographic handicaps**, such as the northernmost regions with very low population density and island, cross-border and mountain regions.



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Cohesion Policies: The evolution



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1957-1987

MILESTONES	DESCRIZIONE
1957	Treaty of Rome In the 'preamble' to the 1957 'Treaty of Rome', one finds the will of the founding states of the European Economic Community to ' strengthen the unity of their economies and ensure their harmonious development by reducing the disparities between the different regions and the backwardness of the less favoured ones '. The principle enshrines the need that, in order to ensure a real economic impact of Structural Fund resources, European aid should not replace economic intervention by the Member State, but should be additional and synergetic with it.
1958	Creation of the European Social Fund (ESF) The ESF is aimed at stimulating employment, but there is no real regulatory source, let alone a direct financial instrument for economic cohesion.
1968	The European Commission creates a new Directorate General (DG XVI) with specific competences on the subject, and a 'Regional Policy Committee' is established.



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1988 - 1999

MILESTONES	DESCRIZIONE
1988	Delors I Package The Commission then presented the Council and Parliament with a set of proposals to reform the EU financial system : the 'Delors I Package'. This was finally approved by the European Council in March 1988 and opened the door to an ambitious programme that redefined the priority objectives of the policy. The package strengthens Community action in the areas of the environment, science, technology and transport. The reform leads to a substantial increase in resources, double those used up to that point, and, on a more strictly organisational level , to the creation of a new Directorate-General, DG XXII, responsible for managing the programmes and preparing the reform framework.
1993	Maastricht Treaty <u>The European Community becomes the 'European Union'</u> The Treaty, which marks a new era, reaffirms the importance of economic and social cohesion policy and makes it the EU's main priority by introducing important institutional and political changes.



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MILESTONES	DESCRIZIONE
1993	<p>Delors Package II</p> <p>In fact, the Commission is proposing the 'Delors II Package' for the 1994-1999 programming period, which outlines the financial terms for conducting the activities laid down in Maastricht. Among the various changes the possibility for member states to determine the so-called 'eligibility criteria' of regions receiving funds the establishment of a Cohesion Fund that did not operate under the normal rules of the structural funds. The '93 reform, however, made only modest changes and led to the restoration of national control of some thematic areas that had been lost with the previous 1988 reform.</p>
1997 - 1999	<p>Agenda 2000</p> <p>The next reform took place in 1999 and covered the 2000-2006 programming period. The 'Agenda 2000' package places the simplification of the regulatory structure and decentralisation at the heart of the requirements, in order to remedy the need for effectiveness, transparency and rigour.</p> <p>A clear division of institutional tasks and responsibilities is envisaged: strategic objectives, priority axes and their allocation were to be established at Community level, while detailed programming was to be the sole responsibility of the Member States, which were invited to designate their 'Managing Authorities' for this purpose.</p> <p>Among other novelties, the seven-year duration of the programmes is established and the number of objectives reduced.</p>



MILESTONES	DESCRIZIONE
<p>2000</p>	<p>Lisbon Strategy</p> <p>A new strategic goal is agreed for the EU to support employment, economic reform and social cohesion in the context of a knowledge-based economy: the so-called 'Lisbon 2000 strategy.</p> <p>'The Commission proposed a new regulatory package, which was approved in July 2006. In the new 'architecture', there was the inclusion of planning instruments such as: "Community strategic guidelines" "national strategic frameworks"(NSFs) "operational programmes"(OPs)</p> <p>Investments were concentrated on a limited number of priorities and on three new objectives:</p> <p>"Convergence", "Competitiveness". "Cooperation".</p>



2000 – 2007

MILESTONES	DESCRIZIONE
2007	<p>Lisbon Treaty</p> <p>The latest reform is the 'Lisbon Treaty' of 2007, which introduces the concept of 'territorial cohesion' and places it as the fundamental objective of the EU together with the strengthening of 'economic and social cohesion'.</p> <p>The Lisbon Treaty redesigns the policy of economic, social and territorial cohesion as a common shared space between the Union and the Member States, and also has the merit of introducing a true ordinary legislative procedure with significant decision-making powers for the European Parliament.</p>



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2008 – 2010

MILESTONES	DESCRIZIONE
<p>2010</p>	<p>Europa 2020 Strategy</p> <p>The aim of the Europe 2020 Strategy is an effective relaunch of the internal market for 'smart', 'sustainable' and 'inclusive' growth.</p> <p>This is to be achieved through an increased concentration on certain thematic objectives, in particular 'innovation', 'employment' and 'social inclusion', as well as 'environment' and 'climate change'.</p>



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MILESTONES	DESCRIZIONE
<p>2013</p>	<p><i>Programming Period 2014 - 2020</i></p> <p>The subsequent 2013 reform for the 2014-2020 programming period is thus instrumental in implementing the new Europe 2020 objectives.</p> <p>With the reform, a new 'Common Strategic Framework' is established, and the three objectives of the previous programming period are replaced by the new two of 'investment for growth and jobs' and 'European territorial cooperation'.</p> <p>Among the new features are the 'Partnership Agreements' between the Commission and the Member States, a new classification of European regions receiving funds, and the so-called 'ex ante conditionalities'.</p>



MILESTONES	DESCRIZIONE
<p>2018</p>	<p><i>Programming Period 2021-2027</i></p> <p>In May 2018, the European Commission presented proposals for regulations for cohesion policy for the post-2020 period. One of the main objectives of the reform is to simplify procedures and increase the effectiveness of EU investments.</p> <p>The eleven thematic objectives used in Cohesion Policy 2014-2020 have been replaced by five strategic objectives for the ERDF, ESF+, Cohesion Fund and EMFF:</p> <ul style="list-style-type: none"> • a smarter Europe - innovative and smart economic transformation; • a greener, low-carbon Europe; • a more connected Europe - regional ICT mobility and connectivity; • a more social Europe through the implementation of the European pillar of social rights; • a closer Europe for citizens - sustainable and integrated development of urban, rural and coastal areas through local initiatives.



SINGLE EUROPEAN ACT (1986)

ECONOMIC AND SOCIAL COHESION

"In order to promote the harmonious development of the Community as a whole, the Community shall develop and pursue its action designed to bring about the strengthening of its economic and social cohesion. In particular, the Community shall aim at reducing the gap between the various regions and the backwardness of the less-favored regions."

LISBON TREATY

ECONOMIC, SOCIAL AND TERRITORIAL COHESION

"Among the regions covered, special attention is paid to rural areas, areas affected by industrial transition, and regions with severe and permanent natural or demographic disadvantages, such as the northernmost regions with very low population density and island, cross-border and mountain regions."

With the 2004 Treaty, economic, social and territorial cohesion, was formally assumed among the objectives of the EU.



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PRINCIPLES	DESCRIPTION
Additionality	The principle enshrines the need that, in order to ensure an effective economic impact of Structural Fund resources, European aid should not replace the economic intervention of the member state , but should be additional and synergistic with it.
Focus	Cohesion policy interventions focus in the planning phase on the most relevant needs, and in the programming phase on the most effective measures , through the combined allocation of financial resources among actions, beneficiaries and geographical areas, and the integration of Structural Funds with other available financial instruments.
Programming	Cohesion policy interventions are defined on the basis of a multi-year programming activity negotiated between the region, the member state and the European Commission through the adoption of Programs and the implementation of surveillance and monitoring activities.
Complementarity	The principle establishes the possibility for the European Union to intervene in areas that are not within its exclusive competence if the objectives pursued cannot be achieved by the member state or can be better achieved at the European level.
Partnership	The principle states that the definition, management and evaluation phase of cohesion policy programming should be developed on the basis of consultation between the European Commission, the relevant authorities at national, regional and local levels, and the economic and social partners.



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Objectives

Since the 1988 Reform, cohesion objectives have been translated into:

Regional Objectives:

- the promotion of the development and structural adjustment of regions lagging furthest behind in development, the reconversion of regions affected by industrial decline, the promotion of development in rural areas

objectives with a horizontal character:

- the fight against long-term unemployment,
- the promotion of vocational integration of young people,
- the promotion of the integration of people threatened with exclusion from the labor market,
- The promotion of workers' adaptation to industrial change and the evolution of production systems.

Each programming cycle has declined these general objectives into thematic (in the 2014-20 period) or policy and specific objectives (for the 2021-27 period).



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Cohesion Policy & Structural Funds

Cohesion policy has been promoted and **supported by the European Union since the late 1980s through the Structural Funds**, which finance programs with **shared management** between the Member State and the Commission and require **national co-financing provided**, for the most part, by the National Revolving Fund for the Implementation of Community Policies.

These resources are supplemented at the national level, reflecting the **principle of additionality** to the resources routinely made available to all territories, to enable the most backward areas to bridge delays and development gaps.

Currently, cohesion policy is organized, both at the European and national levels, by **multi-year (7-year) programming cycles**.



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Goals:
Economic, Social and Territorial Cohesion

STRATEGIES

Partnership Agreement

Programming Documents

FUNDS

European
(+ national cofinancing)

Nationals
Rotation Funds

PROGRAMMES

NP – RP - ETC

Customized per Country



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STRATEGIES

The overall strategic framework for each cycle is defined by the overall guidance document, currently called the Partnership Agreement, which frames the programming carried out at the national and regional levels.

This document establishes investment priorities and the articulation of resources into programs.

NATIONAL STRATEGIES, customized per Country

Then there are European and national rules and regulations that define general approach, implementation methods, monitoring, evaluation and transparency.



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The new Programming Period 2021-2027 of the European Structural and Investments Funds



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FUNDS

The main EUROPEAN STRUCTURAL FUNDS that support cohesion policy are:

ERDF

ESF+

JTF (Just Transition Fund)

FC (Cohesion Fund)

European Maritime, Fisheries and Aquaculture Fund (EMFAF)

customized per Country

For example for Italy, the main funds supporting the Cohesion Policy are:

FSC (Fondo Sviluppo e Coesione)

Fondo di Rotazione



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ERDF

- The European Regional Development Fund (ERDF), is the main financial instrument ***for fostering the economic and employment growth of European regions and smoothing out their development disparities and imbalances.***
- The ERDF pursues **two main objectives**, each of which is concretely spelled out in the fund regulations adopted in each programming cycle:
 - the "Investment for Growth and Employment" (IGE) objective, aimed at strengthening the labor market and regional economies, and
 - the European Territorial Cooperation (ETC) objective, aimed at strengthening cross-border, transnational and interregional cooperation within the Union;



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ESF +

The European Social Fund Plus (ESF+), profoundly innovated from the previous 2014-2020 cycle, **is the main European Union (EU) instrument for investing in people, designed to support the implementation of the European Pillar of Social Rights, sustain employment and create an equitable and socially inclusive society.**

It will also provide resources for the recovery of member states' societies and economies after the Coronavirus crisis (Article 162 TFEU).

The ESF+, in its new version, brings together four funding instruments that were separate in the 2014-2020 programming period:

- the former European Social Fund (ESF),
- the Youth Employment Initiative (YEI),
- the Fund for European Aid to the Indigent (FEAD)
- the European Employment and Social Innovation Program (EaSI);



CF

- The Cohesion Fund was established to **provide financial contributions to environmental and trans-European network projects in the field of transport infrastructure** (Article 177 TFEU) in **member states with a gross national income (GNI) per capita of less than 90 percent of the EU-27 average** (in the 2021-2027 programming Bulgaria, Czechia, Estonia, Greece, Croatia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Portugal, Romania, Slovakia, and Slovenia);



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JTF

- The Just Transition Fund(JTF) is a new instrument of Cohesion Policy 2021-2027, the first pillar of the Just Transition Mechanism in the context of the European Green Deal, with the goal of achieving EU climate neutrality by 2050. It supports the specific objective of enabling Regions and People to address the social, employment, economic and environmental impacts of the transition to the EU's 2030 energy and climate goals and a climate-neutral EU economy by 2050, based on the Paris Agreement.
- In order to achieve its goal, the Fund supports investments in areas such as digital connectivity, clean energy technologies, emissions reduction, industrial site rehabilitation, worker retraining, and technical assistance.

https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en



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Objective "INVESTMENT FOR EMPLOYMENT AND GROWTH - IEG" in Member States and Regions.

ERDF

ESF+

CF

JTF

Objective «EUROPEAN TERRITORIAL COOPERATION»
(INTERREG)

ERDF



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Cohesion Policy – Funds and Resources

The strategic direction of cohesion resources for the 2021-2027 cycle-which, similarly to previous programming cycles, are financed by European resources, with mandatory national co-financing associated with them-was defined in coherence with the contents of the National Plan for Recovery and Resilience (NRP).

The resources made available by the European Union, it should be recalled, are additional, never a substitute, to the normal sources of funding for the various policies in the hands of each member state, based on the principle of additionality.



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Cohesion Policy – Funds and Resources



The Cohesion Policy is a concrete expression of the existing solidary relationship between European states and aims to promote economic, social and territorial cohesion, supporting especially the less developed regions.

The package, which governs the European Structural and Investment Funds for the period 2021-2027, has a total value of **€373 billion in current prices** (€330 billion in 2018 prices) corresponding to nearly one-third of the European Union's long-term budget,



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Cohesion Policy – Legal Framework

The EU regulatory framework defining the objectives and financial instruments for intervention for the new 2021-2027 programming cycle is set out in **Regulation (EU) No. 2021/1060** of the European Parliament and of the Council of June 24, 2021, which lays down common provisions on eight European Funds, including those specifically earmarked for cohesion policy.

The rules on individual Cohesion Policy Funds are contained in the following Regulations:

Regulation (EU) 2021/1058 on the European Regional Development Fund (ERDF) and Cohesion Fund (CF),

Regulation (EU) 2021/1057 on the European Social Fund Plus (ESF+),

Regulation (EU) 2021/1056 on the Just Transition Fund (JTF), as well as in

Regulation (EU) 2021/1059 on specific provisions for the European Territorial Cooperation (Interreg) objective supported by the European Regional Development Fund and

external financing instruments **Regulation (EU) 2021/1139** of the European Parliament and of the Council of July 7, 2021 establishing the European Maritime, Fisheries and Aquaculture Fund (EMFF).



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Partnership Agreement

The overall strategic framework for each cycle is defined by the **overall guidance document, currently called the Partnership Agreement**, which frames the programming carried out at the national and regional levels.

This document establishes investment priorities and the articulation of resources into programs.

Then there are European and national rules and regulations that define general approach, implementation methods, monitoring, evaluation and transparency.



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Partnership Agreement

Regulation (EU) 2021/1060

of the European Parliament and of the Council of June 24, 2021 laying down common provisions applicable to the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, the Fund for a Just Transition, the European Maritime, Fisheries and Aquaculture Fund, and the financial rules applicable to those funds and to the Asylum, Migration and Integration Fund, the Internal Security Fund, and the Instrument for Financial Support for Border Management and Visa Policy

EU Reg 1060/2021, so-called Common Provisions Regulation - in **Art.10** paragraph 1 defines the **Partnership Agreement**:

the document, prepared by each Member State and approved by the Commission, which sets out the strategic orientation for programming and arrangements for the effective and efficient use of the ERDF, ESF+, Cohesion Fund, JTF and EAFRD for the period from January 1, 2021 to December 31, 2027.



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Partnership Agreement & Operative Programmes

Partnership Agreement Articles 10 and 13 of CR

The Partnership Agreement is prepared by the member states and presents their overall strategies for using the funds well. The Partnership Agreement is adopted by the European Commission by Community Decision, after a negotiation with the member state, within four months after submission.

Content of the Partnership Agreement

- a) The selected policy objectives and the specific objective of the JTF.
- b) For each objective, a summary of the policy choices and expected results
- c) The indicative financial envelope
- d) The breakdown of financial resources by category of regions
- e) The amounts to be contributed to InvestEU
- f) The list of programs planned under the funds with their preliminary financial allocations
- g) A summary of the actions to be taken by the member state concerned to strengthen its administrative capacity to implement the funds

Operative Programmes Articles 21-25 of CR

The Operational Programs, drawn up in consistency with the Partnership Agreement, are submitted by the member states and are adopted by the European Commission with a Decision, after negotiation with the member state, within three months after submission. Programs can be multi-fund (ERDF, ESF+ and JTF)

I contenuti dell'AP in sintesi

- a) A summary of the main "challenges"
- b) The justification of the selected strategic goals, priorities, specific objectives
- c) Specific objectives for each priority
- d) Actions, indicators and other information for each specific objective
- e) The intended use of technical assistance
- f) The financing plan
- g) The actions taken to engage relevant partners
- h) The status of the enabling conditions
- i) Reporting aspects.
- j) Managing authority, audit authority, and body receiving payments from the Commission



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Policy Objectives

OP1: A smarter Europe (innovative & smart economic transformation)

OP2: A greener, low-carbon Europe (including energy transition, the circular economy, climate adaptation and risk management)

OP3: A more connected Europe (mobility and ICT connectivity)

OP4: A more social Europe (the European Pillar of Social Rights)

OP5: A Europe closer to citizens (sustainable development of urban, rural and coastal areas and local initiatives)

In the Partnership Agreement, which represents the Single Document of strategic choices on the 5 Policy Objectives, the following are specified:

The **STRATEGY** for each Policy Objective

The **COMPLEMENTARITY BETWEEN** cohesion funds and other instruments

The **EU AMOUNT** for the different Funds per Policy Objective and category of Region

The **RESOURCES** of the different programmes in EU resources and co-financing

Allocation of resources by **TECHNICAL ASSISTANCE**



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WHAT'S NEW FOR 2021-2027 ?

- **Support to EU priorities:** [5 policy objectives](#) focused on key objectives and thematic concentration on those most relevant for a competitive and future-proof Europe
- **Climate targets:** weighted climate and environmental contribution of investments, minimum targets for funds, climate adjustment mechanism
- **Greater empowerment of local, urban & territorial authorities in the management of the funds:** dedicated policy objective implemented only through territorial and local development strategies
- **Simplification:** The new cohesion policy introduces [one set single of rules for the eight Funds](#) and a significant reduction in the amount of secondary legislation.



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WHAT'S NEW FOR 2021-2027 ?

This entails notably:

- **Lighter and more frequent reporting**
 - **Lighter controls for programmes:** sharp reduction of management verifications, “single audit principle”, proportionate arrangements for audits
 - **Faster delivery:** extended possibility to use [simplified cost options \(SCOs\)](#) and financing not linked to costs schemes
 - End of Commission approval for major projects
 - No more designation of management and control bodies
- **Creating conditions for success:** streamlined and clear enabling conditions to be respected throughout the whole programming period for reimbursement from the Union budget.
- **Flexible programming adjusted to new challenges and emerging needs:** allocation of flexibility amount only after mid term review of socio-economic situation and possible new challenges
- **Reinforced visibility and communication provisions:** requirements for [beneficiaries](#) and operations of strategic importance



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COMPARISON 2014-2020 vs 2021-2027

Priorities

2014 - 2020	2021 - 2027
11 thematic objectives, many investment priorities	5 policy objectives breaking sectoral silos, fewer and shorter specific objectives
TO 11: enhancing institutional capacity of public authorities and stakeholders and efficient public administration	Capacity building and cooperation with partners within and outside MS as horizontal actions

OP1: A smarter Europe (innovative & smart economic transformation)

OP2: A greener, low-carbon Europe (including energy transition, the circular economy, climate adaptation and risk management)

OP3: A more connected Europe (mobility and ICT connectivity)

OP4: A more social Europe (the European Pillar of Social Rights)

OP5: A Europe closer to citizens (sustainable development of urban, rural and coastal areas and local initiatives)



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COMPARISON 2014-2020 vs 2021-2027

Conditions for success

2014 - 2020	2021 - 2027
<p>Ex-ante conditionalities: mandatory summary of fulfilment also in the partnership agreement, action plans, deadline for fulfilment 31/12/2016, suspension of interim payments by the Commission to the priorities of the programme concerned that are affected</p>	<p>Enabling conditions: limited list, concise and exhaustive set of objective criteria for their assessment, each enabling condition linked to a specific objective and automatically applicable, application throughout the whole period, in case of non-fulfilment concerned expenditure may be included in payment applications but is not reimbursed by the Commission</p>



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COMPARISON 2014-2020 vs 2021-2027

Environment and climate

2014 - 2020	2021 - 2027
Relevant ex-ante conditionalities	Enabling conditions
List of specific actions to take into account environmental protection requirements, resource efficiency, climate change mitigation and adaptation, disaster resilience and risk prevention and management, in the selection of operations	Climate proofing of investments in infrastructure with an expected lifespan of at least 5 years
Minimum contribution at Fund level to climate targets	If 3% climate bonus applied to Recovery and resilience plan, then also to Cohesion Policy funds
Total indicative amount of support envisaged for climate change objectives to be indicated in the Partnership Agreement and in the programmes	National climate contributions, for ERDF and Cohesion Fund, to be established in the Partnership Agreement
	Climate adjustment mechanism: in case monitoring indicates insufficient progress, remediation measures agreed in annual review meeting
Managing authorities to undertake actions to avoid or reduce environmentally harmful effects of interventions and ensure results in net social, environmental and climate benefit	“Do no significant harm” principle

COMPARISON 2014-2020 vs 2021-2027

Mid Term Review

2014 - 2020	2021 - 2027
6% performance reserve allocated upon performance review in year 2019 and allocation of reserve only to performing investment priorities	Flexibility amount of 50% of 2026 and 2027 allocation, upon assessment by March 2025 of challenges identified in CSRs, progress in implementing National Energy and Climate Plans (NECPs) and European Pillar of Social Rights, socio-economic situation of Member State and regions, result of evaluations and implementation progress



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COMPARISON 2014-2020 vs 2021-2027

Performance framework

2014 - 2020	2021 - 2027
Selected indicators for allocation of performance reserve purposes	For monitoring, reporting on and evaluating programme performance
	All indicators in relation to each specific objective part of it and relevant for performance review
	Common result indicators introduced



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COMPARISON 2014-2020 vs 2021-2027

Partnership Agreement

2014 - 2020	2021 - 2027
Detailed and modified every year for alignment with OP amendments	Short and concise, indicative amounts, may be included in a programme, only one amendment possible (mid-term review)



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COMPARISON 2014-2020 vs 2021-2027

Transfers

2014 - 2020	2021 - 2027
<p>Not permitted between Funds. Non-transferability of resources between categories of regions</p>	<p>At approval of partnership agreement or with programme amendment:</p> <ul style="list-style-type: none">• Up to 5% of each Fund initial national allocation to other instrument under direct or indirect management (transfer back possible)• Up to 5% of each Fund initial national allocation to another CPR Fund• Up to 20% each Fund initial national allocation between the ERDF, ESF+ or Cohesion Fund (up to 25% for CZ)• Optional transfers from ERDF and ESF+ to Just Transition Fund (JTF) (max 300% of JTF and max 15% of giving Fund), irreversible• Up to 5% of initial allocations from Less developed regions (LDR) to Transition regions (TRR), from LDR to More developed regions (MDR) and from TRR to MDR, up to 10% for Member States with GNI < 90% EU. No limit for other way round.



COMPARISON 2014-2020 vs 2021-2027

Monitoring

2014 - 2020	2021 - 2027
Annual implementation report (AIR), transmission of financial data 3 times per year, annual review meeting, final implementation report	No more AIR Transmission of financial data 5 times per year, annual review meeting, final implementation report Obligatory publication of all information and data
Each member of the monitoring committee may have a voting right & advisory role of the European Commission	All members of monitoring committee have voting rights, non-members allowed to participate in its work, & advisory role of the European Commission



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COMPARISON 2014-2020 vs 2021-2027

Communication and Visibility

2014 - 2020	2021 - 2027
	Programmes include communication approach with objectives, target audiences, channels, budget and indicators
	Single branding
List of beneficiaries to be updated every 6 months	Mandatory and frequent publication of list of operations and of information of upcoming calls for proposals
	Operations of strategic importance
	Explicit provision on corrections in case beneficiaries do not comply with obligation



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COMPARISON 2014-2020 vs 2021-2027

Financial Support from the funds

2014 - 2020	2021 - 2027
	Clear distinction between Member States' support to beneficiaries and Union contribution to a programme
Reimbursement based on real costs only for Union contribution Use of simplified cost options only at MS to beneficiaries level	Union contribution reimbursement also through financing not linked to costs & based on Simplified Cost Options (SCO) (clear conditions covered by programme decision) and reduced scope of controls and audits Empowerment for Commission to set up off-the-shelf methods for Union contribution through SCOs and Financing not linked to costs (FNLTC)
Obligatory use of the simplified cost options for smaller operations not exceeding EUR 100 000	Obligatory use of the simplified cost options as form of grants for smaller operations not exceeding EUR 200 000



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COMPARISON 2014-2020 vs 2021-2027

Management and control

2014 - 2020	2021 - 2027
Designation of authorities	Designation of authorities discontinued and roll-over of existing authorities and systems promoted
Certifying authority	Accounting function can be performed by MA
Yearly submission of accounts mandatory, even if "zero"	Accounts submitted for each accounting year for which payment applications have been submitted
	Risk-based sample management verifications
	Enhanced proportionate arrangements: reliance on national management systems and rules (good track record and Management and Control System (MCS) functioning, participation in European Public Prosecutor Office (EPPO) framework), reduced statistical sample for audits of operations, application of national rules only, Commission only reviews work of audit authority. Reversible during the programming period!
Same beneficiary can be audited by different audits (unless below total eligible expenditure of operation as per regulation)	Overall single audit principle to avoid duplication of audits and management verifications of the same expenditure - increased cross-reliance on audits.



COMPARISON 2014-2020 vs 2021-2027

Evaluation

2014 - 2020	2021 - 2027
	Clear division of tasks between the Member States and the Commission
Obligation to conduct ex ante evaluation for each programme	No obligation to conduct an ex ante evaluation by MS
Ex-ante, interim and ex-post evaluation	MS obliged to finalise by end-June 2029 an evaluation for each programme to assess its impact COM to conduct mid-term evaluation and by end-2024 and a retrospective evaluation by end-2031



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COMPARISON 2014-2020 vs 2021-2027

Synergies

2014 - 2020	2021 - 2027
Within Common strategic framework MS to have due regard to strengthening coordination, synergies and complementarities between the ESI Funds and Horizon 2020 or COSME	Provisions on simplified selection for Seal of Excellence and Horizon Europe co-funded partnerships as well as Institutionalised Partnerships



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Focus on Health and Social Opportunities



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OP4: A more social Europe

In the 2021-2027 period, inclusive growth remains a priority for EU cohesion policy, with a dedicated policy objective: ***A more social and inclusive Europe implementing the European Pillar of Social Rights***. In synergy with ESF+ soft measures, ERDF support is organised into six specific objectives focused on:

- employment
- education, training and lifelong learning
- socioeconomic inclusion of marginalised groups and of third-country nationals
- healthcare and long-term care
- culture and sustainable tourism contributing to economic and social development.

This scope of support will enable Member States and regions to provide high-quality social services for all citizens, ranging from modernised public employment services to inclusive education and training infrastructure, affordable decent housing and healthcare. Member States and regions will be able to use these resources to carry out **reforms towards innovative social protection systems** that are more resilient and inclusive. As a novelty, the ERDF under this policy objective can directly support the culture and tourism sectors to foster socioeconomic development, social inclusion and social innovation in regions.



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Specific objectives of the ESF+

1. The ESF+ shall support the following specific objectives in the policy areas of employment and labour mobility, education, social inclusion, including contributing to poverty eradication, and thereby also contributing to the policy objective 'a more social and inclusive Europe implementing the European Pillar of Social Rights' referred to in Article 5, point (d), of Regulation (EU) 2021/1060:
 - (a) 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;
 - (b) modernising labour market institutions and services to assess and anticipate skills needs and ensure timely and tailor-made assistance and support for labour market matching, transitions and mobility;
 - (c) promoting a gender-balanced labour market participation, equal working conditions, and a better work-life balance including through access to affordable childcare, and care for dependent persons;
 - (d) promoting the adaptation of workers, enterprises and entrepreneurs to change, active and healthy ageing and a healthy and well-adapted working environment that addresses health risks;
 - (e) improving the quality, inclusiveness, effectiveness and labour market relevance of education and training systems including through validation of non-formal and informal learning, to support acquisition of key competences including entrepreneurial and digital skills, and by promoting the introduction of dual-training systems and apprenticeships;
 - (f) promoting equal access to and completion of quality and inclusive education and training, in particular for disadvantaged groups, from early childhood education and care through general and vocational education and training, to tertiary level, as well as adult education and learning, including facilitating learning mobility for all and accessibility for persons with disabilities;
 - (g) promoting lifelong learning, in particular flexible upskilling and reskilling opportunities for all taking into account entrepreneurial and digital skills, better anticipating change and new skills requirements based on labour market needs, facilitating career transitions and promoting professional mobility;
 - (h) fostering active inclusion with a view to promoting equal opportunities, non-discrimination and active participation, and improving employability, in particular for disadvantaged groups;



ESF+ Specific Objectives

- (i) promoting socio-economic integration of third-country nationals, including migrants;
- (j) promoting the socio-economic integration of marginalised communities, such as Roma people;
- (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;
- (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.



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ESF+ contribution to other Policy Objectives

2. Through the actions implemented under the ESF+ strand under shared management to achieve the specific objectives referred to in paragraph 1 of this Article, the ESF+ shall aim to contribute to the other policy objectives listed in Article 5 of Regulation (EU) 2021/1060, in particular the objectives related to:
- (a) a smarter Europe through the development of skills for smart specialisation, skills for key enabling technologies, industrial transition, sectorial cooperation on skills and entrepreneurship, the training of researchers, networking activities and partnerships between higher education institutions, vocational and educational training institutions, research and technological centres and enterprises and clusters, and support for micro, small and medium-sized enterprises and the social economy;
 - (b) a greener, low carbon Europe through the improvement of education and training systems necessary for the adaptation of skills and qualifications, the upskilling of all, including the labour force, the creation of new jobs in sectors related to the environment, climate, energy, the circular economy and the bioeconomy.



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ERDF – Policy/Specific Objectives

Article 3

Specific objectives for the ERDF and the Cohesion Fund

1. In accordance with the policy objectives set out in Article 5(1) of Regulation (EU) 2021/1060, the ERDF shall support the following specific objectives:

- (a) a more competitive and smarter Europe by promoting innovative and smart economic transformation and regional ICT connectivity (PO 1) by:
 - (i) developing and enhancing research and innovation capacities and the uptake of advanced technologies;
 - (ii) reaping the benefits of digitisation for citizens, companies, research organisations and public authorities;
 - (iii) enhancing sustainable growth and competitiveness of SMEs and job creation in SMEs, including by productive investments;

(iv) developing skills for smart specialisation, industrial transition and entrepreneurship;

(v) enhancing digital connectivity;



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ERDF – Policy/Specific Objectives

- (b) a greener, low-carbon transitioning towards a net zero carbon economy and resilient Europe by promoting clean and fair energy transition, green and blue investment, the circular economy, climate change mitigation and adaptation, risk prevention and management, and sustainable urban mobility (PO 2) by:
 - (i) promoting energy efficiency and reducing greenhouse gas emissions;
 - (ii) promoting renewable energy in accordance with Directive (EU) 2018/2001, including the sustainability criteria set out therein;
 - (iii) developing smart energy systems, grids and storage outside the Trans-European Energy Network (TEN-E);
 - (iv) promoting climate change adaptation and disaster risk prevention and resilience, taking into account eco-system based approaches;
 - (v) promoting access to water and sustainable water management;
 - (vi) promoting the transition to a circular and resource efficient economy;
 - (vii) enhancing protection and preservation of nature, biodiversity and green infrastructure, including in urban areas, and reducing all forms of pollution;
 - (viii) promoting sustainable multimodal urban mobility, as part of transition to a net zero carbon economy;



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ERDF – Policy/Specific Objectives

- (c) a more connected Europe by enhancing mobility (PO 3) by:
 - (i) developing a climate resilient, intelligent, secure, sustainable and intermodal TEN-T;
 - (ii) developing and enhancing sustainable, climate resilient, intelligent and intermodal national, regional and local mobility, including improved access to TEN-T and cross-border mobility;



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ERDF – Policy/Specific Objectives

- (d) a more social and inclusive Europe implementing the European Pillar of Social Rights (PO 4) by:
 - (i) enhancing the effectiveness and inclusiveness of labour markets and access to quality employment through developing social infrastructure and promoting social economy;
 - (ii) improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including by fostering resilience for distance and on-line education and training;
 - (iii) promoting the socioeconomic inclusion of marginalised communities, low income households and disadvantaged groups, including people with special needs, through integrated actions, including housing and social services;
 - (iv) promoting the socio-economic integration of third country nationals, including migrants through integrated actions, including housing and social services;
 - (v) ensuring equal access to health care and fostering resilience of health systems, including primary care, and promoting the transition from institutional to family-based and community-based care;
 - (vi) enhancing the role of culture and sustainable tourism in economic development, social inclusion and social innovation;



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ERDF – Policy/Specific Objectives

- (e) a Europe closer to citizens by fostering the sustainable and integrated development of all types of territories and local initiatives (PO 5) by:
 - (i) fostering the integrated and inclusive social, economic and environmental development, culture, natural heritage, sustainable tourism and security in urban areas;
 - (ii) fostering the integrated and inclusive social, economic and environmental local development, culture, natural heritage, sustainable tourism and security in areas other than urban areas.



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Some Examples

[Dev'Up Team-FEBRAP](#) helped 11 adapted work companies (a type of social economy enterprise in Brussels, Belgium) facing challenges and competition in their respective sectors **to explore new economic opportunities**. With this support, the enterprises **identified and developed new activities to employ people with disabilities**. A budget of up to EUR 300 000 in EU contributions and a dedicated project development and coaching team provided tailored support and entrepreneurial and innovation training based on recent research. As a result, 1 390 workers with disabilities found employment through 38 established projects in the selected adapted work companies.



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Some Examples

In Croatia, the [e-Schools](#) project, aimed at strengthening the digital capacity of the education system, received around EUR 34 million from ERDF and ESF resources between 2015 and 2018. The goal was to test a pilot introduction of ICT equipment and digital education tools in Croatia. The 151 selected primary and secondary schools received digital connectivity infrastructure and equipment, including laptops and tablets. In addition, up to 1 900 workshops, e-courses and webinars helped to improve the digital competences of teachers in the selected schools. Upon completion of the pilot project, 10 % of Croatian schools had increased their digital learning and teaching capacity. Thanks to the lessons learned in the pilot, a new framework is being developed that will extend the model to around 700 primary and secondary schools in the near future.



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Some Examples

The ERDF assisted the [Social Housing Agency](#) in Madrid, Spain, with resettlement and support programmes for families living in two segregated settlements of the region. EU support, which amounted to around EUR 31 million, enabled the purchase more than 600 social housing units on the second-hand property market. The agency made these houses available for rent, to integrate into the community socially excluded families residing in shanty towns. Parallel to the process of relocating families into the new homes, social workers and educators from the Social Housing Agency helped the families before, during and after their move. The programme has helped numerous disadvantaged families improve their housing situation and facilitated their integration into the community.



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Some Examples

In healthcare, [a new integrated health centre](#) in Kadrina, Estonia was set up with the support of the ERDF. Previously, access to healthcare in the area was difficult due to scattered infrastructure. The centre provides high-quality primary healthcare services, physiotherapy, home nursing and midwives' reception under one roof, along with a pharmacy, dental services and social counselling. The project has reduced the time patients spend reaching different services and has facilitated consultation between specialists.



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Kohesio



EN English

Search

Kohesio: discover EU projects in your region

Home Projects Beneficiaries Services



Kohesio is a comprehensive knowledge database that offers easy and transparent access to up-to-date information on projects and beneficiaries co-funded by EU Cohesion policy, during the 2014-2020 programming period.

[EU Cohesion Policy](#) supports hundreds of thousands of projects across regions and cities in the European Union. It aims to strengthen economic, social and territorial cohesion, by correcting imbalances between countries and regions. It also delivers on the Union's political priorities, especially the green and digital transitions.

Here you can find information on the [European Regional Development Fund](#) (ERDF), the [Cohesion Fund](#) (CF), and the [European Social Fund](#) (ESF).

The database currently contains more than 1.5 million projects and approximately 500,000 beneficiaries.



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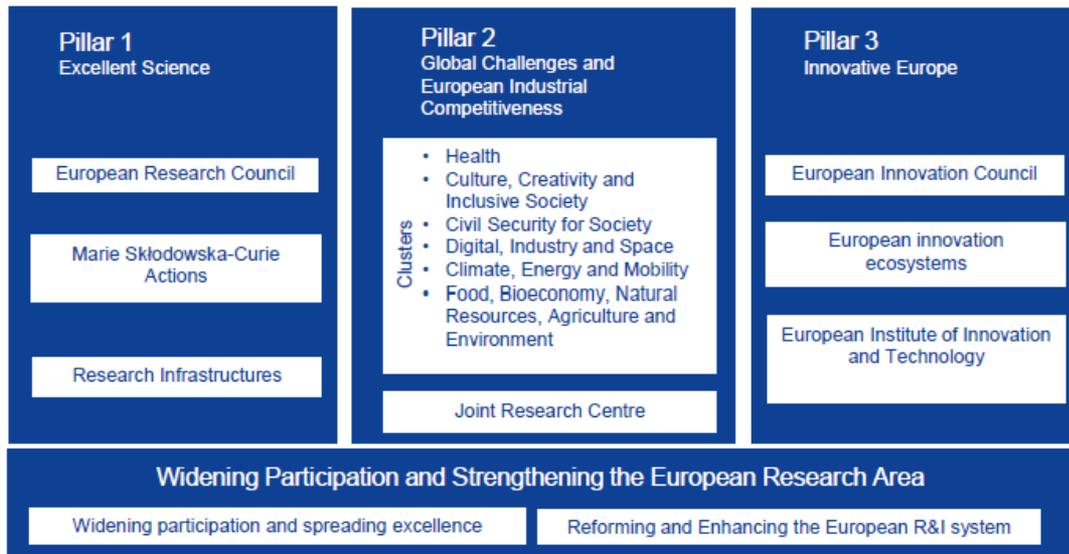
Synergies



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Horizon Europe and Cohesion Policy: Working for Innovation



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Synergies – what and why?

Synergies involve two or more programmes interacting to produce a greater effect than individual interventions.

For the first time, the 2014-2020 legal frameworks of Horizon2020 and the European Structural and Investment Funds included a specific request to establish synergies between the two programmes.

In 2014-2022 implementation limited to Seal of Excellence and Teaming

Difficulties in implementation (ex.stateaid) and lessons learnt

Reflected in the recitals in the Regulations

CPR: The synergies between the Funds and directly managed instruments should be optimised. The provision of support for operations that have already received a Seal of Excellence or were co-funded by Horizon Europe with a contribution from the Funds should be facilitated. Conditions already assessed at Union level, prior to the attributing of the Seal of Excellence quality label or the co-funding by Horizon Europe, should not be assessed again, as long as the operations comply with a limited set of requirements established in this Regulation. This should also facilitate following the appropriate rules set out in Commission Regulation (EU) No 651/2014 (20).

Horizon: Annex IV of Horizon Europe Regulation



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Preconditions

Alignment of strategies

- Horizon Europe strategic planning and Work Programmes
- ERDF/ESF+ programmes

Alignment of legal provisions

- Horizon Europe/Annex IV
- Common Provision Regulation ('CPR')
- EU State aid rules –the General Block Exemption Regulation ('GBER')

Joint support initiatives

- Seal of Excellence Community of Practice (regular meetings & IT platform)
- COMMISSION NOTICE -GUIDANCE ON SYNERGIES (C(2022) 4747 final of 5/7/22)
- Upcoming joint network research & cohesion community



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Seal of Excellence



Seal of Excellence

Pipeline of excellent R&I projects identified for funding

Leverage of Horizon Europe mechanisms and visibility + economic impact at regional level

- 'Seal of Excellence' for 'excellent' Horizon Europe proposals – not funded due to insufficient budget. Possible alternative funding, e.g. from ERDF, ESF+ or EAFRD – up to the national/regional managing authority's choice
- Projects may receive directly - **without a new qualitative evaluation** – ERDF/ESF+ funding under CPR rules (only check of specific eligibility criteria, contribution to programme objectives, smart specialisation priorities, scope of the fund – i.e. issues not guaranteed by the Seal)
- Managing Authorities may apply to these operations the **Horizon Europe categories, maximum amounts and methods of calculation of eligible costs**
- **'Synergies-friendly' State aid rules:** specific conditions facilitate the granting of aid for 'Seal-of-Excellence' projects of SMEs (→ Art. 25a and 25b amended General Block Exemption Regulation)



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Cumulative Funding



Cumulative funding

Allows pooling funding from two different instruments in one project

- An action that has received a contribution from another Union programme may also receive a contribution under the Programme, provided that the contributions do not cover the same costs. The rules of the relevant Union programme shall apply to the corresponding contribution to the action.
- Cumulative funding makes it possible to spread the financial burden of an operation and to address possible budgetary constraints (e.g. those stemming from an instrument's lower funding rates) because it can allow up to 100% of a synergy project to be funded from the EU's budget, provided relevant State aid rules are complied with.
- It also makes it possible to support national contributions, particularly in less developed Member States and regions.



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European Partnership



Support to Partnerships

ERDF as MS contribution in Horizon Europe partnerships

major incentive for participation of regional actors + alignment towards common EU priorities

- ✓ 'European Partnership' – Union with private and/or public partners jointly support the development and implementation of an R&I-programme:
 - ✓ 'Co-funded European Partnership': Union provides co-funding to an R&I-programme implemented by national entities
 - ✓ 'Institutionalised European Partnership' (Art. 185/187 TFEU): Union provides co-funding to a joint programme implemented by structures created for that purpose
- ✓ ERDF may be considered as Member State contribution to European Partnerships, provided that the relevant CPR-provisions and fund-specific regulations are complied with.
- ✓ Bodies implementing the partnership must be designated as ERDF intermediate bodies (CPR)
- ✓ MAs may decide to provide support directly to operations selected under the partnership (CPR)
- ✓ **NB: !! specific administrative steps allow to comply with the requirement of avoiding DOUBLE declaration of costs - Check the 'synergy guidance' (cumulative funding)!**



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Transfer to Horizon Europe



Transfer possibility

Strengthen participation in HE for low success rate MS

Preserves administrative capacity at national/regional level

- Member State may request a **voluntary** transfer of up to 5 % of their national allocation (e.g. ERDF) to Horizon Europe
- Transfer may only concern **future budgetary commitments**. ERDF programme has to be amended, incl. its financing plan
- Investments for the benefit of the transferring Member State/region.
- Commission may object to a transfer request if achievement of ERDF programme's objectives would be undermined
- **Rules of the receiving EU Fund/instrument apply** to the transferred amounts
- **Transfer-back:** Where the Commission has not entered into a legal commitment under Horizon Europe by 31 August of n+1, the corresponding uncommitted resources may be transferred back to the respective programmes covered by the CPR.



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THANK YOU FOR YOUR
ATTENTION



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