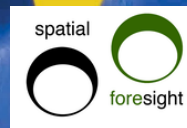




Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Final report

Prepared by t33, Spatial Foresight,
ÖIR and Oxford Research
February – 2025



OXFORD
RESEARCH

EUROPEAN COMMISSION

Directorate-General for Regional and Urban Policy
Directorate B — Policy
Unit B.1 — Policy development and Evaluation

Contact: Anne Wagner
E-mail: REGIO-B1-HEAD-OF-UNIT@ec.europa.eu

European Commission
B-1049 Brussels

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Final report

AUTHORS OF THE REPORT:

Alessandro Valenza (t33), Clarissa Amichetti (t33), Agnese Berton (t33), Elena Iacobucci (t33), Michele Alessandrini (t33), Sabine Zillmer (Spatial Foresight), and Helene Gorny (OïR)

Dea Hrelja (t33), Sandra Spule (Spatial Foresight), Maria Toptsidou (Spatial Foresight), Arndt Münch (OïR), Cristian Andronic (OïR), Line Schmidt (Oxford Rsearch), Louise Fabricius (Oxford Rsearch), Vera Lindström (Oxford Rsearch), Frank Holstein, Isabella Messinger, Bozhidar Ivanov, Katri Targama, Bence Kovats, Jacek Kotrasinski, and Petra Očkerl.

Manuscript completed in February 2025

1st edition

The European Commission is not liable for any consequence stemming from the reuse of this publication.

Luxembourg: Publications Office of the European Union, 2025

© European Union, 2025



The reuse policy of European Commission documents is implemented based on Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39). Except otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC-BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of elements that are not owned by the European Union, permission may need to be sought directly from the respective right holders.

PDF ISBN 978-92-68-27430-9

doi:10.2776/3577298

KN-01-25-043-EN-N

Table of Contents

Abstract	6
Résumé	7
Executive summary	8
Background.....	8
Methodological approach	8
Key findings	9
Conclusions and recommendations	13
Résumé exécutif	17
Contexte	17
Approche méthodologique	17
Principales conclusions.....	18
Conclusions et recommandations	23
Introduction	26
Background and objectives of the study.....	26
Establishing definitions.....	28
Overall methodological approach.....	32
Study structure.....	35
1. Policy overlap	36
1.1. Partnership Agreements and CPR programmes.....	36
1.2. Work programmes and strategic documents	42
1.3. National Resilience and Recovery Plans	44
2. Coordination mechanisms	47
2.1. Coordination among CPR Funds.....	47
2.1.1. The intensity of coordination among CPR funds	47
2.1.2. The mechanisms of coordination	50
2.2. Coordination between CPR funds and EU funds and instruments.....	53
2.2.1. Modalities of coordination of EU funds and instruments with CPR Funds.....	53
2.2.2. Intensity and modalities of coordination between CPR funds and EU funds and instruments	58
2.3. Coordination between Cohesion policy funds and RRF	61
2.3.1. NRRP coordination mechanisms with Cohesion Policy programmes	61
2.3.2. Cohesion Policy programme coordination with NRRPs	63
2.4. Focus: Role of Monitoring Committees.....	65
2.4.1. Composition of the Monitoring Committee	65
2.4.2. The role of the Monitoring Committee in coordination: the perspective of programme authorities	66

2.5. Overall coordination assessment.....	68
2.5.1. Rationale for coordination	68
2.5.2. Challenges and facilitating factors in coordination.....	69
3. Synergies and demarcation	72
3.1. Synergies and demarcation among CPR funds	72
3.1.1. Intensity of synergies and demarcation among CPR funds	73
3.1.2. Synergies and demarcation mechanisms envisaged in the CPR programmes.....	79
3.2. Synergies and demarcation between CPR funds and EU funds and instruments	82
3.2.1. Intensity of synergies and demarcation between CPR funds and EU funds and instruments	82
3.2.2. Synergies and demarcation mechanisms envisaged in the EU funds and instruments toward the CPR funds.....	85
3.2.3. Synergies and demarcation mechanisms envisaged in the CPR programmes with the EU funds and instruments.....	87
3.3. Synergies and demarcation between Cohesion Policy funds and the NRRPs.....	91
3.3.1. Synergies envisaged in the NRRPs with the Cohesion Policy funds	91
3.3.2. Synergies envisaged in the Cohesion Policy funds with the NRRPs	95
3.4. Transfers and contributions to the budgetary guarantee.....	97
3.4.1. Transfers among CPR funds.....	98
3.4.2. Transfers between CPR programmes and other EU funds and instruments	103
3.4.3. Contributions to the budgetary guarantee under InvestEU	106
3.4.4. Potential benefits and obstacles of transfers.....	108
3.5. Insights on synergies.....	108
3.5.1. Differences in synergy identification between the programming phase and implementation phase	109
3.5.2. Potential benefits perceived by the Programme Authorities	110
3.5.3. Costs and obstacles of synergy implementation	111
3.5.4. Facilitating factors in relation to synergy	113
4. Conclusions and recommendations	114
Annexes A – Methodological annexes	119
Annex A1- Cross-matching table of Policy areas, the CPR policy objectives and the RRF Pillars Regulation and synergy definition.....	119
Annex A2 – Methodological aspects for the analysis of EU funds and instruments	127
Annex B – Additional information on the analysis of the Partnership Agreements 	129
Annex C – Additional information on the analysis of the National Recovery and Resilience Plans	141

Annexes D – Description of the survey data and additional information on the analysis of the CPR funds.....	150
Annex D1 - Description of the survey data	150
Annex D2 - Additional information on the analysis of the CPR funds.....	153
Annex E - List of programmes identified as practices and good practices for analysis and interviews.....	158
Annex F - Template of semi-structured interviews.....	172
Annex G – Best practices.....	176
Annex G1 – Coordination mechanisms	176
Annex G2 - Synergies	203

Acronyms

AMIF	Asylum, Migration and Integration Fund
BMVI	Instrument for Financial Support for Border Management and Visa Policy
CAP	Common Agricultural Policy
CF	Cohesion Fund
CEF	Connecting Europe Facility
CLLD	Community-Led Local Development
CoR	European Committee of the Regions
CPR	Common Provisions Regulation
CSRs	EU country-specific recommendations
DEP	Digital Europe Programme
DG AGRI	Directorate-General for Agriculture and Rural Development
DG BUDG	Directorate-General for Budget
DG CONNECT	Directorate-General for Communications Networks, Content and Technology
DG EAC	Directorate-General for Education and Culture
DG ECFIN	Directorate-General for Economic and Financial Affairs
DG EMPL	Directorate-General for Employment, Social Affairs and Inclusion
DG GROW	Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs
DG MOVE	Directorate-General for Mobility and Transport
DG REGIO, REGIO	Directorate-General for Regional and Urban Policy
DG RTD	Directorate-General for Research and Innovation
DG SANTE	Directorate-General for Health and Food Safety
DG TAXUD	Directorate-General for Taxation and Customs Union
EAFRD	European Agricultural Fund for Rural Development
EC	European Commission
EGF	European Globalisation Adjustment Fund
EIB	European Investment Bank
EMFAF	European Maritime, Fisheries and Aquaculture Fund
EMFF	European Maritime and Fisheries Fund
ERDF	European Regional Development Fund
ESF+	European Social Fund+
ESIF, ESI Funds	European Structural and Investment Funds
ETC	European Territorial Cooperation
FG	Focus Group
HE	Horizon Europe
IB	Intermediate Body
ISF	Internal Security Fund
ITI	Integrated Territorial Investment(s)
LAG	Local Action Group
LRA(s)	Local and Regional Authority(ies)
MA	Managing Authority
MC	Monitoring Committee
MS(s)	Member State(s)
NRRP	National Recovery and Resilience Plan
PA	Partnership Agreement
PO(s)	Policy Objective(s)
PR	Programme(s)

RRF	Recovery and Resilience Facility
RIS3, S3	Research and Innovation Plans & Smart Specialisation Strategies
R&D&I	Research and Development and Innovation
SCO, SCOs	Simplified Cost Options
SDGs	Sustainable Development Goals
TA	Technical Assistance
TJTP	Territorial Just Transition Plan
TSI	Technical Support Instrument
WP	Work Programme

Abstract

This study evaluates how Managing Authorities are leveraging the policy and implementation options provided by the Common Provisions Regulation (CPR) 2021/1060 to enhance complementarity across various funds at both strategic and intervention levels. The analysis identifies significant policy overlaps among CPR funds and between these and other EU funds and instruments in several key areas such as innovation, green and digital transitions, and connectivity. Coordination mechanisms and synergies are commonly observed among the ERDF, the JTF, the ESF+, and the EMFAF while they are less evident between these and other EU funds and instruments. The CPR funds, particularly the ERDF and the ESF+, have well-structured strategic mechanisms (Partnership Agreements and through monitoring committees) as well as operational tools (e.g., integrated territorial instruments and smart specialisation strategies) to potentially bridge with other EU funds and instruments.

Despite these mechanisms and tools, the opportunities for synergies at the operational level are often underutilized by Managing Authorities, as in the case, for instance, of financial transfers. Further on, other funds partially overlook Cohesion Policy goals, limiting the potential for integrated and comprehensive policy implementation. The study identifies general coordination challenges, administrative complexities, and resource-related constraints as primary barriers to effectively ensure coordination and synergies, and achieve broader EU policy objectives. It suggests that complementarity is best achieved through meticulous programme design that includes comprehensive needs analysis and active stakeholder involvement, to avoid sporadic and burdensome efforts to adjust programming during the implementation phase. It recommends a simplified regulatory framework, restoration of ex-ante evaluations, and empowerment of programme authorities with necessary resources and capacity-building measures. These efforts should focus on optimizing resource use through established coordination mechanisms (like monitoring committees) and integrating strategies (like CLLD and ITI) to foster bottom-up complementarity.

Résumé

Cette étude évalue la manière dont les Autorités de Gestion tirent parti des options politiques et de mise en œuvre offertes par le Règlement portant Dispositions Communes (RPDC) 2021/1060 pour renforcer la complémentarité entre les différents fonds, tant au niveau stratégique qu'opérationnel. L'analyse identifie des chevauchements politiques significatifs entre les fonds du RPDC et entre ceux-ci et d'autres fonds et instruments de l'UE dans plusieurs domaines clés tels que l'innovation, les transitions verte et numérique et la connectivité. On observe couramment des mécanismes de coordination et des synergies entre le FEDER, le FTJ, le FSE+, et le FEAMPA, alors qu'ils sont moins évidents entre ces fonds et d'autres fonds et instruments de l'UE. Les fonds du RPDC, en particulier le FEDER et le FSE+, disposent de mécanismes stratégiques bien structurés (accords de partenariat et comités de suivi) ainsi que d'outils opérationnels (par exemple, les instruments territoriaux intégrés et les stratégies de spécialisation intelligente) qui peuvent potentiellement servir de passerelles avec d'autres fonds et instruments de l'UE.

Malgré ces mécanismes et outils, les opportunités de synergies au niveau opérationnel sont souvent sous-utilisées par les Autorités de Gestion, comme en témoigne, par exemple, le cas des transferts financiers. En outre, d'autres fonds négligent partiellement les objectifs de la politique de cohésion, ce qui limite le potentiel de mise en œuvre d'une politique intégrée et globale. L'étude identifie la coordination générale, la complexité administrative et les contraintes liées aux ressources comme les principaux obstacles à une coordination et à des synergies efficaces, ainsi qu'à la réalisation d'objectifs politiques européens plus larges. Elle suggère que la complémentarité est mieux réalisée grâce à une conception minutieuse du programme incluant une analyse complète des besoins et une participation active des parties prenantes, afin d'éviter des efforts sporadiques et contraignants d'ajustement de la programmation pendant la phase de mise en œuvre. Elle recommande un cadre réglementaire simplifié, le rétablissement des évaluations ex ante, et un accroissement des capacités des autorités responsables des programmes en leur allouant les ressources nécessaires ainsi que des mesures de renforcement des capacités. Ces efforts devraient se concentrer sur l'optimisation de l'utilisation des ressources par le biais de mécanismes de coordination établis (comme les comités de suivi) et l'intégration de stratégies (comme les DLAL et les ITI) afin de favoriser une complémentarité ascendante.

Executive summary

Background

Common Provisions Regulation (CPR) (EU) 2021/1060 has grouped eight shared management funds ⁽¹⁾ under a single rulebook to strengthen and streamline the legislative framework and enhance synergies between cohesion policy, maritime affairs and HOME affairs funds. Furthermore, the CPR amplifies the policy and implementation options to coordinate these funds better and enhance synergies among them and with other EU funds and instruments, such as the Recovery and Resilience Facility (RRF), the Technical Support Instrument (TSI), the Common Agricultural Policy (CAP, European Agriculture Fund for Rural Development), Horizon Europe (HE), the Connecting Europe Facility (CEF), the Digital Europe Programme (DEP), the InvestEU Fund, LIFE, Erasmus+, the EU4Health Programme, and the European Globalisation Adjustment Fund (EGF).

The **purpose of this study** is to assess to what extent the Managing Authorities (MAs) use the 2021-2027 **policy and implementation options** created to favour **coordination and synergies** among CPR funds and between these and other EU funds and instruments, both at a strategic and intervention level.

Methodological approach

Complementarity, coordination, and synergy are widely used terms in EU jargon. However, there is no clear definition of these terms, which are used both synonymously and with different meanings. Therefore, the study has developed a **taxonomy** to detail and categorise the concept of **policy overlap, coordination, synergies** and **complementarity**, at the strategic and intervention levels.

- **Policy overlap** is used when two programmes/funds/instruments share the same policy areas and type of beneficiaries.
- **Coordination** is defined as the presence of institutional arrangements/administrative mechanisms or procedures in place to align the implementation of the programmes/funds/instruments. Policy overlap without coordination may lead to unclarity and risk of double funding.
- **Synergy** occurs when two or more funds/instruments interact at the intervention and financial levels. Synergies are classified as phased (alternative and sequential), concurrent (combined and cumulative), demarcation and transfer.
- **Complementarity** between two funds/instruments occurs when both coordination mechanisms and synergies are established. Complementarity, therefore, only exists

⁽¹⁾ The Common Provisions Funds or CPR funds are the European Regional Development Fund (ERDF), the European Social Fund Plus (ESF+), the Cohesion Fund (CF), the Just Transition Fund (JTF), the European Maritime, Fisheries and Aquaculture Fund (EMFAF), the Asylum, Migration and Integration Fund (AMIF), the Internal Security Fund (ISF) and the Instrument for Financial Support for Border Management and Visa Policy (BMVI).

when it is ensured at both the strategic level (coordination) and the intervention and financial level (synergy).

The **study coverage** encompasses 395 regional and national programmes supported by CPR funds ⁽²⁾, all 27 Partnership Agreements (PAs), all 27 National Recovery and Resilience Plans (NRRPs) supported by the RRF, and selected EU funds and instruments.

The methodological approach includes two phases:

- The **desk research** aims to identify policy overlap, detect coordination mechanisms, and determine the type of synergies among CPR programmes, EU funds and instruments and the RRF.
- **Interviews** with 71 programme authorities, mainly Managing Authorities (MAs), provided information that not only complemented the documental analysis but also provided valuable insight into the data collected to facilitate the interpretation. Moreover, it helped identify good practices for mechanisms to support coordination among funds and policy options to implement synergies.

Key findings

Based on this methodology, the study collected granular information on the policy overlap, coordination mechanisms and synergies that emerged from the documental analysis and interviews with the programme authorities.

Firstly, the **main elements** that emerged concerning **policy overlap** include:

- The **Partnership Agreements analysis revealed key elements of policy overlap across CPR funds with varying intensity across different policy areas**. Significant policy overlap is observed in Research and Development and Innovation (R&D&I), digital connectivity, green transition, and SME competitiveness. Furthermore, areas such as the integration of third-country nationals, access to social services, and healthcare systems demonstrate less intense policy overlap among multiple funds. Considering the EU funds and instruments, the analysis underscores a consistent policy overlap among Cohesion Policy funds across most policy areas, with recurring overlaps between CPR funds and the RRF, and other funds like EAFRD, HE, and LIFE.
- **The RRF stands out as a key instrument in synergy planning with CPR funds** due to its broad financing scope (both for reforms ⁽³⁾ and investments) and time constraints.
- **The programme-level analysis of 395 programmes** supported by one or several of the 8 CPR Funds revealed trends in the overlap of policy areas, coordination mechanisms, and identified synergies. The EAFRD and EMFAF are predominantly combined with the ERDF and ESF+, while sector-specific funds like HE, CEF, and DEP primarily align with the ERDF and CF. Coordination between the CPR programmes and other EU funds and instruments varies and is often influenced by the institutional framework of each Member State. The analysis synthesises synergies between

⁽²⁾ Three programmes were not included in the analysis because they were adopted or became available in the SFC database after the cut-off date of 28 February 2023 agreed for the documental analysis. Those programmes are: Brussels Capital Region, ERDF (Belgium), Saint Martin, ERDF (France), and Slovakia – EMFAF.

⁽³⁾ The analysis of the reforms was out of the scope of this study.

different **Policy Objectives (POs) and EU funds and instruments**, with notable overlaps in areas like R&D&I, green transition, and urban mobility.

The following **key insights** emerged from the desk research and the data collected through the interviews with programme authorities in relation to **coordination mechanisms** in place to foster complementarities among CPR programmes, other EU funds and instruments and the RRF.

- **Partnership Agreements serve as strategic documents** outlining mechanisms for collaboration among various funds and programmes, with inter-institutional committees often being part of this strategic framework. The design of PAs is pivotal in setting up coordination mechanisms to ensure synergies, especially during early programming stages. The PAs facilitate both top-down national coordination and bottom-up consultation processes. They lay the groundwork for working groups and steering committees, which are crucial for delineating demarcation lines and preventing the duplication of efforts. The PAs also facilitate coordination in both the programming and implementation phases.
- **Concerning coordination among CPR funds**, the ESF+ and ERDF demonstrate the highest degree of coordination. They also represent the funds that coordinate the most with others, often co-implementing within multi-fund programmes, thereby fostering inherent coordination. The ERDF connects with the CF and JTF, while the ESF+ coordinates with the HOME funds to address social and labour market integration of third-country nationals and the most disadvantaged people. The JTF, in coordination with the ERDF and the ESF+, addresses decarbonisation and local human resources development to mitigate the impacts of the green transition. In most cases, the Monitoring Committee (MC) plays a vital role in coordinating CPR funds, ensuring strategic alignment across EU programmes. Comprising representatives from various stakeholders, the diverse composition of MCs facilitates robust collaboration and information exchange. This enhances synergy and prevents overlap, significantly influencing the effective implementation and integration of multiple funding streams.
- **Concerning the coordination with other EU funds and instruments**, the majority of respondents managing CPR programmes indicate some level of coordination with other EU funds and instruments, yet nearly one-third report a lack of effective coordination. The barriers include administrative complexity, insufficient targeted efforts for coordination, limited institutional communication, and the pursuit of distinct programme goals, hindering potential synergistic actions. Overall, the analysis reveals a multifaceted interaction landscape. HE stands out for its extensive coordination with the ERDF in the research and innovation sectors. The DEP actively coordinates with the ERDF, particularly in digital transformation projects, while the LIFE programme coordinates with the ERDF and JTF. The ERDF and ESF+ emerge as central to the coordination among various funds. The HOME funds are not frequently mentioned in specific interactions with other EU funds and instruments. The EAFRD is mentioned less often than expected, partly due to the distinct and different legal and policy framework (not covered by the CPR in 2021-2027) and its integration with the EAGF in CAP Strategic Plans in this programming period. MC effectiveness in coordinating CPR Funds with other EU funds varies by instrument. In some cases, the MC successfully integrates diverse programmes like ERDF and ESF+ with support from HE or LIFE national contact points. However, it often struggles to ensure coordination with other funds.
- **Concerning coordination with the RRF and Cohesion Policy funds**, only about half of the NRRPs provide a clear description of the planned mechanisms to ensure collaboration and communication with cohesion policy programmes. When they do, it

appears that the bodies responsible for managing the NRRPs are in many cases also entrusted with implementing cohesion policy programmes and have leveraged the lessons learnt from the experiences and implementation modalities gained from them. Looking at PAs, while the PA analysis indicated very limited and rather one-sided coordination of the NRRPs with Cohesion Policy funds (partly perhaps because the programming of PAs was largely done prior to the RRP programming), interviews of programme authorities suggest that there are ongoing coordination efforts for most Cohesion Policy programmes with the corresponding NRRP counterparts. This discrepancy between the results of the PA analysis and the interviews is mainly attributed to difficulties in inter-level governmental interaction, particularly between regional and national bodies. In some instances, coordination is confined to the programme design phase, focusing on defining roles and responsibilities to ensure clear demarcation and efficient collaboration between the various programmes. Regular high-level meetings aim to align objectives and strategies, emphasising the identification and utilisation of synergies. However, most programmes extend coordination efforts into the implementation phase, especially when the NRRPs and Cohesion Policy programmes are managed by the same authorities or under the same institutional framework. The MC facilitates coordination between CPR programmes and NRRPs with varying effectiveness. Its diverse composition supports information exchange and collaboration, though its impact on fund synergy and overlap prevention is perceived differently among programme authorities.

- **Challenges in achieving effective coordination** can be grouped into general coordination challenges, issues specific to the EU policy framework, and resource-related issues:
 - General challenges include varied stakeholder perspectives and interests, requiring consensus-building and sometimes compromise.
 - EU-specific issues include the increased complexity and the administrative burdens of coordinating multiple programmes and funds with varying objectives, target groups, and management styles. For some MAs, the primary difficulties in implementing synergies among funds stem from the diverse set of rules governing each fund, including the ensuing risk of double funding, and the lack of clear communication and information from the Commission on the possibilities and modalities of implementing synergies between the various funds and instruments.
 - Resource constraints, particularly in human resources, hinder effective planning and implementation, especially for smaller programmes or MSs with fewer resources. Understanding and aligning the different funding rules and coordinating the various stakeholders to ensure that the synergies are effective and yield the desired outcomes is time-consuming and requires sufficient resources. In this context, MC serves as a pivotal instrument to enhance coordination. The MC's composition, featuring a broad array of stakeholders from different funding streams and programme areas, facilitates an exchange of information and collaborative strategy development. However, the impact of the MC varies, with some programme authorities viewing its coordination role as limited or even non-existent. This variation often depends on the specific configuration of the MC and the intensity of integration between CPR funds and other EU instruments within the geographical scope of the programme.

Synergies were analysed at the intervention and financial level (i.e. transfers among CPR programmes and other EU funds and instruments). These are the **key findings** that emerged from the desk research and interviews in relation to **synergies at the project level**:

- **Concerning the CPR funds**, the predominant synergy identified is between ERDF and ESF+. This arises from the nature of these two funds, which cover a broad range of complementary interventions. The analysis also reveals that the synergy between these funds is primarily classified as combined, namely when two different interventions with the same goal and the same target group(s) are supported by two or more funds. Typically, the ERDF funds equipment procurement, facility renovation, or construction, while the ESF+ focuses on human capital investment. This highlights how synergistic interaction is more effectively created when two funds collaborate on different aspects of the same intervention. In the case of the HOME fund programmes, most synergies are observed between the HOME funds and ESF+. This is often due to the nature of the Funds, i.e. the nature of the policy attributed to each instrument and their design at the EU and national level.
- **Concerning synergies with other EU funds and instruments**, the most frequent synergies with CPR programmes are found with HE, particularly with EMFAF and ERDF. From the document analysis, 84% of EMFAF and 71% of ERDF programmes envisage some type of synergy. Interviews confirm this trend, with HE typically focusing on initial research stages and CPR programmes on market applications. Another example is the Seal of Excellence (SoE) framework, where project preparation occurs under HE, and project implementation financing is provided by the ERDF due to HE calls budgetary constraints. LIFE stands as the second most utilized for creating synergies, mainly with EMFAF (40% of programmes mentioning synergy) but also with ERDF (37%) and JTF (31%). The EAFRD also establishes multiple synergies, especially with EMFAF (40%) and ERDF (36%). However, due to its long-standing cooperation, higher synergy levels were expected. Interviews reveal that creating synergies with EAFRD has become more challenging since it is no longer included in the same CPR regulation. Erasmus+ is relevant in terms of synergies, especially with ESF+ (39%), while DEP frequently establishes synergies with ERDF (39%). One of the most common tools to ensure synergies with other EU funds and instruments are the selection criteria. For example, the DEP focuses on bridging the digital divide by targeting under-served areas, while InvestEU prioritizes high-risk projects that complement traditional funds like ERDF and CF. The EAFRD avoids intervening where Cohesion Policy programmes do, except in strategic areas like broadband, enhancing fund efficiency and targeted impact.
- **In relation to synergies with the NRRPs**, the situation is rather mixed. If the majority of the cohesion policy programmes indicate potential synergies with the NRRPs, some NRRPs and programmes provide only limited information on the planned synergies. When potential synergies are mentioned, they can be of different types. Concurrent synergies are evident where cohesion policy funds complement RRF-financed infrastructural networks and initiatives in policy fields like industrial policy, transport, environmental infrastructure, renewable energy communities, healthcare, and education. Phased synergies emerge due to the different implementation durations of the NRRPs and cohesion policy programmes ⁽⁴⁾. Projects initiated by NRRPs often anticipate completion under cohesion policy funds, facilitating a continuous resource flow and smooth project execution. Demarcation is the most common synergy type, seen in thematic, geographical, or timing criteria. For instance, while the NRRPs handle shorter-duration projects, cohesion policy funds take on more prolonged and

⁽⁴⁾ Another explanatory element is the combination of reforms under the NRRPs and investments under the cohesion policy programmes, but this was out of the scope of this study.

more extensive initiatives, ensuring project alignment with the respective timelines and capacities of each funding source, thereby enabling efficient resource allocation.

- The **programming phase** is crucial for laying the foundation for synergies among all funds and instruments. It involves stakeholder consultations, strategic discussions with various authorities, and clarification of the scope of project interlinkage. Insufficient identification of synergies during this phase could make it challenging to achieve them later.
- **As regards synergies at the financial level**, namely financial transfers among CPR programmes and between these and other EU funds and instruments as well as contributions to InvestEU, their use appears quite limited, especially from CPR programmes to EU funds and instruments.⁵ **Among CPR Funds**, the total of the transfers decided at the time of the analysis amounts to EUR 7,54 billion. Specifically, 11 MSs have approved a transfer between the ERDF and ESF+ (both ways, for a total amount of EUR 2,66 billion), seven MSs between the ERDF/ESF+ and CF (both ways, EUR 3,70 billion), one MS from the ERDF/ESF+ to the JTF (EUR 545 million), one MS from CF to EMFAF (EUR 14 million) and one MS from ERDF/ESF+/CF/EMFAF to the BMVI (EUR 621 million). As regards **transfers to other EU Funds and instruments and contributions to InvestEU**, the total of the transfers decided at the time of the analysis amounts to EUR 312,7 million –to compare with a maximum allowed by the regulations of around EUR 18 billion: two MSs approved a transfer from the ERDF to HE (EUR 23,5 million), one MS from the ESF+ to Erasmus+ (EUR 57 million), and four MSs made a contribution from CPR programmes to InvestEU (EUR 232,2 million). During interviews with programme authorities in spring-autumn 2023, most MAs were not considering additional financial transfers at that stage of programme implementation, nor were they certain about the possibility of utilizing this option in the future. Eventually, an analysis of work documents and strategic plans from other EU funds and instruments reveals a lack of specific guidance on how these resources would be utilized, with the exception of the Connecting Europe Facility (CEF). Therefore, the added value of transfers could not be demonstrated based on the research material of the present study.

Conclusions and recommendations

The study explores complementarity from two distinct perspectives: coordination (among funds and programmes) and synergy (among projects).

Coordination is crucial not only for amplifying the impact and results but also for boosting programme performance. However, the path to effective coordination is fraught with challenges. These range from reconciling diverse stakeholder interests to navigating the complex EU policy framework and addressing resource and capacity limitations. Particularly, the variance in administrative requirements and strategic objectives among different funds like ERDF, ESF+, and AMIF complicates coordination efforts. Moreover, aligning the (reform and) investment priorities and their implementation under the NRRPs with longstanding programmes requires meticulous planning to ensure synchronized efforts and prevent misalignments in objectives. Despite these hurdles, structured coordination remains a

⁵ it is important to note that the cut-off date for analyses and interviews was September 2023. Given this timing, it was too early to observe transfers back from other EU instruments under direct or indirect management, or from Invest EU.

prevalent practice, with MC playing an important role albeit with varying depth and consistency across different types of coordination.

Synergy in EU programmes, particularly between CPR and other EU funds, plays a pivotal role in enhancing the impact and efficiency of interventions. The analysis reveals that the foundational groundwork for effective synergy occurs during initial programming. Here, strategic consultations and detailed planning ensure that resources from various programmes are optimally aligned and utilized, preventing duplication and maximizing impact. However, achieving these synergies is not without challenges. The primary obstacles include significant administrative burdens and the complex nature of coordinating multiple funds with diverse regulations. These challenges underscore the necessity for more streamlined processes and supportive mechanisms such as databases to facilitate easier planning and implementation for enhanced synergies.

Overall, the new possibility to **transfer resource** between CPR funds and other EU funds has not significantly enhanced complementarity due to several factors, most importantly due to a lack of familiarity with transfer mechanisms and their complexity, which have deterred their use. Improved dissemination of information on the benefits and drawbacks of financial transfers, as learned from Horizon Europe, could encourage their somewhat broader adoption and enhance complementarity among EU funding streams. The modest budget allocations for Cohesion Policy programmes in certain Member States or regions limit the scope for financial transfers. Programme authorities often avoid transfers, fearing the financial needs will exceed available funds, especially when managing smaller funds.

Conclusions of the study on coordination and synergy converge indicating that complementarity is primarily achieved through careful programme design, which encompasses developing a vision for specific sectors and regions. This means that for effective complementarity, in addition to a stable and predictable policy and legal framework (which is supportive of corresponding measures), complementarity needs to be actively planned and built into the programmes and joint approaches need to be adopted from the outset. Effective programming also includes a thorough needs analysis and active involvement of stakeholders. This allows the programme authorities to set up coordination mechanisms across different funds and instruments at an early stage. Ultimately, good programming leads to complementarity, i.e., complementarity works when it aligns with the programme objectives. In this context, solid data systems should be further developed to help avoid overlapping use of support from various funds or instruments or optimise their joint use, where justified. It should also bring enhanced transparency helping managing authorities and other bodies as well as MCs in their work.

On the other hand, **complementarity**, both in terms of coordination and synergies, **is more challenging to achieve at the implementation level**, if it has not been strategically designed during the earlier programming phase. In such cases, the pursuit of complementarity becomes case-by-case driven, sporadic, and burdensome. Consequently, programme authorities are required to adjust their programming and establish new mechanisms in terms of coordination and synergies. In this context lessons could be learnt regarding cohesion policy programmes and the NRRPs where challenges to achieve complementarity largely originated from the preparation of the new cohesion policy programmes having been well advanced when the NRRPs were adopted.

The **Cohesion Policy programming framework already enables national and regional programme authorities to develop complementarity**. Indeed, the unique programming and delivery system is flexible enough to integrate resources at different levels. In this context, the programme authorities and Monitoring Committees have also proven to be effective drivers of coordination. Importantly, through territorial integrated strategies (i.e., Community-Led Local

Development (CLLD) and Integrated Territorial Investments (ITI)), Cohesion Policy programmes enable local actors to achieve complementarity from the bottom up.

However, there are **challenges that jeopardise the achievement of synergies**. Besides general issues (which are common in policy delivery whether at EU, national, regional, or local levels), there are issues specific to EU Cohesion Policy that are mainly connected with the existence of:

- **Several programmes in each region or sector** requiring efforts to coordinate different programmes.
- The **proliferation of instruments with their different regulatory frameworks** and the multiplication of the policy priorities, which increases complexity.
- A **lack of administrative capacity**, also due to reduced programming time.

All these factors divert the energy and attention of programme authorities from designing effective strategies, i.e., optimising the use of resources through complementarities. Therefore, to improve complementarity among funds, **it would be helpful to have a more straightforward overall regulatory framework** to allow MAs to concentrate on the quality of programming. This entails reducing the number of programmes for the same regions/territories for a better coordination, limiting the number of financing instruments or at least having genuinely unique programming and implementation rules, restoring ex-ante evaluation, and empowering programme authorities with capacity building. It also means maximising the use of already existing instruments and frameworks (PA, programmes, ITI, CLLD) through enhancing the strategic planning and policy coordination function they can fulfil - instead of introducing new mechanisms 'downstream' of the programming process. This risk ultimately becoming more burdensome to programme authorities rather than increasing complementarity.

The **recommendations** provided are designed to further enhance the overall CPR framework, which has proven capable of ensuring complementarity through the existing tools but there is still scope for improvements. Substantial changes will likely entail a new learning process for MAs and possibly involve additional workload and resources investment, whereas the MAs need to focus on the quality of the programming. Therefore the continuation with existing structures and frameworks would be preferred. However, specific recommendations are provided to enhance the existing framework continuously.

These recommendations target all levels of EU Cohesion Policy governance (EU, national, and programme-specific) and can be categorised into three types:

- **Regulatory**: ensuring a unified framework for all shared management funds, using a standardised terminology across different funds and instruments. Additionally, a single multi-fund programme document that covers one region or sector and includes all the funds should be required.
- **Upstream policy integration and governance**: Utilising existing tools to boost complementarity has proven effective in enhancing cross-programme coordination, with an integrated strategic framework, restoring the ex-ante evaluation, and the active involvement of stakeholders. Joint MCs are examples for this and reinforcing the coordination role of monitoring committees should be explored, notably for MCs linked to regional programmes. In terms of synergies, CLLD and ITI can act as catalysts for local actors to optimise the use of funds within territorial strategies for local development.

- **Specific capacity-building activities:** Exploiting existing EU schemes (e.g. REGIO Peer Learning schemes or INTERREG programmes) and organising support for beneficiaries through guidance, including a complementarity matrix.

The conclusion from the study is that Cohesion Policy, through its programming and governance framework, already offers a rather good framework to enhance complementarity not only at the programme authority level but also at the beneficiary level, provided that some conditions are met, in particular a careful encompassing strategy and programme design upstream. However, this potential for complementarity is subject to diverse challenges, such as the use of multiple Funds and their specific rules. **Efforts should be sustained to reinforce and streamline further existing programming and implementation processes.**

Résumé exécutif

Contexte

Le Règlement portant Dispositions Communes (RPDC) (UE) 2021/1060 a regroupé huit fonds en gestion partagée sous un seul ensemble de règles pour renforcer et rationaliser le cadre législatif et améliorer les synergies entre la politique de cohésion, les affaires maritimes et les fonds de la Direction générale de la migration et des affaires intérieures (HOME). De plus, le RPDC amplifie les options de politique et de mise en œuvre pour mieux coordonner ces fonds et renforcer les synergies entre eux ainsi qu'avec d'autres fonds et instruments de l'UE, tels que la Facilité pour la reprise et la résilience (FRR), l'Instrument de soutien technique (IST), la Politique agricole commune (PAC, Fonds européen agricole pour le développement rural), Horizon Europe (HE), le Mécanisme pour l'Interconnexion en Europe (MIE), le Programme pour une Europe numérique (DIGITAL), le Fonds InvestEU, LIFE, Erasmus+, le programme «l'UE pour la santé» (EU4Health) et le Fonds européen d'ajustement à la mondialisation (FEM).

Le **but de cette étude** est d'évaluer dans quelle mesure les Autorités de gestion (AG) utilisent **les options de politique et de mise en œuvre 2021-2027** créées pour favoriser la **coordination et les synergies** entre les fonds du RPDC et entre ceux-ci et d'autres fonds et instruments de l'UE, tant au niveau stratégique qu'interventionnel.

Approche méthodologique

Complémentarité, coordination et synergie sont des termes largement utilisés dans le jargon de l'UE. Cependant, il n'existe pas de définition claire de ces termes, qui sont utilisés à la fois de manière synonyme et avec des significations différentes. Par conséquent, l'étude a développé une **taxonomie** pour détailler et catégoriser le concept de **chevauchement des politiques, de coordination, de synergies et de complémentarité**, aux niveaux stratégique et interventionnel.

- Le **chevauchement des politiques** est utilisé lorsque deux programmes/fonds/instruments partagent les mêmes domaines politiques et types de bénéficiaires.
- La **coordination** est définie comme la présence de dispositions institutionnelles/mécanismes administratifs ou procédures en place pour aligner la mise en œuvre des programmes/fonds/instruments. Un chevauchement des politiques sans coordination peut entraîner un manque de clarté et un risque de double financement.
- La **synergie** se produit lorsque deux fonds/instruments ou plus interagissent aux niveaux interventionnel et financier. Les synergies sont classifiées comme phasées (alternatives et séquentielles), concurrentes (combinées et cumulatives), démarcation et transfert.
- La **complémentarité** entre deux fonds/instruments se produit lorsque des mécanismes de coordination et des synergies sont établis. La complémentarité

n'existe donc que lorsqu'elle est assurée à la fois au niveau stratégique (coordination) et au niveau de l'intervention et financier (synergie).

La **couverture de l'étude** englobe 395 programmes régionaux et nationaux soutenus par des fonds du RPDC, les 27 Accords de partenariat (AP), les 27 Plans nationaux pour la reprise et la résilience (PNRR) soutenus par la FRR, et des fonds et instruments de l'UE sélectionnés. L'approche méthodologique comprend deux phases:

- La **recherche documentaire** vise à identifier les chevauchements de politiques, détecter les mécanismes de coordination et déterminer le type de synergies entre les programmes du RPDC, les fonds et instruments de l'UE et la FRR.
- Les **entretiens** avec 71 autorités responsables des programmes, principalement des Autorités de gestion (AG), ont fourni des informations qui ont non seulement complété l'analyse documentaire, mais ont également offert un aperçu précieux des données recueillies pour faciliter l'interprétation. De plus, cela a aidé à identifier des bonnes pratiques pour les mécanismes de soutien à la coordination entre les fonds et les options politiques pour mettre en œuvre les synergies.

Principales conclusions

Basé sur cette méthodologie, l'étude a recueilli des informations détaillées sur les chevauchements de politiques, les mécanismes de coordination et les synergies qui ont émergé de l'analyse documentaire et des entretiens avec les autorités responsables des programmes.

Premièrement, les **principaux éléments** qui ont émergé concernant le chevauchement des politiques incluent :

- **L'analyse des Accords de Partenariat a révélé des éléments clés de chevauchement des politiques entre les fonds du RPDC avec une intensité variable selon les domaines des politiques.** Un chevauchement significatif de politiques est observé dans la recherche et le développement et l'innovation (R&D&I), la connectivité numérique, la transition écologique et la compétitivité des PME. De plus, des domaines tels que l'intégration des ressortissants de pays tiers, l'accès aux services sociaux et les systèmes de santé démontrent un chevauchement de politiques moins intense entre plusieurs fonds. En ce qui concerne les fonds et instruments de l'UE, l'analyse souligne un chevauchement de politiques constant entre les fonds de la politique de cohésion dans la plupart des domaines politiques, avec des chevauchements récurrents entre les fonds du RPDC et la FRR, et d'autres fonds comme le FEADER, HE et LIFE.
- **La FRR se distingue comme un instrument clé dans la planification des synergies avec les fonds du RPDC** en raison de son large champ de financement (à la fois pour les réformes⁶ et les investissements) et des contraintes de temps.
- **L'analyse au niveau des programmes de 395 programmes** soutenus par un ou plusieurs des 8 fonds du RPDC a révélé des tendances dans le chevauchement des domaines des politiques, les mécanismes de coordination et les synergies identifiées. Le FEADER et le FEAMPA sont principalement combinés avec le FEDER et le FSE+,

⁶ L'analyse des réformes n'entrait pas dans le champ de cette étude.

tandis que des fonds sectoriels spécifiques comme HE, MIE et DIGITAL s'alignent principalement avec le FEDER et le FC. La coordination entre les programmes du RPDC et d'autres fonds et instruments de l'UE varie et est souvent influencée par le cadre institutionnel de chaque État membre. L'analyse synthétise les synergies entre **différents objectifs stratégiques (OS) et fonds et instruments de l'UE**, avec des chevauchements notables dans des domaines tels que la R&D&I, la transition écologique et la mobilité urbaine.

Les **aperçus clés suivants** ont émergé de la recherche documentaire et des données recueillies lors des entretiens avec les autorités responsables des programmes en lien avec les mécanismes de coordination en place pour favoriser les complémentarités entre les programmes du RPDC, d'autres fonds et instruments de l'UE et la FRR.

- Les **Accords de Partenariat (AP)** servent de documents stratégiques décrivant les mécanismes de collaboration entre divers fonds et programmes, avec des comités interinstitutionnels faisant souvent partie de ce cadre stratégique. La conception des AP est cruciale pour établir des mécanismes de coordination garantissant les synergies, surtout lors des premières étapes de la programmation. Les AP facilitent à la fois la coordination nationale descendante et les processus de consultation ascendante. Ils préparent le terrain pour des groupes de travail et des comités de pilotage, qui sont essentiels pour délimiter les lignes de démarcation et prévenir la duplication des efforts. Les AP facilitent également la coordination tant dans les phases de programmation que de mise en œuvre.
- **Concernant la coordination entre les fonds du RPDC**, le FSE+ et le FEDER démontrent le plus haut degré de coordination. Ils représentent également les fonds qui coordonnent le plus avec d'autres, souvent en co-mettant en œuvre dans des programmes multi-fonds, favorisant ainsi une coordination inhérente. Le FEDER se connecte avec le FC et le FTJ, tandis que le FSE+ coordonne avec les fonds HOME pour aborder l'intégration sociale et sur le marché du travail des ressortissants de pays tiers et des personnes les plus défavorisées. Le FTJ, en coordination avec le FEDER et le FSE+, aborde la décarbonation et le développement des ressources humaines locales pour atténuer les impacts de la transition écologique. Dans la plupart des cas, le Comité de suivi joue un rôle vital dans la coordination des fonds du RPDC, garantissant l'alignement stratégique à travers les programmes de l'UE. Composé de représentants de diverses parties prenantes, la composition diversifiée des Comités de suivi facilite une collaboration robuste et un échange d'informations. Cela améliore la synergie et prévient le chevauchement, influençant significativement la mise en œuvre effective et l'intégration de multiples flux de financement.
- **Concernant la coordination avec d'autres fonds et instruments de l'UE**, la majorité des répondants gérant des programmes du RPDC indiquent un certain niveau de coordination avec d'autres fonds et instruments de l'UE, mais près d'un tiers signalent un manque de coordination efficace. Les obstacles comprennent la complexité administrative, des efforts insuffisamment ciblés pour la coordination, une communication institutionnelle limitée et la poursuite d'objectifs de programmes distincts, entravant les actions synergiques potentielles. Dans l'ensemble, l'analyse révèle un paysage d'interaction multifacette. HE se distingue par sa coordination étendue avec le FEDER dans les secteurs de la recherche et de l'innovation. DIGITAL coordonne activement avec le FEDER, notamment dans les projets de transformation numérique, tandis que le programme LIFE coordonne avec le FEDER et le FTJ. Le FEDER et le FSE+ émergent comme centraux pour la coordination avec divers fonds. Les fonds HOME ne sont pas fréquemment mentionnés dans des interactions spécifiques avec d'autres fonds et instruments de l'UE. Le FEADER est mentionné moins souvent que prévu, en partie en raison du cadre légal et politique distinct et

différent (non couvert par le RPDC en 2021-2027) et de son intégration avec le FEAGA dans les plans stratégiques de la PAC pour cette période de programmation. L'efficacité du comité de suivi dans la coordination des fonds du RPDC avec d'autres fonds de l'UE varie selon l'instrument. Dans certains cas, le Comité de suivi intègre avec succès des programmes divers comme le FEDER et le FSE+ avec le soutien des points de contact nationaux de HE ou LIFE. Cependant, il lutte souvent pour assurer la coordination avec d'autres fonds.

- **Concernant la coordination avec la FRR** et les fonds de la politique de cohésion, seulement environ la moitié des PNRR fournissent une description claire des mécanismes prévus pour garantir la collaboration et la communication avec les programmes de politique de cohésion. Lorsqu'ils le font, il apparaît que les organes responsables de la gestion des PNRR sont dans de nombreux cas également chargés de la mise en œuvre des programmes de la politique de cohésion et ont tiré parti des leçons apprises des expériences et des modalités de mise en œuvre acquises. En ce qui concerne les AP, alors que l'analyse des AP indiquait une coordination très limitée et plutôt unilatérale des PNRR avec les fonds de la politique de cohésion (partiellement peut-être parce que la programmation des AP a été largement réalisée avant la programmation de la FRR), les entretiens avec les autorités responsables des programmes suggèrent qu'il existe des efforts de coordination en cours pour la plupart des programmes de politique de cohésion avec leurs homologues des PNRR. Cette divergence entre les résultats de l'analyse des AP et les entretiens est principalement attribuée à des difficultés dans l'interaction gouvernementale à différents niveaux, en particulier entre les organismes régionaux et nationaux. Dans certains cas, la coordination est limitée à la phase de conception du programme, se concentrant sur la définition des rôles et des responsabilités pour assurer une démarcation claire et une collaboration efficace entre les divers programmes. Des réunions régulières de haut niveau visent à aligner les objectifs et les stratégies, en mettant l'accent sur l'identification et l'utilisation des synergies. Cependant, la plupart des programmes étendent les efforts de coordination à la phase de mise en œuvre, surtout lorsque les PNRR et les programmes de politique de cohésion sont gérés par les mêmes autorités ou dans le même cadre institutionnel. Le Comité de suivi facilite la coordination entre les programmes du RPDC et les PNRR avec une efficacité variable. Sa composition diverse soutient l'échange d'informations et la collaboration, bien que son impact sur la synergie des fonds et la prévention des chevauchements soit perçu différemment parmi les autorités responsables des programmes.
- **Les défis pour atteindre une coordination efficace** peuvent être regroupés en défis généraux de coordination, problèmes spécifiques au cadre politique de l'UE et problèmes liés aux ressources :
 - Les défis généraux incluent la diversité des points de vue et des intérêts des parties prenantes, nécessitant la recherche de consensus et parfois des compromis.
 - Les problèmes spécifiques à l'UE comprennent la complexité accrue et les charges administratives de la coordination de multiples programmes et fonds avec des objectifs, des groupes cibles et des styles de gestion variés. Pour certaines AG, les principales difficultés rencontrées dans la mise en œuvre des synergies entre les fonds proviennent de la diversité des règles régissant chaque fonds, y compris le risque de double financement qui en découle, et du manque de communication et d'information claires de la Commission sur les possibilités et les modalités de mise en œuvre des synergies entre les différents fonds et instruments.

- Les contraintes de ressources, notamment en ressources humaines, entravent une planification et une mise en œuvre efficaces, surtout pour les programmes plus petits ou les États membres avec moins de ressources. Comprendre et aligner les différentes règles de financement et coordonner les diverses parties prenantes pour garantir que les synergies sont efficaces et produisent les résultats souhaités prend du temps et nécessite des ressources suffisantes. Dans ce contexte, le Comité de suivi sert d'instrument pivot pour renforcer la coordination. La composition du Comité de suivi, comportant un large éventail de parties prenantes de différents flux de financement et domaines de programme, facilite un échange d'informations et le développement de stratégies collaboratives. Cependant, l'impact du Comité de suivi varie, certaines autorités responsables de programme considérant son rôle de coordination comme limité ou même inexistant. Cette variation dépend souvent de la configuration spécifique du Comité de suivi et de l'intensité de l'intégration entre les fonds du RPDC et d'autres instruments de l'UE dans le périmètre géographique du programme.

Les **synergies** ont été analysées au niveau de l'intervention et au niveau financier (c'est-à-dire les transferts entre les programmes du RPDC et d'autres fonds et instruments de l'UE). Voici les principales conclusions qui ont émergé de la recherche documentaire et des entretiens concernant les synergies au niveau des projets :

- **Concernant les fonds du RPDC**, la synergie prédominante identifiée est entre le FEDER et le FSE+. Cela découle de la nature de ces deux fonds, qui couvrent un large éventail d'interventions complémentaires. L'analyse révèle également que la synergie entre ces fonds est principalement classée comme combinée, à savoir lorsque deux interventions différentes ayant le même objectif et les mêmes groupes cibles sont soutenues par deux fonds ou plus. Typiquement, le FEDER finance l'achat d'équipements, la rénovation ou la construction de bâtiments, tandis que le FSE+ se concentre sur l'investissement en capital humain. Cela souligne comment une interaction synergique est plus efficacement créée lorsque deux fonds collaborent sur différents aspects de la même intervention. Dans le cas des programmes de fonds HOME, la plupart des synergies sont observées entre les fonds HOME et le FSE+. Cela est souvent dû à la nature des fonds, c'est-à-dire la nature de la politique attribuée à chaque instrument et leur conception au niveau de l'UE et national.
- **Concernant les synergies avec d'autres fonds et instruments de l'UE**, les synergies les plus fréquentes avec les programmes du RPDC sont trouvées avec HE, particulièrement avec le FEAMPA et le FEDER. D'après l'analyse documentaire, 84 % des programmes FEAMPA et 71 % des programmes FEDER envisagent une certaine forme de synergie. Les entretiens confirment cette tendance, avec HE se concentrant typiquement sur les étapes initiales de recherche et les programmes du RPDC sur les applications commerciales. Un autre exemple est le Label d'Excellence, où la préparation du projet se déroule sous HE, et le financement de la mise en œuvre du projet est fourni par le FEDER en raison des contraintes budgétaires des appels HE. LIFE se positionne comme le deuxième le plus utilisé pour créer des synergies, principalement avec le FEAMPA (40% des programmes mentionnant une synergie) mais aussi avec le FEDER (37%) et le FTJ (31%). Le FEADER établit également de multiples synergies, notamment avec le FEAMPA (40%) et le FEDER (36%). Cependant, en raison de sa coopération de longue date, des niveaux de synergie plus élevés étaient attendus. Les entretiens révèlent que créer des synergies avec le FEADER est devenu plus difficile puisqu'il n'est plus inclus dans le même règlement du RPDC. Erasmus+ est pertinent en termes de synergies, surtout avec le FSE+ (39%), tandis que DIGITAL établit fréquemment des synergies avec le FEDER (39%). Un des outils les plus courants pour assurer des synergies avec d'autres fonds et

instruments de l'UE sont les critères de sélection. Par exemple, DIGITAL se concentre sur la réduction de la fracture numérique en ciblant les zones mal desservies, tandis qu'InvestEU privilégie les projets à haut risque qui complètent les fonds traditionnels comme le FEDER et le FC. Le FEADER évite d'intervenir là où les programmes de la politique de cohésion le font, sauf dans des domaines stratégiques comme le haut débit, améliorant l'efficacité des fonds et l'impact ciblé.

- **En ce qui concerne les synergies avec les PNRR**, la situation est plutôt mitigée. Si la majorité des programmes de politique de cohésion indiquent des synergies potentielles avec les PNRR, certains PNRR et programmes fournissent seulement des informations limitées sur les synergies prévues. Lorsque des synergies potentielles sont mentionnées, elles peuvent être de différents types. Des synergies concurrentes sont évidentes lorsque les fonds de la politique de cohésion complètent les réseaux d'infrastructures financés par la FRR et les initiatives dans des domaines d'actions telles que la politique industrielle, le transport, les infrastructures environnementales, les communautés d'énergie renouvelable, la santé et l'éducation. Des synergies par phases émergent en raison des durées de mise en œuvre différentes des PNRR et des programmes de politique de cohésion. Les projets initiés par les PNRR anticipent souvent leur achèvement par les fonds de la politique de cohésion, facilitant un flux de ressources continu et une exécution de projet fluide. La démarcation est le type de synergie le plus courant, que l'on retrouve dans des critères thématiques, géographiques ou temporels. Par exemple, alors que les PNRR gèrent des projets de courte durée, les fonds de la politique de cohésion prennent en charge des initiatives plus prolongées et plus étendues, assurant l'alignement du projet avec les calendriers respectifs et les capacités de chaque source de financement, permettant ainsi une allocation efficace des ressources.
- **La phase de programmation** est cruciale pour poser les bases des synergies entre tous les fonds et instruments. Elle implique des consultations des parties prenantes, des discussions stratégiques avec diverses autorités, et la clarification de la portée de l'interconnexion des projets. Une identification insuffisante des synergies pendant cette phase pourrait rendre leur réalisation difficile ultérieurement.
- **En ce qui concerne les synergies au niveau financier**, à savoir les transferts financiers entre les programmes du RPDC et entre ceux-ci et d'autres fonds et instruments de l'UE ainsi que les contributions à InvestEU, leur utilisation semble assez limitée, en particulier des programmes du RPDC vers d'autres fonds et instruments de l'UE. Parmi les Fonds du RPDC, le total des transferts décidés au moment de l'analyse s'élève à 7,54 milliards d'EUR. En particulier, 11 États membres ont approuvé un transfert entre le FEDER et le FSE+ (dans les deux sens, pour un montant total de 2,66 milliards d'EUR), sept États membres entre le FEDER/FSE+ et le FC (dans les deux sens, 3,70 milliards d'EUR), un État membre du FEDER/FSE+ vers le FTJ (545 millions d'EUR), un État membre du FC vers le FEAMPA (14 millions d'EUR) et un État membre du FEDER/FSE+/FC/FEAMP vers le IGFV (621 millions d'EUR). En ce qui concerne les transferts vers d'autres fonds de l'UE et instruments et les contributions à InvestEU, le total des transferts décidés au moment de l'analyse s'élève à 312,7 millions d'EUR – à comparer avec un maximum autorisé par les règlements d'environ 18 milliards d'EUR: deux États membres ont approuvé un transfert du FEDER vers HE (23,5 millions d'EUR), un État membre du FSE+ vers Erasmus+ (57 millions d'EUR), et quatre États membres ont fait une contribution des programmes du RPDC à InvestEU (232,2 millions d'EUR). Lors d'entretiens avec les autorités responsables des programmes au printemps-automne 2023, la plupart des AG n'envisageaient pas de transferts financiers supplémentaires à ce stade de la mise en œuvre du programme, ni n'étaient certaines de la possibilité d'utiliser cette option à l'avenir. Finalement, une analyse des documents de travail et des plans stratégiques

d'autres fonds et instruments de l'UE révèle un manque de directives spécifiques sur la manière dont ces ressources seraient utilisées, à l'exception du Mécanisme pour l'interconnexion en Europe (MIE). Par conséquent, la valeur ajoutée des transferts n'a pu être démontrée sur la base du matériel de recherche de cette étude.

Conclusions et recommandations

L'étude explore la complémentarité sous deux perspectives distinctes: la coordination (entre fonds et programmes) et la synergie (entre projets).

La **coordination** est cruciale non seulement pour amplifier l'impact et les résultats, mais aussi pour renforcer la performance des programmes. Cependant, le chemin vers une coordination efficace est semé de défis. Ceux-ci vont de la réconciliation des intérêts des diverses parties prenantes à la navigation dans le cadre politique complexe de l'UE et à la résolution des limitations de ressources et de capacités. En particulier, la variation des exigences administratives et des objectifs stratégiques entre différents fonds tels que le FEDER, le FSE+ et le FAMI complique les efforts de coordination. De plus, aligner les priorités de (réforme et) investissement (et les mettre en œuvre dans le cadre des PNRR) sur des programmes qui existent de longue date nécessite une planification minutieuse pour assurer des efforts synchronisés et éviter les désalignements d'objectifs. Malgré ces obstacles, la coordination structurée reste une pratique courante, avec un rôle important joué par les Comités de suivi, bien qu'avec une profondeur et une cohérence variables selon les types de coordination.

La **synergie** dans les programmes de l'UE, particulièrement entre les fonds du RPDC et d'autres fonds de l'UE, joue un rôle pivot pour renforcer l'impact et l'efficacité des interventions. L'analyse révèle que le travail pour fonder une synergie efficace se produit lors de la programmation initiale. A cet égard, des consultations stratégiques et une planification détaillée assurent que les ressources de divers programmes sont alignées et utilisées de manière optimale, évitant la duplication et maximisant l'impact. Cependant, atteindre ces synergies n'est pas sans défis. Les principaux obstacles incluent des charges administratives significatives et la nature complexe de la coordination de multiples fonds avec des réglementations diverses. Ces défis soulignent la nécessité de processus plus rationalisés et de mécanismes de soutien tels que des bases de données pour faciliter une planification et une mise en œuvre plus aisées pour renforcer les synergies.

Globalement, la nouvelle possibilité **de transférer des ressources entre les fonds du RPDC et d'autres fonds de l'UE** n'a pas significativement renforcé la complémentarité en raison de plusieurs facteurs, surtout à cause d'un manque de familiarité avec les mécanismes de transfert et de leur complexité, qui ont dissuadé leur utilisation. Une meilleure diffusion des informations sur les avantages et les inconvénients des transferts financiers, comme appris de Horizon Europe, pourrait encourager leur adoption un peu plus large et améliorer la complémentarité entre les flux de financement de l'UE. Les allocations budgétaires modestes pour les programmes de politique de cohésion dans certains États membres ou régions limitent la portée des transferts financiers. Les autorités responsables des programmes évitent souvent les transferts, craignant que les besoins financiers dépassent les fonds disponibles, surtout lors de la gestion de fonds plus petits.

Les **conclusions** de l'étude sur la coordination et la synergie convergent en indiquant que la complémentarité est principalement obtenue grâce à une conception minutieuse des programmes, qui comprend l'élaboration d'une vision pour des secteurs et des régions spécifiques. Cela signifie que pour une complémentarité efficace, outre un cadre politique et juridique stable et prévisible (qui soutienne les mesures correspondantes), la complémentarité

doit être activement planifiée et intégrée dans les programmes et des approches conjointes doivent être adoptées dès le départ. Une programmation efficace inclut également une analyse approfondie des besoins et une implication active des parties prenantes. Cela permet aux autorités responsables des programmes de mettre en place des mécanismes de coordination entre différents fonds et instruments dès un stade précoce. Finalement, une bonne programmation mène à la complémentarité, c'est-à-dire que la complémentarité fonctionne lorsqu'elle est alignée avec les objectifs du programme. Dans ce contexte, des systèmes de données solides devraient être davantage développés afin d'éviter les chevauchements dans l'utilisation du soutien de divers fonds ou instruments ou d'optimiser leur utilisation conjointe, lorsque cela se justifie. Cela devrait également apporter une transparence accrue aidant les autorités de gestion et d'autres organismes ainsi que les Comités de suivi dans leur travail.

D'autre part, la **complémentarité**, tant en termes de coordination que de synergies, est plus difficile à atteindre au niveau de la mise en œuvre, si elle n'a pas été conçue stratégiquement pendant la phase de programmation antérieure. Dans de tels cas, la poursuite de la complémentarité devient au cas par cas, sporadique et lourde. Par conséquent, les autorités responsables des programmes sont tenues d'ajuster leur programmation et d'établir de nouveaux mécanismes en termes de coordination et de synergies. Dans ce contexte, des leçons pourraient être apprises concernant les programmes de la politique de cohésion et les PNRR où les défis pour atteindre la complémentarité proviennent largement de la préparation des nouveaux programmes de politique de cohésion ayant été bien avancée lorsque les PNRR ont été adoptés.

Le cadre de programmation de la politique de cohésion permet déjà aux autorités nationales et régionales responsables des programmes de développer la complémentarité. En effet, le système unique de programmation et de mise en œuvre est assez flexible pour intégrer des ressources à différents niveaux. Dans ce contexte, les autorités de programme et les Comités de suivi ont également prouvé être des moteurs efficaces de la coordination. Importamment, à travers des stratégies territoriales intégrées (c'est-à-dire le Développement Local Mené par les Acteurs Locaux (DLAL) et les Investissements Territoriaux Intégrés (ITI)), les programmes de la politique de cohésion permettent aux acteurs locaux d'atteindre la complémentarité depuis la base.

Cependant, il existe des défis qui compromettent la réalisation des synergies. Outre les problèmes généraux (qui sont communs dans la livraison des politiques que ce soit au niveau de l'UE, national, régional ou local), il y a des problèmes spécifiques à la politique de cohésion de l'UE qui sont principalement liés à l'existence de:

- **Plusieurs programmes** dans chaque région ou secteur nécessitant des efforts pour coordonner différents programmes.
- **La prolifération d'instruments** avec leurs cadres réglementaires différents et la multiplication des priorités politiques, ce qui augmente la complexité.
- **Un manque de capacité administrative**, également dû à un temps de programmation réduit.

Tous ces facteurs détournent l'énergie et l'attention des autorités responsables des programmes de la conception de stratégies efficaces, c'est-à-dire l'optimisation de l'utilisation des ressources à travers les complémentarités. Par conséquent, pour améliorer la complémentarité entre les fonds, il serait utile d'avoir un cadre réglementaire global plus simple pour permettre aux Autorités de gestion de se concentrer sur la qualité de la programmation. Cela implique de réduire le nombre de programmes pour les mêmes régions/territoires pour une meilleure coordination, de limiter le nombre d'instruments de

financement ou au moins d'avoir des règles de programmation et de mise en œuvre véritablement uniques, de rétablir l'évaluation ex-ante et de donner aux autorités responsables des programmes les moyens de renforcer leurs capacités. Cela signifie également maximiser l'utilisation des instruments et cadres déjà existants (AP, programmes, ITI, DLAL) en améliorant la fonction de planification stratégique et de coordination des politiques qu'ils peuvent remplir - au lieu d'introduire de nouveaux mécanismes en aval du processus de programmation. Ce risque devient finalement plus lourd pour les autorités responsables des programmes plutôt que d'augmenter la complémentarité.

Les recommandations fournies sont conçues pour améliorer davantage le cadre global du RPDC, qui a prouvé sa capacité à assurer la complémentarité à travers les outils existants, mais il y a encore des marges d'amélioration.

Des changements substantiels entraîneront probablement un nouveau processus d'apprentissage pour les Autorités de gestion et pourraient impliquer une charge de travail et des ressources supplémentaires, tandis que les Autorités de gestion doivent se concentrer sur la qualité de la programmation. Par conséquent, il serait préférable de continuer avec les structures et cadres existants. Cependant, des recommandations spécifiques sont fournies pour améliorer continuellement le cadre existant. Ces recommandations ciblent tous les niveaux de gouvernance de la politique de cohésion de l'UE (européen, national et spécifique au programme) et peuvent être catégorisées en trois types :

- **Réglementaire:** assurer un cadre unifié pour tous les fonds en gestion partagée, en utilisant une terminologie standardisée pour différents fonds et instruments. De plus, un unique document de programme multi-fonds couvrant une région ou un secteur et incluant tous les fonds devrait être requis.
- **Intégration des politiques en amont et gouvernance:** Utiliser des outils existants pour renforcer la complémentarité a prouvé son efficacité dans l'amélioration de la coordination entre les programmes, avec un cadre stratégique intégré, le rétablissement de l'évaluation ex-ante et l'implication active des parties prenantes. Les Comités de suivi conjoints sont des exemples pour cela et renforcer le rôle de coordination des comités de suivi devrait être exploré, notamment pour les Comités de suivi liés aux programmes régionaux. En termes de synergies, le DLAL et l'ITI peuvent agir comme des catalyseurs pour que les acteurs locaux optimisent l'utilisation des fonds dans les stratégies territoriales de développement local.
- **Activités spécifiques de renforcement des capacités:** Exploiter des schémas existants de l'UE (par exemple, les programmes "Peer learning" (apprentissage par les pairs) de la DG REGIO ou les programmes INTERREG) et organiser un soutien pour les bénéficiaires à travers des orientations, incluant une matrice de complémentarité.

La conclusion de l'étude est que la politique de cohésion, à travers son cadre de programmation et de gouvernance, offre déjà un cadre plutôt bon pour améliorer la complémentarité non seulement au niveau de l'autorité responsable des programmes mais aussi au niveau des bénéficiaires, à condition que certaines conditions soient remplies, notamment une stratégie globale minutieuse et une conception de programme en amont. Cependant, ce potentiel de complémentarité est soumis à divers défis, tels que l'utilisation de multiples fonds et leurs règles spécifiques. **Les efforts devraient être soutenus pour renforcer et rationaliser davantage les processus de programmation et de mise en œuvre existants.**

Introduction

Background and objectives of the study

In the 2021-2027 programming period, Member States (MSs), local and regional authorities (LRAs), enterprises and citizens may benefit from a broad portfolio of policy delivery tools offered by EU funds, implemented either via shared or direct/ indirect management.

The expansion of EU instruments and funds is partly in response to the need to address two **unprecedented crises**: the COVID-19 pandemic and the energy and refugee crisis resulting from the Ukrainian war.

A significant number of these instruments and funds **share the same policy areas and intersect with each other**. There is, therefore, enhanced flexibility and the possibility to concentrate resources, but, at the same time, this requires a major effort to coordinate, build complementarity and seek synergies. Indeed, the 2021-2027 Common Provisions Regulation (CPR) (2021/1060, Art.5/3)) explicitly demands MSs and the European Commission (EC) to promote “*coordination, complementarity and coherence between the Funds and other Union instruments and funds*”.

The issue of ensuring complementarity, coordination, and synergy has been a constant in EU cohesion policy history and the object of studies, analysis and debate. The political, economic and social strategic vision to increase the coherence of EU funding by exploiting synergies and complementarities was highlighted in the 2014-2020 programming period.

However, in **the 2014-2020 period**, despite the efforts to strengthen coherence and complementarity between Funds and policies, the rules in force and differences in Fund-specific regulations limited potential complementarity and synergies between the funds. Furthermore, governance arrangements to address and pursue synergies were only partially developed and adopted. Although initiatives such as smart specialisation strategies (S3) were created and enhanced synergy and complementarity, the overall integration of the funds remained problematic when seen from a Managing Authority (MA) perspective. In this sense, the EC study of 2018 ⁽⁷⁾ had already highlighted the improvements in policy development in relation to coherence, complementarity and coordination across the ESI Funds and other EU instruments, but coordination in implementation remained a challenge. Despite the amendments compared to the regulatory framework for the 2014–2020 period to encourage greater harmonisation, some regulatory variations, and in specific cases, differences in rules and processes between funds, continued to limit integrated implementation.

Overall, the 2014-2020 programming period showed that potential positive impacts from complementarity can be achieved through better coordination, the synergistic implementation of ESI Funds, and better coordination and integration with other EU instruments. The 2021-2027 CPR favours the setup of structured coordination to ensure the creation of ad hoc mechanisms at financial, strategic programming, governance and implementing mechanism levels. For instance:

- At the **strategic level**, the Partnership Agreements (PAs) have to include explanations on: ‘coordination, demarcation and complementarities between the funds and, where appropriate, coordination between national and regional programmes’⁸; ‘complementarities and synergies between the funds covered by the Partnership Agreement, Asylum, Migration and Integration Fund (AMIF), Internal Security Fund (ISF), Border Management and Visa Instrument (BMVI), and other

⁽⁷⁾ European Commission (2018), *Study on the coordination and harmonisation of ESI Funds and other EU instruments*.

⁽⁸⁾ CPR Art. 11(1)(iii).

Union instruments, including LIFE strategic integrated projects and strategic nature projects, and, where appropriate, projects funded under Horizon Europe' ⁽⁹⁾, and the Recovery and Resilience Facility (RRF). In the 2014-2020 programming period, some CPR articles (art. 4, 10, 52, 96) and Annex I mentioned the need to ensure coordination among the ESI Funds and between the ESI Funds and other relevant EU policies. The concept of synergy and complementarity are envisaged in article 96, 'Content, adoption and amendment of operational programmes under the Investment for growth and jobs goal', and in Annex I dedicated to the Common Strategic Framework and established to provide strategic guiding principles to facilitate the programming process and the sectoral and territorial coordination of Union intervention under the ESI Funds and with other relevant Union policies and instruments (specifically, in the parts on 'Integrated approach to and arrangements for the use of the ESI funds' and on "coordination and synergies between ESI Funds and other Union policies and instruments"). However, the attention dedicated to complementarity, synergies and coordination was enhanced in the 2021-2027 CPR and in the Fund-specific regulations. Synergies and coordination among CPR and non-CPR funds are actively encouraged, and the EC has also disseminated guidelines to provide examples of synergies among funds and instruments, such as those between the ERDF and HE, CEF, DEP, LIFE, ERASMUS+. Section 2 of the PA is specifically dedicated to describing coordination, demarcation and complementarities. Additionally, each Programme (PR) should indicate, together with the investment needs, the complementarities and synergies with other forms of support while defining the overall strategic approach. Furthermore, concerning the transfers, to be approved in the PA or in a programme amendment, the PR has to describe all transfers to other CPR funds or direct/indirect managed EU funds and instruments. In the 2014-2020 programming period, national and regional authorities in charge of Cohesion Policy programmes did not have to specify such details in both the PA and PR. They also did not have to elaborate on the mechanisms of coordination and synergies among CPR programmes and other EU funds and instruments.

- At the **implementation level**, territorial strategies such as Community Led Local Development (CLLD) and Integrated Territorial Investments (ITIs) are means to integrate different CPR funds and the European Agricultural Fund for Rural Development (EAFRD), pursuing local and urban development. Moreover, financial instruments can be set up using different CPR funds and other EU resources to achieve relevant economies of scale. A MS may also, on its initiative, set up a coordination body to liaise with and provide information to the EC and coordinate the activities of the programme authorities. Additionally, the ERDF and ESF+ may finance, in a complementary manner and subject to a limit of 15% (it was 10% in the 2014-2020 CPR) of the support from ERDF and ESF+ for each priority of a programme, all or part of an operation for which the costs are eligible for support from the other fund on the basis of the eligibility rules applying to the fund, provided that said costs are necessary for the implementation. Finally, synergy and complementarity between HE, LIFE, ERASMUS+, the Digital Europe Programme (DEP), the Connecting European Facility (CEF) and CPR funds can be achieved through the implementation of the Seal of Excellence (SoE). Where a programme provides support from the ERDF or the ESF+ to a programme co-funded by HE, in line with its objectives, the body implementing the programme co-funded by HE shall be identified as an intermediate body by the managing authority of the relevant programme ⁽¹⁰⁾.
- At the **financial level**, the CPR offers the possibility, within certain limits and conditions, to opt for the transfer of resources among CPR Funds and between CPR funds and other EU instruments under direct and indirect management. It also allows contributions to the InvestEU Fund. In the 2024-2020 programming period,

⁽⁹⁾ Ibidem.

⁽¹⁰⁾ Commission notice (2022/C 421/03) on Synergies between Horizon Europe and ERDF programmes.

financial transfer was not permitted between funds ⁽¹¹⁾⁽¹²⁾, and it was possible to transfer resources between different categories of regions only in duly justified circumstances. On the contrary, the 2021-2027 programming period allows for greater flexibility in terms of the quantity and type of those transfers.

Considering this framework, **the study aims to assess to what extent the MAs use the 2021-2027 policy and implementation options created to favour coordination and complementarities among CPR funds and complementarities and synergies between these and other EU funds and instruments provided in the CPR, both at a strategic and implementation level.** More specifically, the objectives of the study include the assessment of:

- 1) **the degree of demarcation and complementarities among the CPR funds and between CPR funds and other EU funds** under direct and indirect management from the point of view of PAs and PRs, as well as from the perspective of work programmes and the strategic plans in force;
- 2) **the financial complementarities and impact to be achieved and the justification of financial transfers foreseen by the CPR provisions;**
- 3) **the strategic complementarities between cohesion policy funds and the RRF**, focusing on the coordination mechanisms set up in MSs between the two instruments and the demarcation of the respective project pipelines.

The final scope of the study is to contribute to the analytical foundation for the post-2027 Cohesion policy and related impact assessments.

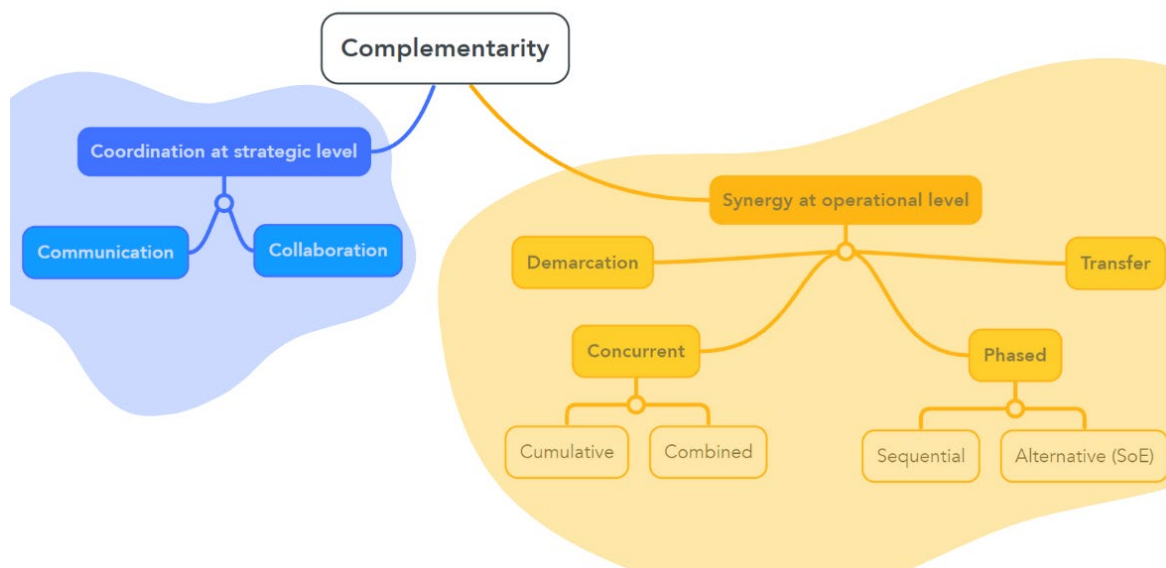
Establishing definitions

Complementarity, coordination and synergy are widely used terms in EU jargon. For instance, in the CPR legislative package, these terms are named several times and in different sections. However, there is no clear definition of these terms, which are used both synonymously and with different meanings. Moreover, the assessment of complementarity, coordination and synergy relies on qualitative judgement as there are no established methods/scales of value assuring objectivity.

⁽¹¹⁾ The only exception was a transfer from the Cohesion Fund to the Connecting Europe Facility as indicated in the regulation.

⁽¹²⁾ The rules have been amended at the end of the programming period to help face the consequences of the COVID-19 pandemic.

Figure 1. Complementarity at strategic and operational levels

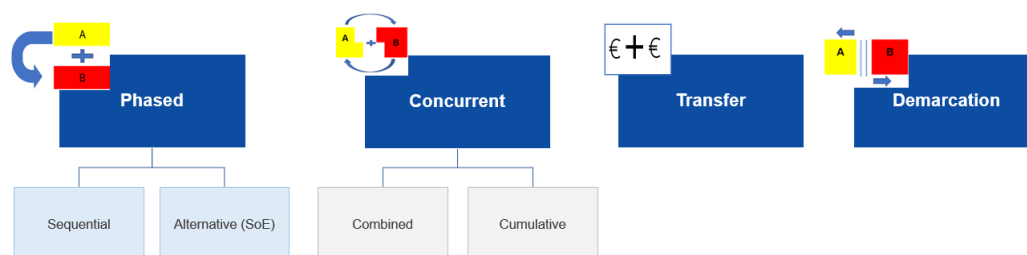


Source: Consortium elaboration

To deal with these limitations, the methodological approach of this study has adopted a set of definitions, as illustrated in the above figure:

- There is **complementarity** between two funds/instruments when both coordination mechanisms and synergies are established. Therefore, complementarity only exists when it is ensured at both the strategic level (coordination) and the operational level (synergy).
- **Coordination** includes:
 - **Collaboration**, i.e. the existence and effectiveness of a specific arrangement/organisation/routine to coordinate the programme with other programme(s)/fund(s)/instrument(s).
 - **Communication**, i.e. the existence of processes and procedures ensuring the exchange of information and data among separate bodies in charge of managing different programme(s)/fund(s)/instrument(s).
- A **synergy** occurs when two or more funds/instruments interact at the intervention level.

Figure 2. Classification of synergies



Source: Consortium elaboration.

Synergies are classified into four categories:

- **Phased**, which operates on the principle that interventions unfold in distinct stages while adhering to a unified strategic direction and scope. This category ensures that each phase not only aligns with the overarching goals but also leverages the accomplishments of previous stages. Two sub-categories of phased synergies can be further distinguished. **Sequential** synergy happens when an intervention under one programme/ fund/ instrument follows up on another under a different programme/ fund/ instrument or leads to or facilitates another intervention that would otherwise not have happened. In such cases, timing plays a central role ⁽¹³⁾. The second sub-category is represented by **alternative** synergy, which corresponds to the **SoE**. According to Commission notice (2022/C 421/03) on synergies between the HE and ERDF programmes ⁽¹⁴⁾, the SoE is a quality label awarded by the Commission to a proposal submitted to a competitive call for project proposals under an EU instrument. The label indicates that the proposal meets the minimum quality requirements ⁽¹⁵⁾, but could not be funded due to budgetary constraints. The SoE allows the proposal to receive support from other EU funding sources, such as the ERDF ⁽¹⁶⁾. However, the acquisition of SoE does not guarantee automatic support from the MA. It is, in fact, the MA's decision whether to provide funding. Should the MA choose to do so, this is defined as alternative funding.
- **Concurrent**, which is based on the principle that such synergistic interactions unfold simultaneously, aiming to harness and amplify synergies towards a unified goal. Unlike the 'phased synergy', a 'concurrent synergy' involves the strategic integration of outputs and/or financial resources from various sources at the same time. This aims to boost the overall effectiveness and impact of the initiatives involved. Two sub-categories can be further distinguished. **Combined** synergy refers to support from more than one source of the EU budget for two separate projects/operations linked by a common objective ⁽¹⁷⁾. Support for interventions should be provided in parallel and may have different natures, e.g., different forms of support (grant vs. financial instrument/loan). The different intervention outputs should generate a greater added value. **Cumulative** synergy, instead, allows the same project/operation to be supported by funding from two different sources of the Union budget, provided that the funding does not cover the same cost to avoid double funding ⁽¹⁸⁾.
- **Transfers** and contributions to the budgetary guarantee, based on the possibility, foreseen in the regulatory framework, that allow Member States to request, in the

⁽¹³⁾ An example of sequential synergy can be seen in the interventions supported by the AMIF and ESF+ programmes. Interventions to support the integration of third-country nationals in the new socio-cultural environment are initially supported by the AMIF programme, as it intervenes in the early stages of the integration process. Thereafter, the ESF+ funded projects can provide third-country nationals with tools and instruments to enter the labour market and access quality employment.

⁽¹⁴⁾ OJ C 421.4.11.2022.

⁽¹⁵⁾ The definition of the Seal of Excellence (SoE) written in the table is taken from the CPR Regulation, the Regulation 2021/695 establishing Horizon Europe defines the SoE as: 'a quality label which shows that a proposal submitted to a call for proposals exceeded all of the evaluation thresholds set out in the work programme, but could not be funded due to lack of budget available for that call for proposals in the work programme and might receive support from other Union or national sources of funding;

⁽¹⁶⁾ An example of alternative synergy relates to the use of the SoE within the framework of the ERDF and HE programmes: R&D projects that are unable to secure funding in HE, but have been awarded the SoE, may still receive funding from the ERDF programme, contingent upon a favourable decision by the MA.

⁽¹⁷⁾ An example of combined synergy can be seen between the ERDF and ESF+ programmes: The ERDF programmes can support interventions promoting SME competitiveness and company digitalisation, while the ESF+ can fund training for workers in these areas.

⁽¹⁸⁾ An example of cumulative funding can be seen in the DEP and ERDF support for European Digital Innovation Hubs (EDIHs). EDIHs are a joint investment of the EU and the MS, as well as the countries associated with the Digital Europe Programme. This joint investment is reflected in the two-stage selection process described in the DEP Regulation (EU) 2021/694. In the first stage, Member States select and shortlist candidate entities. In the second stage, the Commission selects entities from this list to comprise the network of EDIHs. The selection criteria include relevance, implementation and impact, as well as geographical, sectorial and technological coverage objectives, on top of the available budget per country. The DEP co-finances selected grants with a maximum of 50 %, and Member States may co-finance the remaining portion through the ERDF.

PAs or in a request for an amendment to a programme, a transfer of funding, up to established ceilings ⁽¹⁹⁾, from one fund to another fund(s) or to another instrument under direct or indirect management.

- **Demarcation**, which happens when the programme has identified demarcation criteria for interventions of the same nature with the same implementation time to avoid duplication of similar projects and double funding. In this case, the programme may indicate that interventions outside its scope could be financed by another programme/fund/instrument. This is about delineating clear boundaries between various funding sources without actively engaging in the coordination of actions for enhanced integration ⁽²⁰⁾. Demarcation focuses on the preliminary identification of which funding source is most appropriate for specific interventions, thereby ensuring streamlined efforts without the active pursuit of integrated, collaborative enhancements.

More details on the definition of synergies are presented in Annex A1.

Finally, one last term used in the study is **policy overlap**. This is used when two programmes/funds/instruments share the same **policy areas** and type of **beneficiaries**. The concept is applied to check that the possible overlap does not lead to risks of unclarity and double funding, i.e. when programmes/funds/instruments have the same policy areas and type of beneficiaries, but the level of coordination is absent or low and/or the type of interventions is not clearly identified (and, therefore, it is not possible to identify the type of synergy). The following table illustrates the twelve policy areas ⁽²¹⁾ and the types of beneficiaries considered.

Table 1. Policy areas and beneficiaries considered in the analysis

Policy areas	Beneficiaries
<ul style="list-style-type: none"> • Research and Innovation • Digital connectivity • SME competitiveness • Green transition • Climate change and adaptation • Transport networks and urban mobility • Employment and labour market • Education, training and skills • Access to social services • Access to health care system • Integration of third-country nationals, including migrants, refugees, asylum seekers • Local and urban development (excl. Mobility and transport) 	<ul style="list-style-type: none"> • Large enterprises • SMEs Research centres / Universities • NGOs / Third sector entities • Municipalities • Local public institutions • Regional institutions / dev. Agencies • National institutions • National agencies • Public utilities • Financial intermediaries • Individuals

Source: Consortium elaboration

⁽¹⁹⁾ Up to 5% of the initial national allocation of each Fund to any other instrument under direct or indirect management; up to 5% of the initial national allocation of each Fund to another Fund or Funds; an additional transfer of up to 20% of the initial national allocation by Fund between the ERDF, the ESF+ or the Cohesion Fund within the Member State's global resources under the Investment for jobs and growth goal. Moreover, the Member States whose average total unemployment rate for the period 2017-2019 is under 3 % may request an additional transfer of up to 25 % of the initial national allocation. Also, Member States may allocate, in the PA, an amount of up to 2 % of the initial national allocation for the ERDF, the ESF+, the Cohesion Fund and the EMFAF, respectively, to be contributed to the InvestEU Programme and delivered through the EU guarantee and the InvestEU Advisory Hub in accordance with Article 10 of the InvestEU Regulation. Member States, with the agreement of the managing authority concerned, may further allocate an amount of up to 3 % of the initial national allocation of each of these Funds after 1 January 2023 through one or more programme amendment request. All in all, the sum of the transfers and contributions shall not exceed 5% of the initial national allocation for each Fund.

⁽²⁰⁾ Examples of demarcation can be seen in the ERDF and EMFAF programmes: the ERDF can finance sea and river ports, including upgrading and equipment for port infrastructure and digitalisation, while the EMFAF only supports fishing ports.

⁽²¹⁾ Based on a cross-matching of the Specific Objectives (as defined by Art. 3 of ERDF Regulation, Art. 4 of ESF+ Regulation), the CPR policy objectives (Art. 5 of CPR) and the RRF Pillars Regulation.

Overall methodological approach

Complementarity, coordination and synergies have been analysed:

- among CPR funds;
- between CPR funds and other EU programmes/instruments;
- both at the strategic and implementation level.

The analysis has considered:

- all 27 PAs;
- 395 Programmes financed by the CPR funds ⁽²²⁾;
- the Work Programmes (WPs), strategic plans and regulations in place in the case of EU funds and instruments, and the Recovery and Resilience Facility (RRF), which supports the implementation of the 27 National Recovery and Resilience Plans (NRRPs).

All the CPR funds under Regulation (EU) 2021/1060 and ten EU funds and instruments have been included in the analysis (see table below).

Table 2. CPR funds and EU funds and instruments considered in the analysis

CPR funds	EU funds and instruments
<ul style="list-style-type: none"> • ERDF • ESF+ • CF • JTF • EMFAF • AMIF • ISF • BMVI 	<ul style="list-style-type: none"> • Technical Support Instrument (TSI) • EAFRD • HE • CEF • DEP • InvestEU Fund • LIFE • EU4Health Programme • European Globalisation Adjustment Fund (EGF) • Erasmus+

Source: Consortium elaboration

In addition to the EU funds and instruments mentioned in the table above, the analysis investigates coordination mechanisms and synergies between the Cohesion Policy and the 27 NRRPs implemented via the RRF. Considering the tender specifications, thus the structure of the report, and the peculiar interlinkages of the RRF with Cohesion Policy, the RRF, as an EU fund, is assessed separately for the purpose of this study.

The study was based on two main phases: the desk research (first phase) and interviews (second phase).

The main scope of the **desk research** was the preliminary identification of the risk of overlap between two programmes/funds/instruments. Therefore, it included three key activities:

- Policy area mapping to assess the policy overlap;

⁽²²⁾ Three programmes were not included in the analysis because they were adopted or became available in the SFC database after the cut-off date of February 28, 2023 agreed for the documental analysis. Those programmes are: Brussels Capital Region, ERDF (Belgium), Saint Martin, ERDF (France), and Slovakia – EMFAF.

- Identification of the level of coordination;
- Analysis of the type of interventions to assess synergies.

The policy area mapping activity included three main steps:

- identification of the type and number of policy areas covered by each programme/fund/instrument;
- for each identified policy area, identification of the type and number of target groups covered;
- for each identified policy area and target group, identification of the form(s) of support used.

The second activity consisted of an analysis of the coordination structures, i.e., the institutional arrangements/administrative mechanisms or procedures in place to align the implementation of the programmes/funds/instruments. The aim was to assess the level (high/medium/low) of the analysed coordination structures, as described in the following table.

Table 3. The three levels of collaboration and communication mechanisms

Level	Collaboration	Communication
High	There is a specific arrangement/organisation/ routine that also involves members managing (an)other programme(s)/fund(s)/instrument(s) with a description of the governance and decisional mechanisms.	There is a communication system involving members managing (an)other programme(s)/fund(s)/instrument(s), and its mechanism is described.
Medium	There is a specific arrangement/organisation/ routine that also involves members managing (an)other programme(s)/fund(s)/instrument(s) but without a description of the governance and decisional mechanisms.	There is a communication system involving members managing (an)other programme(s)/fund(s)/instrument(s), but its mechanism is not described.
Low	There is a specific arrangement/organisation/ routine, but members managing (an)other programme(s)/fund(s)/instrument(s) are not mentioned.	There is a communication system, but this does not involve members managing (an)other programme(s)/fund(s)/instrument(s).

Source: Consortium elaboration

The third activity in the documental analysis entailed the identification and classification (phased, concurrent, transfers, demarcation) of the synergies between two or more programmes/funds/instruments by screening the type of interventions described in the documents.

The **second phase** of the study included 71 interviews with MAs (see tables below for details). The information obtained from these interviews not only complemented the desk research but also provided valuable insight into the data collected to facilitate interpretation. Moreover, it helped identify good practices. The MAs for interviews were selected to ensure high representativeness at the geographical, programme, and institutional levels (national/regional). The outcome of the desk research also provided further insight for the selection of interviews. Specifically, the risk of policy overlap was checked to select: MAs managing programmes with a high policy overlap but without specific and structured coordination mechanisms or with no clear indication of the synergies at the intervention level; MAs managing programmes with a high policy overlap and with specific and structured coordination mechanisms, or with clear indication of the synergies at the

intervention level; MAs managing programmes with a low policy overlap, but with specific and structured coordination mechanisms.

Table 4. Number of interviews conducted by MS

	4 interviews each	3 interviews each	2 interviews each	1 interview each
Member States	BG, EL, PL, RO	DE, DK, ES, FR, HU ²³ , IE, NL, PT	AT, BE, CZ, CY, EL, FI, HR ²⁴ , LT, LV, SE, SI	EE, LU, MT, SK

Source: Consortium elaboration

An exception was Italy, as the study team interviewed representatives from 5 programme authorities.

Table 5. Number of interviews conducted by type of fund

ERDF	ESF+	CF	JTF	EMFAF	AMIF	ISF	BMVI
40	26	14	24	9	5	1	2

Note: 24 selected programmes are multi-fund

Source: Consortium elaboration

Table 6. Number of interviews conducted by institutional level

National programmes	Regional programmes
51 ⁽²⁵⁾	20

Source: Consortium elaboration

The second phase of the study also included three additional activities:

- The analysis of programme documents related to the Monitoring Committee composition of the programmes selected for interviews to understand better whether the authorities in charge of the EU funds and instruments, with which synergies are envisaged, are represented as members of the Monitoring Committees.
- The selection of 10 good practices out of the 54 selected programmes, i.e. programmes with specific and structured coordination mechanisms with other programmes/funds/instruments, and/or showcase interesting cases of synergies with other EU funds and instruments.
- A Focus Group consisting of a selected number of MAs (21) involved in the interviews to present key findings of the study and its results, thereby giving participants the opportunity to validate the findings and conclusions and add further elements to the debate.

²³ The study team also interviewed the Coordination body representatives; therefore the total number of interviews is 3.

²⁴ The study team conducted 2 interviews to further investigate 3 programmes, as the programme authorities for the Integrated territorial programme and the Competitiveness and cohesion were interviewed together.

²⁵ One interview was conducted with the Hungarian Coordination Body, and was additional to the ones planned with the programmes.

Study structure

The study has four chapters:

- **Chapter one** provides an overview of the policy overlap as reported in the programme documents.
- **Chapter two** illustrates the coordination mechanisms among CPR funds, EU funds and instruments, and the NRRPs by presenting the results of the documental analysis, integrated with the findings from the interviews.
- **Chapter three** describes the synergies using the same method as the previous chapter, i.e., the results of the documental analysis integrated with the findings from the interviews.
- **Chapter four** concludes the report with key policy recommendations.
- **Annexes** include tables and graphs elaborated to run the analysis:
 - **Annex A** includes the additional elements of the study methodology,
 - **Annex B** presents additional elements on the PA analysis,
 - **Annex C** presents additional elements on the NRRP analysis,
 - **Annex D** describes the survey data and additional information on the CPR funds,
 - **Annex E** presents the list of programmes identified for interviews and good practices.
 - **Annex F** includes the template of the semi-structured interviews for programme authorities.
 - **Annex G** presents the best practices.

1. Policy overlap

This chapter analyses the policy overlap, i.e. whether and how MSs plan to use CPR funds, EU funds and instruments, and programmes to support interventions in the twelve identified policy areas. The study defines policy overlap as the occurrence of interventions planned in the same policy areas and/ or for the same beneficiaries. However, this does not necessarily result in concrete coordination mechanisms and/or synergies during the implementation phase. These aspects will be further explored in Chapter 2 (on coordination) and Chapter 3 (on synergies and demarcation).

The policy overlap is comprehensively considered across twelve identified policy areas resulting from the cross-matching of the Specific Objectives (SO) (as defined by Art. 3 of ERDF Regulation, Art. 4 of ESF+ Regulation), the CPR policy objectives (Art. 5 of CPR) and the RRF Pillars Regulation (Art.3 of RRF Regulation 2021/241). More details are provided in Annex A1. The analysis is based on a comprehensive review of the different types of documents related to the PAs, the CPR programmes, and the EU funds and instruments documents (i.e. related regulations and work programmes).

1.1. Partnership Agreements and CPR programmes

A preliminary mapping of the main funds that MSs plan to use **in the PAs** to support investments in the five POs is provided in the table below ⁽²⁶⁾. This reveals a significant policy overlap between different CPR funds, particularly in the areas of green and digital transition, R&D&I, SME competitiveness, and climate change, despite each EU fund being aligned with its specific mission and objectives. Furthermore, there is a clear pattern in the allocation of funds for each PO, with EU funds and instruments showing a high degree of overlap among themselves and with CPR funds.

Table 7. Mapping of policy overlap between CPR funds and EU funds and instruments by PO in the PAs

PO	CPR funds	EU funds and instruments
PO1: A more competitive and smarter Europe	The ERDF appears to be the most common CPR fund proposed for interventions in R&D&I, digital connectivity and SME competitiveness. The EMFAF also intervenes significantly in SME competitiveness, as MSs plan to use it principally to support SMEs in the fisheries and aquaculture sectors.	HE, followed by the RRF, plays a key role in R&D&I. As for digital connectivity, the RRF and DEP are the most favoured instruments. SME competitiveness is primarily supported by the EAFRD and RRF.

⁽²⁶⁾ For more details on the number of MSs that envisage using CPR funds and EU funds and instruments to implement interventions in each policy area see Annex B.

PO2: Transitioning toward a greener and more resilient Europe	MSs envisage a significant allocation of the ERDF to support interventions in climate change and green transition. The use of the CF, JTF, and EMFAF to support these investments is also relevant. Indeed, the JTF is used in green transition projects, and the EMFAF in climate change and adaptation interventions.	Interventions in the green transition policy area are substantially supported by the RRF, followed by LIFE, EAFRD, and HE. Climate change and adaptation is predominantly supported by the EAFRD and LIFE, followed by the RRF.
PO3: A more connected Europe	The policy area dedicated to transport networks and mobility is primarily supported by the ERDF and CF across the EU.	MSs envisage using the CEF to support interventions in PO3 – transport networks and urban mobility. Almost 20 MSs also envisage using the RRF to support PO3-type investments under their NRRP.
PO4: A more social and inclusive Europe	The ESF+ is the leading CPR fund, followed by the ERDF, envisaged by MSs to support employment and the labour market, education, training and skills, and access to social services. In the case of employment and the labour market, MSs are also planning interventions through the JTF to support workers transitioning to greener sectors and acquiring new skills. The ERDF is significantly used for interventions related to access to the healthcare system through infrastructural investments. For the integration of third-country nationals, the ESF+ and AMIF, followed by the ERDF, are envisaged.	Interventions in employment and the labour market, education, training and skills, and access to social services appear to be supported primarily by the RRF. Regarding policies dedicated to education, training and skills, and youth and sport, ERASMUS+ plays a relevant role through its inclusion and diversity priority and framework of inclusion measures that aim to encompass participants with fewer opportunities, including migrants.
PO5: A Europe closer to citizens	Most MSs envisage using the ERDF, followed by EMFAF, to support actions to strengthen urban and local development.	MSs plan to primarily use the EAFRD to support local and urban development operations.

Source: Consortium elaboration based on EC documentation

Additional details are provided in the table below, which considers those CPR funds and EU funds and instruments used by at least one-third of the MSs (i.e. 9 of 27 MSs) to cover a specific policy area. This reveals evidence of policy overlap between the CPR funds and other EU funds and instruments across all policy areas. The policy overlap is higher concerning green transition and climate change and adaption, R&D&I, and digitalisation, followed by SMEs competitiveness, while it is lower in the integration of third-country nationals, access to social services and access to healthcare systems. This underscores the importance of addressing the so-called twin transition, namely digital transformation and green transition, which are central to Cohesion Policy objectives. More specific results from the mapping include:

- A recurrent overlap across most of the policy areas is seen between CPR funds and the RRF due to its broad financing scope (both for reforms ⁽²⁷⁾ and investments).
- The EAFRD, HE and LIFE often work in the same policy areas as the ERDF.
- The DEP is used in the digital connectivity policy area, while the CEF is primarily utilised to support investments in the trans-European networks.
- The InvestEU programme is mainly used in policy areas linked to PO1.

⁽²⁷⁾ The analysis of the reforms was out of the scope of this study.

- The CF primarily supports investments in the environment and trans-European networks in transport infrastructure (TEN-T).
- Although the deployment of the BMVI and ISF in the digital connectivity policy area is limited, both funds support interventions to improve the digitalisation of mechanisms to control borders, manage and monitor migratory flows, and combat human trafficking.
- Interventions in the same policy areas can also be detected between Cohesion Policy funds and the EMFAF, where the latter supports sector-specific interventions.
- EU4Health, TSI and the EGF do not appear across many policy areas and thus show less overlap than other funds.

Table 8. Policy overlap between CPR funds and EU funds and instruments identified in the PAs

Policy Objective	Policy Area	CPR Funds	EU Funds / Programmes
PO1	1.R&D&I	ERDF, ESF+, JTF, EMFAF	HE, RRF, EAFRD
	2.Digital connectivity	ERDF, ESF+, ISF	DEP, RRF
	3.SMEs competitiveness	ERDF, JTF, EMFAF	EAFRD, RRF
PO2	4.Green transition	ERDF, CF, JTF, EMFAF	LIFE, RRF, HE
	5.Climate change and adaptation	ERDF, CF, EMFAF	LIFE, RRF
PO3	6.Transport networks and urban mobility	ERDF, CF	CEF, RRF
PO4	7.Employment and the labour market	ESF+, ERDF, JTF	RRF
	8.Education, training and skills	ESF+, ERDF, JTF	Erasmus+, RRF
	9.Access to social services	ESF+, ERDF	RRF
	10.Access to healthcare	ERDF, ESF+	RRF
	11.Integration of third-country nationals	ESF+, AMIF	Erasmus+
PO5	12.Local and urban development (excl. Mob. and transport)	ERDF, ESF+, EMFAF	EAFRD

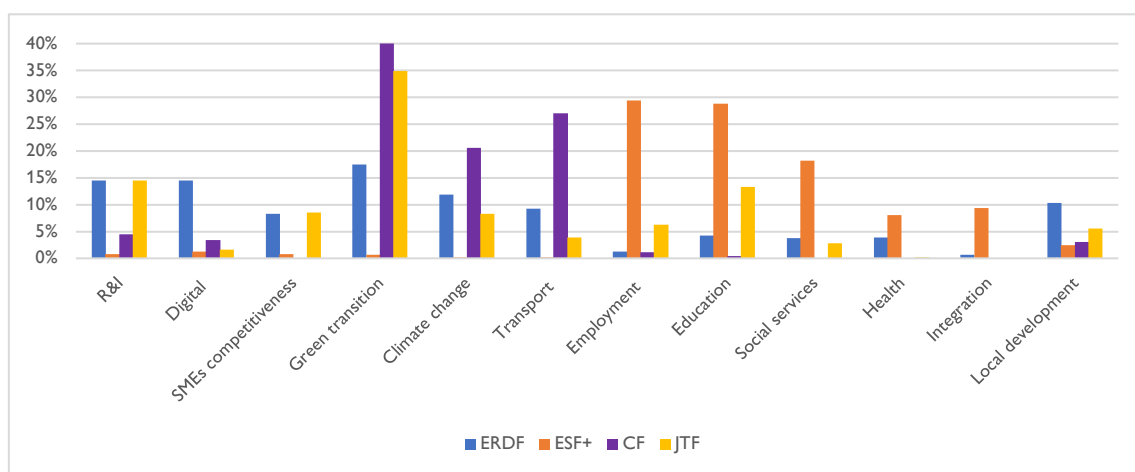
Source: Consortium elaboration

Some examples by MS (see tables in Annex B for additional details) include **Romania**, which invests most substantially across all policy areas (with the exception of the integration of third-country nationals and social services), employing a variety of CPR funds and EU funds and instruments. Additionally, the **Slovakian** PA considers diversified investments across all policy areas utilising a variety of funds, showing the highest mix of funds for R&D&I. Poland, Italy, and Hungary exhibit significantly varied interventions in terms of policy area coverage and funds used. **Poland** focuses more on the green sector, urban development and transport; **Hungary** on interventions dedicated to climate change, as well as digital connectivity and the transport sector; **Italy** mainly on PO2 policy areas, as well as on digital connectivity and social services. Of note are the variety of funds mentioned in the **Cypriot** PA for R&D&I, the **Danish** PA for SME competitiveness, and the **Portuguese** PA for climate change.

The next step in the analysis of the policy overlap considers **all the programmes (PRs)** drafted by the national and regional MAs of the 27 MSs and approved by the EC (see Annex D for details).

In terms of **policy area mapping**, the figure below illustrates the distribution of interventions (number of actions) ⁽²⁸⁾ of the ERDF, ESF+, CF and JTF funds by policy area. Overall, the results of the analysis confirm the allocation of funds within CPR POs and align with the thematic concentration requirements. PRs financed by the ERDF cover, at least marginally, all policy areas, while other funds, such as the CF and ESF+, are more concentrated within a few select policy areas. These findings align with the intervention and beneficiary requirements of the funds.

Figure 3. Distribution of the Cohesion Policy funds (number of interventions) by policy area



Source: Consortium elaboration based on survey data (all samples)

More in detail:

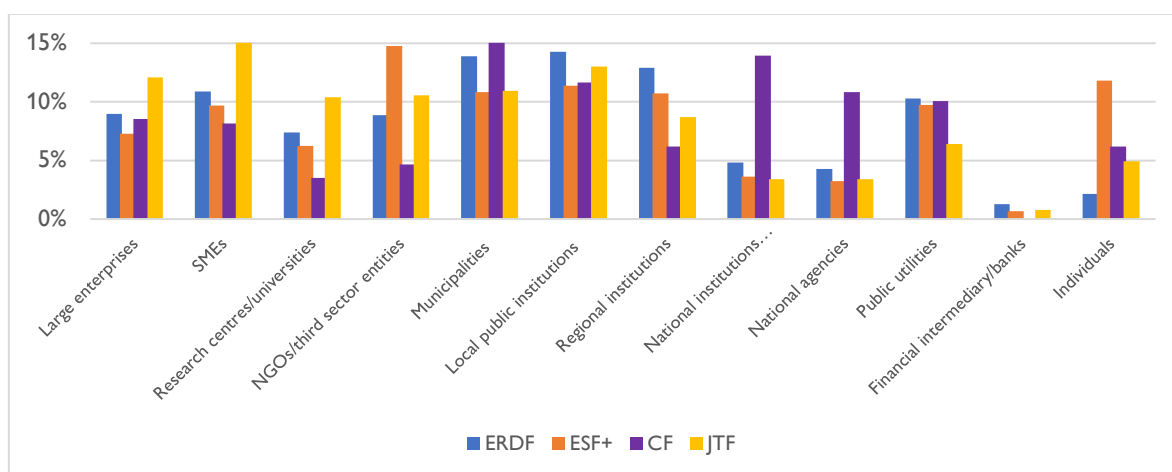
- **Green transition** emerges as the policy area with the highest intervention concentrations across most PRs, except for the ESF+. Specifically for the CF, JTF, and ERDF PRs, 40%, 35% and 18% of the interventions, respectively, are concentrated in this policy area according to the document analysis. A similar trend, albeit to a lesser extent, is observed for the climate change and adaptation policy area with shares of 21%, 8%, and 12% respectively.
- **R&D&I** is the second most supported policy area under ERDF and JTF programmes, with an intervention share concentration of 14% for both funds.
- **Digital connectivity**, with a 14% intervention share, is almost exclusively supported by ERDF.
- **SME competitiveness** is predominantly financed by JTF and ERDF with respective fund concentrations of 9% and 8%.
- **Transport networks and urban mobility** are primarily covered by the CF (27% of fund interventions), which represents the second most significant policy area for the CF after green transition.

⁽²⁸⁾ Taking all programmes into account, the percentage is defined as the share of interventions in each policy area financed by each fund, considering all beneficiaries. A fund is considered to support an intervention within a specific policy area if the programme outlines at least one action for one beneficiary in said area. Therefore, the figure presents a summary representation of those areas that receive the highest number of interventions in that policy area.

- **Employment and the labour market, education, training and skills, access to social services, access to healthcare systems, and the integration of third-country nationals** are mainly covered by the ESF+. Although these policy areas are also of interest to the ERDF and JTF, the former focuses primarily on their structural aspects, while the latter only operates in specific EU regions.
- Lastly, **local and urban development** is moderately covered by all Cohesion Policy funds, with ERDF and JTF funds concentrating 10% and 6% of their interventions in this policy area, respectively.

Looking at the beneficiaries identified by each fund (figure below), expressed as a distribution percentage ⁽²⁹⁾, municipalities, local public institutions, and regional institutions are predominant, particularly for interventions financed by the ERDF and ESF+. Some noteworthy observations include individuals and NGOs/third-sector entities financed by the ESF+ (12% and 15%, respectively). The JTF has a preponderance of enterprises, both large and SMEs, as beneficiaries (27%). Most interventions under the CF have municipalities and national institutions/ministries as beneficiaries, with these accounting for 16% and 14%, respectively. The category covering financial intermediaries/banks appears to be less prioritised, possibly explained by the fact that most interventions within the programmes financed through Cohesion Policy funds are implemented through grants rather than financial instruments.

Figure 4. Distribution of the Cohesion Policy funds (number of interventions) by beneficiary



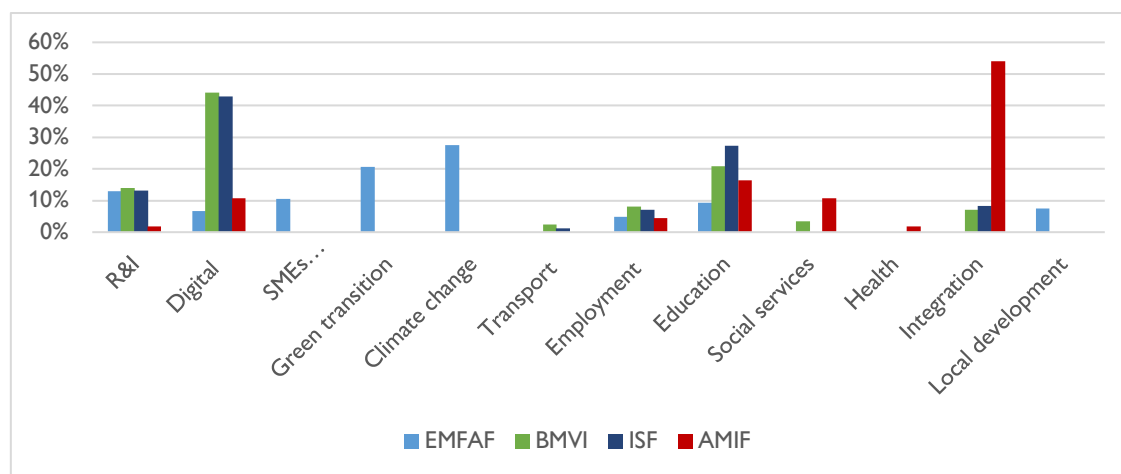
Source: Consortium elaboration based on survey data (all samples)

Looking at the remaining funds (figure below), the EMFAF is distributed across a wide variety of policy areas (8 out of 12), with a predominance of interventions in green transition and climate change. This variety is reflected in the policy overlap observed for the fund, especially with ERDF and JTF interventions. The situation is different for the HOME funds, which are concentrated in fewer policy areas. R&D&I, along with education, training, and skills, are the most important policy areas for the BMVI, accounting for 21% and 44%, respectively. 43% of the ISF interventions are dedicated to digital connectivity, and 27% to education, training and skills. Both funds, therefore, provide financial support for interventions aimed at enhancing the reliability of IT systems and strengthening the capacity of public authorities to utilise them effectively. The AMIF interventions focus mainly on the integration of third-country nationals (54%), followed by education, training, and skills (16%) and access to social services (11%). In terms of beneficiaries, most actions funded by the HOME funds and the EMFAF target public authorities at both national and local levels. The

⁽²⁹⁾ As for the previous figure. The distribution is based on the documental analysis and the mapping of which beneficiaries are cited for the interventions within each policy area.

AMIF encompasses not only public authorities and utilities but also individuals and the third sector.

Figure 5. Percentage distribution of the number of interventions of the HOME funds and EMFAF by policy area



Source: Consortium elaboration based on survey data (all sample)

The final step in **the analysis examines the extent to which policy overlap exists between the CPR funds**. The table below illustrates the degree of policy overlap between the CPR funds on a scale varying from low (lighter blue) to very high (darker blue)⁽³⁰⁾. Accordingly, the ERDF has the most policy overlap with other funds, particularly with the CF, ESF+, JTF, and EMFAF. Overlap is also concentrated between the CF, JTF and EMFAF, as well as between the latter two funds. A high level of policy overlap is also found between the ESF+, JTF and EMFAF. The HOME funds show a high level of overlap with the ERDF (BMVI and ISF) and the ESF+ (AMIF) and with each other (BMVI-AMIF and BMVI-ISF). At the MS level (see Annex D for details), the overlap is more frequent in MSs with fewer programmes, drafted predominantly at the national level.

Table 9. Policy overlap between CPR funds

Overlap with	ERDF	CF	ESF+	JTF	EMFAF	AMIF	BMVI	ISF
ERDF								
CF								
ESF+								
JTF								
EMFAF								
AMIF								
BMVI								
ISF								

Source: Consortium elaboration based on survey data (all sample)

Note: blue navy = very high level of policy overlap between the funds, blue = high level of policy overlap, light blue = low level of policy overlap and pale blue = very low degree of policy overlap

⁽³⁰⁾ Calculated in quartiles on the basis of the EU minimum and maximum values. These EU values are calculated as the MS average number of policy areas and beneficiaries in common across all the programmes financed by each fund within each MS. The averages for CF and JTF only consider those Member State in which they operate.

1.2. Work programmes and strategic documents

This section considers the policy overlap that emerged from the analysis of key documentation on EU funds and instruments ⁽³¹⁾, such as work programmes (WPs) and regulations. The resulting mapping of the policy areas covered by each selected EU fund and instrument (the TSI, EAFRD, HE, CEF, DEP, InvestEU Fund, LIFE, EU4Health Programme, EGF, and Erasmus+, see Annex A2 for further detail) is presented in the following table.

Table 10. Overlap between CPR Funds policy areas and EU funds and instruments

PO	Policy Areas	TSI	EAFRD	HE	CEF	DEP	InvestEU	LIFE	EU4Health	EGF	Erasmus+
1	1. R&D&I										
	2. Digital connectivity										
	3. SMEs competitiveness										
2	4. Green transition										
	5. Climate change and adaptation										
3	6. Transport networks and urban mobility										
4	7. Employment and labour market										
	8. Education, training and skills										
	9. Access to social services										
	10. Access to the health care system										
	11. Integration of third-country nationals										
5	12. Local and urban development										

Source: Consortium elaboration

In **PO1**, the TSI and HE emerge as the programmes with the highest degree of overlap, followed by the InvestEU programme, DEP, EU4Health Programme, CEF, and EAFRD. Given that the ERDF is the most relevant CPR fund in relation to PO1, potential overlaps may occur with EU funds and instruments covering the same policy areas. For instance, the TSI emphasises several themes related to the ERDF and PO1, such as improving the business environment for SMEs, promoting sustainable sectoral development, and supporting research, innovation, and digitisation. Specifically, the TSI addresses digital transition by providing support for e-government solutions, e-procurement, connectivity, data access and governance, data protection solutions, e-learning, and the application of artificial intelligence-based solutions. Moreover, the TSI supports policies related to access to finance and lending for the real economy, with particular focus on SMEs. Interactions between HE and the ERDF are extensive and encompass all HE's WPs, which concentrate on R&D&I. While some WPs adopt a cross-sectoral approach, others take a thematic approach. For instance, Pillar II, the Digital, Industry and Space WP, is concerned with fostering competitiveness and the sustainable development of SMEs across different economic areas, including the development of digital tools for SMEs and the advancement of sustainable economic growth.

⁽³¹⁾ Their establishing regulations and work plans have been screened. In some cases, guidance for applicants, implementation reports, and ad-hoc guidance have also been considered. This approach enabled the study team to gain a comprehensive understanding of the policy areas covered, the mechanisms in place for collaboration and communication, and the potential for synergies with Cohesion policy fund interventions. The methodology used for the policy mapping is the same as that used in the PAs analysis to cross-match the POs defined by the ERDF Regulation, ESF+ Regulation, CPR policy objectives, and RRF Pillars Regulation to identify 12 policy areas directly connected to the five POs of Cohesion Policy (additional details provided in Annex A3).

In **PO2**, the TSI, EAFRD, HE, InvestEU and LIFE show the greatest degree of overlap, followed by the CEF. Since the JTF, CF, and ERDF emerge as the most relevant CPR funds for this PO, there are potential overlaps with the EU funds and instruments covering the same policy areas. For instance, LIFE aims to mitigate the impact of climate change through its focus on enhancing nature and biodiversity, halting and reversing the loss of wildlife habitats, promoting a circular economy, supporting climate change mitigation and adaptation, and facilitating the transition to clean energy. Moreover, it also focuses on transitioning towards a sustainable, circular, energy-efficient, renewable energy-based, climate-neutral, and resilient economy, which aligns with the objectives of the JTF. Specifically, LIFE's WP 'Climate Change Mitigation and Adaptation' contributes to these objectives by funding projects that promote climate action and contribute to a just transition. The EAFRD, on the other hand, offers funding opportunities for operations related to the green transition and climate change through various channels, such as grants or financial instruments. MSs determine their preferred method of implementation based on their EAFRD Strategic Plans. These operations may include the adoption of environmentally friendly practices, such as agroforestry, precision agriculture, or the use of renewable energy sources in farming. Furthermore, the EAFRD supports the restoration and preservation of ecosystems and biodiversity in rural areas, contributing to climate change mitigation and adaptation.

The TSI, EAFRD, HE, CEF, DEP, and InvestEU emerge as the main funds and programmes for **PO3**, whereas the ERDF and CF emerge as the most relevant CPR funds. For instance, the ERDF, CEF, and CF all play a significant role in policy areas related to transport and digital connectivity. The CEF specifically supports the development and completion of projects in less developed parts of the network, particularly in MSs eligible for financing from the CF. Common areas of focus across all three funds include cross-border links, addressing missing links, and ensuring a balance between rural and urban developments. Moreover, potential overlaps can be detected in InvestEU intervention priorities. InvestEU prioritises sustainable and green investment projects in areas such as railways, waterways, and alternative fuel infrastructure for all modes of transport. It also focuses on the renewal and retrofitting of mobile transport assets, sustainable and smart urban mobility, and the development of TEN-T infrastructure. In addition, InvestEU supports sustainable and safe transport infrastructure and mobility solutions, promoting projects that enhance environmental protection, water and waste management, renewable energy, and sustainable transport.

In **PO4**, the TSI exhibits the greatest degree of overlap with the policy areas in its domain, while the EAFRD, DEP, and InvestEU Fund exhibit slightly lower degrees of overlap. Additionally, there is some overlap between Erasmus+, EU4Health, EGF, and the HE programmes. The ESF+ is the most relevant CPR fund in relation to PO4 and thus has potential overlap with the EU funds and instruments covering the same policy areas. For instance, HE supports policy areas related to education and training through various WPs, such as WP2 on Marie Skłodowska-Curie Actions and WP5 on culture, creativity and inclusive society. In addition, HE covers themes related to healthcare access in WP4 and addresses the labour market and the integration of third country nationals in WP5. ESF+ and EU4HEALTH, on the other hand, both focus on healthcare. The ESF+ supports improving access to healthcare for vulnerable groups such as the elderly, persons with disabilities, and asylum seekers and refugees. It also supports the development of healthcare professionals' skills, including digital competencies, to ensure the provision of high-quality, patient-centred care. Erasmus+ and the ESF+ have a strong overlap, as they both contribute to the EU's employment, social, education, youth and skills policies. Erasmus+ places particular emphasis on policy areas related to education and skills in line with PO4. Furthermore, Erasmus+ and the ESF+ share target groups, particularly individuals, using grants as the main policy instrument. Common target groups between Erasmus+ and the ESF+ include students, pupils, trainees, VET learners and apprentices, adult learners, teachers, trainers, young people within or outside education and young

workers. Both programmes aim to enhance access to quality education and training and improve skills and competencies relevant to the labour market. The ERDF also shares common target groups (SMEs, Universities, NGOs, Local, regional or national institutions) with Erasmus+, adding another area of complementarity between these programmes.

In **PO5**, only the TSI, EAFRD and InvestEU exhibit any overlap in the policy area regarding local and urban development. The ERDF is the most relevant CPR Fund for this PO, so there is potential overlap with those EU funds and instruments covering this policy area. For instance, the TSI provides support for transport and mobility in urban areas as well as for sustainable development in rural, remote, and insular areas. Additionally, under the EAFRD, the LEADER programme is designed to support Local Action Groups (LAGs) that bring local stakeholders together to develop and implement strategies for rural development. LEADER aims to create economic opportunities in rural areas and improve the quality of life for rural communities by addressing issues such as social exclusion, poverty, and demographic decline.

1.3. National Resilience and Recovery Plans

The policy overlap examined in this section explores the policy areas in which NRRPs plan to invest.

From the financial perspective, the NRRP budget allocation across the six pillars confirms the requirements outlined in the EU Regulation. Key findings indicate that green transition (corresponding to PO2 and PO3 of the Cohesion Policy) is the most supported pillar across all MSs, exceeding 40% (and therefore the regulatory requirement of 37%) in almost all the NRRP plans. The exceptions are Greece (38.1%), Spain (39.9%), Hungary (39.2%), Italy (39%) and Lithuania (37.3%). Regarding pillar 2, dedicated to digital transformation, Germany is an outlier, allocating 48.1% of its NRRP to investments and reforms to this pillar. The budget allocations of the other MS align with the EU Regulation requirements, setting the minimum at 20% for budget allocation for this sector.

The document analysis ⁽³²⁾ provides an overview of the investments outlined in the NRRPs for each Cohesion Policy PO ⁽³³⁾. Specifically, it considers whether the NRRPs propose interventions in policy areas aligned with the POs and involving the same beneficiaries ⁽³⁴⁾ as the Cohesion Policy funds.

In **PO1**, the interventions are similarly distributed across the various types of beneficiaries, with national institutions, national agencies, and public utilities being the most targeted. These are followed by regional institutions and development agencies, research centres, universities, large enterprises and SMEs. Slovakia and France, followed by Spain, Austria, and Cyprus, identified the highest numbers of beneficiary types in their respective NRRPs. Overall, the beneficiaries receiving NRRP resources for R&D&I, SME competitiveness and digital transformation may also be involved in implementing Cohesion Policy funds. The NRRPs, therefore, present a high policy overlap with policy areas covered within PO1.

⁽³²⁾ The documental analysis takes into account the first version of the NRRP.

⁽³³⁾ The figures from B.1. to B.5 in Annex B represent a synthesis of the interventions planned in the policy areas included in each PO, in terms of the beneficiaries identified to receive financial resources, and the forms of support identified to carry out the interventions.

⁽³⁴⁾ It is important to note that in the context of this study, the term 'beneficiary' acquires a different meaning to its usual connotation in the context of Cohesion policy funds or NRRPs. In the context of Cohesion policy funds beneficiaries are considered as legal or natural persons receiving financial support (in the form of grants and/or financial instruments) to implement the selected operations, while in the context of NRRPs, the term 'beneficiaries' refers to the recipients of financial resources who are responsible for initiating or both initiating and implementing the operations outlined in the NRRPs.

In **PO2**, national institutions, namely ministries and national agencies, rank as the primary beneficiaries of RRF resources, followed by local public institutions and public utilities. These beneficiaries may also receive Cohesion Policy funds, suggesting potential policy overlap. In terms of the number of beneficiaries identified, Cyprus and Italy plan to distribute financial resources to a larger pool of beneficiaries at local, regional and national levels. However, some MSs have planned interventions PO2 targeting a limited number of beneficiaries. For instance, the Czech NRRP has designated national institutions as the sole beneficiaries of the RRF, while in the case of Greece, the primary beneficiaries are municipalities, and in Sweden, they are national institutions and local public authorities.

In **PO3**, the interventions proposed to support transport networks and urban mobility⁽³⁵⁾, thus supporting green and more digitalised transport infrastructures, primarily involve national institutions, such as ministries, followed by public utilities, national agencies and regional actors across most MSs. However, some MSs, such as France and Denmark, envision a broader range of beneficiaries. In the case of France, municipalities, larger companies and SMEs, and local and regional institutions have been identified as beneficiaries, while the Danish NRRP has individuated research centres and universities to govern the RRF resources. Several NRRPs, including Austria, Greece, Ireland, Lithuania, Latvia, Luxembourg, and Malta, have limited interventions in this area. Overall, interventions supporting transport infrastructure and urban mobility primarily involve national institutions, which may also be involved in Cohesion policy funds.

National institutions and agencies, along with public utilities, are responsible for managing interventions in **PO4**⁽³⁶⁾. Public utilities, including schools, public educational centres, employment agencies, kindergartens, public hospitals, hospices, and migrant integration centres, are frequently mentioned as beneficiaries of RRF funds for these interventions. Regional actors, such as regions and regional development agencies, are also eligible to receive funding for these interventions. It is worth noting that NGOs and third-sector entities are identified as beneficiaries in 13 of the 27 MSs mainly due to their pivotal role in certain interventions. However, this is the only area in which they qualify as beneficiaries in many MSs. Some MSs, such as France, have identified a significant number of beneficiaries. In the Czech Republic, Spain, Italy, the Netherlands and Slovakia, financial intermediaries and individuals are not entitled to receive funding directly, while the Polish NRRP has designated financial intermediaries as RRF beneficiaries. Overall, the beneficiaries identified in the NRRPs for PO4 may also be eligible as the beneficiaries and implementing entities of Cohesion policy funds, suggesting potential policy overlap.

In **PO5**⁽³⁷⁾, interventions aimed at supporting local and urban development, integrated territorial strategies and sustainable development have been incorporated into most of the NRRPs. National institutions, followed by municipalities, are expected to play a key role. However, some MSs, such as Spain and Austria, intend to expand the range of RRF fund beneficiaries for PO5 by also including large companies and SMEs. Overall, the

⁽³⁵⁾ NRRP interventions within PO3 correspond to the RRF pillar green transition, and partially to pillar 2 dedicated to digital transformation, for what concerns the digitalisation of the mobility networks. The Cohesion policy funds and NRRPs share the common goals of supporting and promoting sustainable multimodal urban mobility, developing climate resilient, intelligent, secure, sustainable and intermodal green transition, and developing and enhancing sustainable, climate resilient, intelligent and intermodal national, regional and local mobility. The Cohesion policy funds specifically allocate resources for these investments under PO3, while the NRRPs address these objectives through operations planned within the green transition and digital transformation pillars.

⁽³⁶⁾ It focusses on investments related to employment and the labour market, education, training and skills, access to social services and healthcare systems, as well as the integration of third-country nationals. These types of investments are also planned across three RRF pillars, namely social and territorial cohesion; policies for the next generation, children and youth; and health, economic, social and institutional resilience.

⁽³⁷⁾ Types of intervention corresponding to PO5 in the context of Cohesion policy are included in the RRF pillar for Social and territorial cohesion. The investments in this policy area include operations to foster integrated and inclusive social, economic and environmental development, as well as culture, natural heritage, sustainable tourism, and security in both urban and non-urban areas.

beneficiaries of RRF interventions potentially overlap with those involved in implementing interventions designed in Cohesion policy programmes.

To sum up, the primary beneficiaries of RRF interventions are local and national institutions, which can also be beneficiaries of Cohesion Policy funds. **Across the five POs, the NRRPs exhibit a high degree of policy overlap with policy areas covered by the Cohesion Policy funds.** However, the fact that NRRPs have identified beneficiaries that may also be involved in Cohesion Policy fund management does not necessarily pose a risk of displacement and double funding if coordination mechanisms between different agencies, ministries and departments are established. Moreover, the management of these funds depends primarily on the institutional and administrative setup of the specific country. The cases of Estonia, Ireland and Lithuania, for instance, are representative, as these MSs are highly centralised, and as such, both Cohesion Policy funds and NRRPs are centrally managed and implemented, thus potentially limiting the risk of double funding.

2. Coordination mechanisms

As detailed in the methodology section, this study defines '**coordination**' as the interaction of interventions at the strategic/programme level, while 'synergy' refers to integration at the operational level, i.e., at the single project level. This chapter analyses coordination in terms of cooperation (the tools and arrangements that enable working together) and communication (the methods through which information is transferred).

The coordination analysis was performed through a comprehensive document analysis involving a review of all EU CPR Programmes, NRRPs, and EU instruments/programs that are directly/indirectly managed, including the EAFRD. The findings obtained through this desk analysis formed the basis for conducting field interviews with programme authorities, culminating in a focus group to discuss the main findings directly (see the methodological annexe for more details).

The first three sections specifically analyse cooperation among CPR funds (2.1), between CPR funds and other EU funds and instruments (2.2), and between CPR funds and the RRF (2.3). Section 2.4 focuses on the role of Monitoring Committees as a means to enhance coordination. To conclude, Section 2.5 draws conclusions on specific aspects of coordination.

2.1. Coordination among CPR Funds



This section addresses coordination among CPR funds. More specifically, the first subsection investigates the intensity of coordination, identifying which funds collaborate more frequently with other CPR funds. The second subsection delves deeper into the mechanisms of coordination to understand how communication and actual collaboration occur.

2.1.1. The intensity of coordination among CPR funds

The documental analysis at **the PA level** indicates that most of the MSs (16 of 27) provide a detailed description of the mechanisms and modalities proposed by the programme authorities to ensure effective collaboration and communication among CPR funds (i.e. a high level of coordination). In these cases, the PAs detail the institutional setup created to ensure governance and a smooth flow of information between local, regional and national actors managing CPR funds. Conversely, some PR documents, containing minimal or no information regarding coordination with other funds/programmes, simply reference the PAs. This is the case for both smaller MSs with centralised management of the funds, such as Malta, and larger MSs with multiple regional and national programmes, such as France and Spain. The PAs of Bulgaria, Cyprus, Czech Republic, Greece and Sweden lack any description of coordination mechanisms altogether.

The document analysis **at the PR level** provides detailed information on the coordination mechanisms (see table below).

Table 11. High/medium collaboration and communication between funds at the national programme level

Collaboration with 	National ERDF	National ESF+	National CF	National JTF	EMFAF	AMIF	BMVI	ISF
ERDF	5%	15%	3%	3%	8%	3%	3%	3%
ESF+	13%	11%	4%	13%	4%	13%	2%	4%
CF	13%	13%		9%	13%	4%	4%	4%
JTF	23%	32%	14%	9%	14%	14%	9%	14%
EMFAF	28%	16%	12%	12%		-	-	-
AMIF	27%	46%	4%	4%	-		38%	38%
BMVI	15%	19%	4%	4%	-	54%		54%
ISF	12%	12%	8%	4%	-	54%	46%	
Communication with 	National ERDF	National ESF+	National CF	National JTF	EMFAF	AMIF	BMVI	ISF
ERDF	15%	11%	7%	7%	7%	5%	5%	5%
ESF+	5%	11%	2%	2%	4%	7%	5%	5%
CF	13%	13%		13%	4%	4%	4%	4%
JTF	23%	27%	9%	9%	14%	14%	9%	14%
EMFAF	16%	12%	12%	12%		-	4%	-
AMIF	19%	27%	4%	4%	4%		19%	27%
BMVI	19%	15%	4%	4%	8%	31%		46%
ISF	4%	4%	4%	4%	0%	35%	35%	

Source: Consortium elaboration based on survey data (sample: 265)

Note: The percentages represent the share of programmes with medium or high levels of collaboration and communication mechanisms over the total number of programmes financed by the CPR funds. The empty cells denote that no coordination mechanisms were found in the programme documents, while the cells in grey represent funds that finance a single programme within the MS and, therefore, have no need to establish collaboration and communication mechanisms with other MAs.

At the **national programme level**, an evident finding is that a higher level of collaboration mechanisms is generally associated with higher levels of communication.

By fund, coordination between national programmes is most prominent for funds like the AMIF-ESF+ and among the HOME funds, where most MSs have incorporated these programmes under a single national MA, as seen in the case of Romania (see box below). Programmes coordinated by the same MA naturally share internal mechanisms for management, monitoring and control. Specifically, 19 MSs share the same MA for the AMIF, BMVI and ISF programmes, while 6 MSs select different MAs for these programmes. Among the 6 MS with different MAs, in 5 cases, the BMVI and ISF programmes have the same MA, while the AMIF programmes have a different one. In Germany, the BMVI, ISF and AMIF programmes each have a different MA. Finally, Denmark only counts the BMVI programme, while Ireland only has the AMIF and ISF programmes, managed by two separate MAs. The high level of coordination between the HOME funds was confirmed by the interviews, which indicated it was common, especially in migration management and security.

The JTF demonstrates robust coordination with the ERDF, which is facilitated by their shared programming framework. However, the JTF also establishes links with the ESF+, driven by the need to complement decarbonisation investments with initiatives focused on human resources development.

There are also various coordination patterns between the ESF+ and ERDF. The ERDF interview respondents often identified the ESF+ as their primary coordination partner and vice versa. This natural alignment is primarily due to the implementation of both funds within multi-fund programmes, where shared management modalities foster inherent coordination. The ERDF and ESF+ also serve as important 'bridges' between other funds within the CPR framework, such as the CF and EMFAF.

Box 1. Example of 'high' coordination mechanisms in Romania

In **Romania**, the HOME funds (AMIF, ISF, and BMVI) are managed by a shared MA, the Internal Affairs Management Authority (AMAI), which implements a unified management and control system. This system involves the same authorities as previous financial frameworks. The programme document highlights that, since the previous programming period AMAI worked in close cooperation with the public authorities responsible for the national programmes, with civil society and international organisations in the field of asylum and migration. A joint MC for the ISF, AMIF and BMVI will be established, comprising representatives from intermediate authorities and bodies, the Ministry of Investments and European Projects, a higher education institution and a non-governmental/international organisation with relevant expertise in fundamental rights. Moreover, AMAI will ensure easy access to relevant information, provide sufficient time to present proposals, maintain channels for questions and the dissemination of consultation results, and support the institutional capacity building of partners to help them actively participate in programme preparation, implementation, monitoring and evaluation.

Source: Consortium elaboration on the basis of funds' programmes

At the **regional programme level**³⁸ (see table below), a significant level of collaboration is observed between the regional ERDF programmes and the regional ESF+ programmes, as well as between the JTF and the regional ESF+ programmes. Additionally, there is a notable level of collaboration between the JTF and regional programmes within the same fund, denoting collaboration in implementing the JTF across regions. However, communication mechanisms at the regional level are less defined than collaboration mechanisms, with the exception of the communication mechanism between the JTF authorities and those of the regional ESF+ programmes.

Table 12. High/medium collaboration and communication mechanisms between funds at national and regional programme levels (Cohesion Policy funds)

Collaboration with	National ERDF	National ESF+	National CF	National JTF	Regional ERDF	Regional ESF+	Regional JTF
Regional ERDF	8%	10%	2%	5%		33%	5%
Regional ESF+	4%	6%	-	2%	-		4%
Regional JTF	13%	9%	4%	4%	-	35%	22%
Communication with	National ERDF	National ESF+	National CF	National JTF	Regional ERDF	Regional ESF+	Regional JTF
Regional ERDF	6%	9%	2%	3%		14%	3%
Regional ESF+	3%	8%	2%	4%	-		3%
Regional JTF	13%	17%	-	4%	-	22%	4%

Source: Consortium elaboration based on survey data (sample 270)

Note: The percentages represent the share of programmes with medium or high levels of collaboration and communication mechanisms over the total number of programmes financed by the CPR funds. The empty cells denote that no coordination mechanisms were found in the programme documents, while the cells in grey represent funds that finance a single programme within the MS and therefore have no need to establish collaboration and communication mechanisms with other MAs.

Table 13. High/medium collaboration and communication mechanisms between funds at national and regional programme levels (HOME funds and EMFAF)

Collaboration with	EMFAF	AMIF	BMVI	ISF
Regional ERDF	6%	1%	-	-
Regional ESF+	3%	4%	-	-
Regional JTF	4%	-	-	-
Communication with	EMFAF	AMIF	BMVI	ISF
Regional ERDF	7%	4%	5%	4%
Regional ESF+	8%	4%	2%	1%
Regional JTF	13%	9%	4%	4%

Source: Consortium elaboration based on survey data (sample 270)

³⁸ At the regional level, the funds implemented are the ERDF, ESF+, and JTF.

Note: The percentages represent the share of programmes with medium or high levels of collaboration and communication mechanisms over the total number of programmes financed by the CPR funds. The empty cells denote that no coordination mechanisms were found in the programme documents, while the cells in grey represent funds that finance a single programme within the MS and therefore have no need to establish collaboration and communication mechanisms with other MAs.

2.1.2. The mechanisms of coordination

Overall, as per the interviews, **the design of the PA** itself plays a pivotal role as a framework within which coordination between various funds can be identified and developed, especially during the early stages of programme design. Moreover, the PA establishes demarcation lines that delineate where and how different programmes can operate, thereby preventing the duplication of efforts. The interviewees often highlighted the importance of the PAs in simultaneously ensuring:

- A **top-down perspective**, when national coordination authorities issue instructions and align with EU directives to enhance programme implementation, ensuring that funding from different sources is utilised effectively and without duplication.
- A **bottom-up consultation process** across various administrative levels, aiding the decision-making process regarding what will be financed and through which resources.

Furthermore, PAs lay the foundation for creating coordination modalities during the implementation phase. The box below offers examples of these coordination modalities. In some Member States, coordination is "thematic," based on specific policy areas. In Member States with both national and regional programmes, coordination involves multi-level governance mechanisms. The PAs also detail the various actors involved, such as national ministries, national agencies, regional authorities, provincial actors, and social and economic partners, outlining their roles in the process.

Notably, in the majority of cases, these mechanisms are inherited from the 2014-2020 programming period, representing a legacy in terms of institutional governance and ensuring the continuity of the institutional framework. The interviews confirmed that this continuity facilitates enhanced cooperation, improving both collaboration and communication.

Box 2. Examples of 'high' coordination mechanisms in the PAs

Modalities of collaboration	Description
Working committees per policy area	<p>In the case of the PA of Spain, the strategic document provides a comprehensive overview of the organisations and institutions responsible for ensuring coordinated and structured collaboration for the implementation of interventions in PO1, as well as in PO4. There are several examples:</p> <ul style="list-style-type: none"> - In SO 1.1, coordination between national and regional actors is ensured through the Council for Scientific, Technological and Innovation Policy (CPCTI), the EECTI Monitoring Committee, and the RDI Policy Network; - In SO 1.2, agreements between the national government and autonomous regions will ensure coordination between the different levels of government running interventions for the digitalisation of the public administration; - In PO4, the Administrative Unit of the European Social Fund (UAFSE) of the Ministry of Labour and Social Economy will act as the sole managing authority for all 19 regional and four national programmes and also coordinate the entire programming and evaluation process

<p>Working committees and inter-institutional committees as a reflection of the multi-level governance</p>	<p>The PA of Italy specifies that the coordination of CPR funds will be ensured through the PA Committee ('Comitato AP') of the CPR Funds, established for the 2014-2020 programming period. The committee is chaired by the central authorities responsible for coordinating the ESF+ and ERDF funds, specifically the Department for Cohesion Policies of the Presidency of the Council of Ministers, the Ministry of Labour, and the National Cohesion Agency. The Committee includes, among others, the regional and national programmes, the central administrations accountable for horizontal principles, the national authorities tasked with fulfilling the enabling conditions, and representatives from institutional and socio-economic partnerships, as well as civil society entities. Within the PA framework, working groups and subcommittees plan to meet twice a year and focus on specific policy areas. They are in charge of ensuring the coordination and complementarity at level of single interventions among funds.</p> <p>The PA in Germany outlines the coordination mechanisms envisaged at both the central government and Lander levels. At the central level, the authority in charge of ensuring coordination is the Federal Ministry for Economic Affairs and Climate Protection, in collaboration with the Ministry of Labor and Social Affairs for the ESF+, the Federal Ministry of Food and Agriculture for the EMFAF, and the Federal Ministry of the Interior for the HOME funds, and the Landers. Fund-specific meetings and topic-specific meetings with representatives of the central government and Landers are planned, along with mutual representation in the MC. Furthermore, the PA describes the role of the Inter-ministerial working group, responsible for coordinating all national and regional programmes to achieve a high degree of coherence between the individual measures, and to facilitate the sharing of experiences.</p>
--	--

Source: Consortium elaboration

At the PR level, the analysis of coordination among CPR Programme Authorities reveals two significant aspects. Firstly, being part of the same organization facilitates coordination notably. Indeed, when MAs of different funds belong to the same ministry, such as the Ministry of Regional Development and the Ministry of Economy and Finance, they demonstrate a higher level of collaboration and communication. This is not surprising, as they share the same organizational structure, which simplifies not only the sharing of financial and administrative data and procedures but also common strategic decision-making.

Secondly, coordination mechanisms differ when comparing Cohesion Policy funds and HOME funds. Besides differing focus, another factor contributing to the lesser extent of coordination is the varying administrative cultures. Cohesion Programmes are managed by ministries linked to social and economic development issues, such as the Ministry of Finance, Economy, or Regional Development. On the other hand, HOME funds are managed by ministries responsible for interior affairs, which sometimes have more recent experience managing CPR programmes. However, since HOME funds have been included in the CPR, collaboration has strengthened among both national and regional authorities managing Cohesion Policy funds and the national authorities managing HOME funds.

Besides the interactions among programme authorities, coordination during the implementation phase also **includes stakeholder engagement**. Many MAs emphasise the importance of continuous engagement with stakeholders (see, for instance the case of the ESF+ programme in Sardinia, Italy, or the ERDF Pluri-regional programme in Spain, described in Annex G), including industry representatives, potential beneficiaries, and civil society, as essential for programme performance and not just for accountability. Some MAs also report coordination activities implemented directly with the beneficiaries. The process remains interactive even as calls for proposals are being prepared, allowing beneficiaries to provide feedback on the design of specific measures and ensuring that the programme addresses their needs effectively. Moreover, bilateral meetings are often conducted with intermediate bodies and those implementing ITI/CLLD to resolve specific issues, fostering a collaborative approach to problem-solving (see for instance the ERDF/ESF+ Programme

in Romania, described in Annex G). Moreover, regarding financing checks and monitoring, a thorough review is conducted before funding a project to confirm that it is not already financed by another source. Additionally, regular monitoring involving beneficiaries is carried out to guarantee the smooth implementation of projects and to proactively manage any arising challenges or opportunities.

Overall, the modalities of coordination that emerged during the interviews can be categorised into different types:

- *Vertical / Horizontal.* Vertical coordination pertains to collaboration among national, regional, and local levels (on this, see the ERDF-ESF+ Regional programme Île-de-France et bassin de la Seine described in Annex G). According to respondents, this multilevel coordination is essential for tailoring programmes to local needs while aligning them with national strategies and EU directives. This process occurs in two directions: top-down and bottom-up. National authorities often provide overarching guidance and regulatory frameworks, while regional and local bodies contribute insights into the local context and specific needs, leading to more nuanced and effective programme implementation. Regional steering groups are often established, comprising representatives from different governmental levels. These groups are crucial for discussing regional strategies, aligning them with national objectives, and ensuring that local perspectives are incorporated. The engagement of local authorities is also important. They are perceived as crucial not only for understanding and addressing specific community needs but also as effective bodies for implementing projects at the ground level.

Horizontal coordination occurs across sectors and themes. This type of coordination involves collaboration between different organisations and entities within a particular sector, such as innovation. Commonly utilised tools include thematic working groups and committees. These groups focus on specific themes or sectors, facilitating the sharing of expertise, resources, and best practices. They assist in aligning sector-specific goals with broader programme objectives. Stakeholder engagement is key: involving industry representatives, NGOs, academia, and other relevant stakeholders to ensure a comprehensive approach that addresses the various facets of a particular sector or theme.

- *Formal / Informal.* Formal structures include specific coordination bodies which are particularly significant when they involve different organisations, as they play a pivotal role in ensuring coordinated efforts across various programmes. The box below showcases how an Italian region, Tuscany, has institutionalised the coordination process by shaping its own organisation and creating ad-hoc bodies. Informal coordination encompasses informal networks, including programme officials, experts, and stakeholders, often providing a platform for quick information exchange and problem-solving, complementing formal coordination structures (see the ERDF Pluri-regional programme in Spain or the Thematic Programme for Climate Action and Sustainability in Portugal, described in Annex G).
- *Strategic / Technical.* Strategic coordination includes joint planning and strategy meetings, which are critical for aligning the strategic directions of the programme and ensuring that calls for proposals and project selections are coordinated to support the overall objectives of the CPR programme. Additionally, technical expertise can be shared, and discussions on specific technical issues can occur, even outside the programme (see for instance the Mecklenburg-Vorpommern ESF+ Programme in Germany, described in Annex G). Technical coordination also encompasses shared instruments, such as databases or information systems, to maintain an overview of the programme's progress and facilitate information sharing between different programmes and funds.

Box 3. Examples of coordination mechanisms at the PR level.

In **Bulgaria**, vertical coordination based on an information exchange mechanism with beneficiaries is in place. Local municipalities acting as beneficiaries, report on projects receiving support through the programme via regular reporting to the MA. These regular reports encompass detailed reporting requirements, including a dedicated section on complementarities. All communication is facilitated through the Information System for the Management and Monitoring of EU Funds in Bulgaria (ISUN/ИСУН).

The Tuscany Region in **Italy** has established a formal mechanism of coordination based on a new directorate for regional competitiveness. This coordination places all three MAs under a single organisational structure that extends across the entire region. Furthermore, within the programming of the CPR funds, definitive programming decisions have been made to articulate complementarity between the ERDF and ESF+. A special steering committee has been formed under the guidance of the regional Secretary-General. Efforts are underway to establish more concrete foundations for detailing unified programming and thereby coordinating the funds. Representatives from the EMFAF, JTF, the Regional Development and Cohesion Plan ⁽³⁹⁾, etc., including all regional MAs, participate in the coordination body.

Source: Consortium elaboration

Finally, in the implementation phase, the interviews with MAs highlighted the key role played by the **Monitoring Committee** (MC) in coordinating CPR programmes. It provides oversight, facilitates multilevel and stakeholder collaboration, ensures programme alignment and compliance, and plays a crucial role in the continuous evaluation and adjustment of programme strategies and activities. More details are provided in the dedicated section 2.4.

2.2. Coordination between CPR funds and EU funds and instruments

This section addresses coordination between CPR funds and other EU funds and instruments. The first subsection analyses the modalities of coordination implemented by the EU funds and instruments and specifically, how they coordinate with CPR funds. The second subsection examines how the PA and PRs envisage coordination with EU funds and instruments, focusing on coordination from CPR funds to other EU funds and instruments.

2.2.1. Modalities of coordination of EU funds and instruments with CPR Funds

The work programmes and regulations **at the level of EU funds and instruments** foresee different types of coordination mechanisms that can be adopted at the EU, national and local/regional level. These mechanisms can be grouped into three broad categories: governance, (overall management and coordination), implementation arrangements, (legal and administrative procedures), and joint bodies, (common structures supporting/facilitating implementation). Details are provided in the box below.

⁽³⁹⁾ More on the Italian Development and Cohesion Plan: https://opencoesione.gov.it/it/piani_sviluppo_coesione/.

Box 4. Different typologies of coordination mechanism identified in the EU funds/instruments documents

Governance	Top-down governance refers to coordination mechanisms established at the EU level. These mechanisms may include steering committees, programme management structures, or other formal arrangements, including representatives from the EC services implementing CPR funds.
	Bottom-up governance involves stakeholders at the national, local, and regional levels who come together voluntarily to create synergies and collaborate towards EU objectives, leveraging different resources to achieve their objectives.
Implementation arrangements	Planning/programming. To enhance coordination efforts, the work programmes include provisions to foster the synergistic use of CPR funds and EU funds and instruments.
	Project / investment selection criteria. In some cases, the EU funds and instruments entail project selection mechanisms aimed at enhancing coordination with other EU resources, specifically with Cohesion Policy funds. In other cases, the project selection mechanisms directly support the Cohesion Policy objective thereby incorporating a territorial approach. Application of common rules. One way of enhancing coordination (and simplification) is by adopting part of the normative framework for a specific instrument or sector.
	Monitoring and Evaluation. Several EU funds and instruments aim to assess the extent of complementarity and synergies with other EU resources in their evaluation and monitoring processes.
Joint structures	Joint support facilities. In specific policy areas (e.g., transport and digital connectivity), EU funds and instruments provide technical assistance and guidance to MSs and regions jointly with the CPR Funds.
	Joint implementing bodies. One way to increase coordination is to designate a common implementing body responsible for the implementation of CPR Funds and other EU funds and instruments.

Source: Consortium elaboration

Based on these various mechanism typologies, identified through the documental analysis, the table below indicates which coordination mechanisms can be adopted by each EU fund and instrument. The initial findings indicate that all EU funds and instruments have coordination mechanisms in place. The EAFRD has the highest number of coordination mechanisms (4), followed by HE, LIFE, CEF and the EGF (3). Notably, that EGF is the only EU fund/instrument employing coordination mechanisms across all three categories: governance, implementation arrangements, and joint structures. Moreover, it emerges that the adoption of project selection criteria is the most commonly used mechanism, followed by top-down and bottom-up governance and planning/ programming. Further details on the EU funds and instruments coordination mechanisms are provided in the box below.

Table 14. Coordination mechanisms adopted by the different EU funds and instruments

		TSI	EAFRD	HE	CEF	DEP	InvestEU	LIFE	EU4Health	EGF	Erasmus+
Governance	Top-down governance										
	Bottom-up governance										
Implementation arrangements	Planning/ programming										
	Selection criteria										
	Application of common rules										
	Monitoring and Evaluation										
Joint structure	Joint implementing body										
	Joint support facility										

Source: Consortium elaboration.

Overall, some EU funds and instruments employ direct, ad-hoc coordination mechanisms with Cohesion Policy funds, whereas others utilise more generic approaches. For example:

- In relation to governance, the **TSI** project selection engages officers from DG REGIO, DG REFORM, and DG EMPL. This implies a high level of involvement by Cohesion Policy fund stakeholders and a higher likelihood of establishing synergies. On the other hand, the **EU4Health** Steering Group has a broader scope of coordination without specific contributions from other DGs.
- **HE** Work Plans explicitly mention the relevant Cohesion Policy funds as well as the modalities of interaction, while the **TSI** Work Plan indicates crucial areas of intervention for the Cohesion Policy fund, but does not provide operational details, nor does it name the relevant Cohesion Policy fund or describe how interaction should occur.
- Some selection criteria, such as those pertaining to **LIFE**, certain **ERASMUS+** actions, and **InvestEU**⁴⁰, prioritise general complementarity with other EU funds and instruments, while others, such as the **EAFRD** and **DEP**, make clearer references to Cohesion Policy in their selection criteria.
- Monitoring and evaluation mechanisms also vary in terms of their specificity regarding coordination with Cohesion Policy funds. While the **EGF** demands that MSs explicitly report on coordination with the ESF+, **LIFE** evaluation assesses more general synergies between the programme and other complementary Union programmes.

The box below provides greater detail of these mechanisms.

Box 5. Coordination mechanisms based on governance, implementation arrangements and joint structures, by EU fund and instrument.

Governance	
Top-down governance	<p>The EGF is implemented by DG EMPL. This implies a high level of coordination with the CPR funds, and especially with the ESF+.</p> <p>The TSI, managed by DG REFORM, envisages the involvement of other DGs, namely DG REGIO and DG EMPL, in the selection of MS project applications. This coordination is aimed at identifying synergies and optimising financing.</p> <p>The European Innovation Council (EIC) is a centrally managed initiative under HE, designed to support and promote innovation in Europe. The EIC provides funding and other support to innovative companies, particularly SMEs, that have the potential to develop breakthrough innovations and bring them to market. Among the key features is the exploitation of synergies with other EU funds and instruments as well as CPR programmes, particularly with ESF+ and ERDF.</p> <p>In the framework of EU4Health, a steering group has been established to ensure “consistency and complementarity between the Member States’ health policies, the Programme and other EU policies, instruments and actions, including those pertaining to Union agencies”⁽⁴¹⁾.</p>
Bottom-up governance	<p>The European Digital Innovation Hub (EDIH) is an example of a bottom-up governance arrangement funded primarily by the DEP. Its objective is to drive innovation and competitiveness in Europe⁽⁴²⁾. The EDIH is a collaborative network or organisation that provides a range of services to support the digital transformation of SMEs in various industries.</p> <p>Within the EAFRD, LEADER (<i>Liaison Entre Actions de Développement de l'Économie Rurale</i>) is the most prominent governance mechanism supporting local rural communities in developing and implementing innovative strategies for economic growth and job creation. It can be implemented via multi-funding, and, in this case, a lead fund is selected. The eligibility rules for the lead fund govern</p>

⁽⁴⁰⁾ Those criteria do apply to some the actions delivered by the Programs and not for all of them.

⁽⁴¹⁾ Art. 15 of the EU Reg (EU) 2021/522 establishing a Programme for the Union’s action in the field of health (‘EU4Health Programme’).

⁽⁴²⁾ Art. 16 of the EU Reg (EU) 694/2021 establishing the Digital Europe Programme 2015/2240.

	<p>the implementation of the local development strategy at the level of the local action group. The authorities of the other funds (e.g. the MA of the ERDF in the case of an ERDF/EAFRD approach with the latter as the lead fund) must rely on decisions and management verifications undertaken by the managing or competent authorities of the lead fund.</p> <p>Within HE, the establishment of European Partnerships ⁽⁴³⁾ is designed to bring public and private stakeholders together to collaborate on research and innovation in specific areas of interest. There are several types of European Partnerships, including Institutionalised European Partnerships, Co-programmed European Partnerships and Co-funded European Partnerships. Overall, the European Partnerships are designed to facilitate not only collaboration and coordination between different stakeholders, but also to systematically leverage different EU resources, primarily the ERDF. The governance mechanism in HE is provided by the European innovation ecosystems, which are interconnected networks of actors, organisations, and institutions that support innovation and entrepreneurship in Europe. According to the regulation, the mechanism should be implemented in synergy with, among others, ERDF support for innovation eco-systems and interregional partnerships around smart specialisation topics” ⁽⁴⁴⁾. The LIFE programme comprises two specific categories of projects: ‘strategic nature projects - SNAPS’ and ‘strategic integrated projects – SIP’. Both types aim to optimise synergies with other EU funds and instruments and provide technical assistance and support capacity building. Specifically, SIPs are implemented on a regional, multi-regional, national, or transnational scale and aim to implement environmental or climate strategies or action plans developed by MSs. SIPs ensure that stakeholders are involved and promote coordination and mobilisation of at least one other Union, national, or private funding source. Both project types are encouraged to use the transnational coordination and cooperation platforms provided by the EU macro-regional strategies. Hence, there is a tight connection between the LIFE project SIPs and SNAPS, and the European Territorial Cooperation programmes, which support the transnational cooperation and coordination of the projects. ⁽⁴⁵⁾</p>
Implementation arrangements	
Planning / Programming	<p>In the HE WP (e.g. in Work Programme 2023-2024 - 4. Health), applicants are strongly recommended to seek complementarity with the ERDF and ESF+. In other WPs, applications and proposals should develop a structured system of exchange to establish synergies and avoid duplication:</p> <ul style="list-style-type: none"> • In WP3 (research infrastructure), the recommendation to actively seek synergies refers to other relevant EU, national and regional R&D&I programmes (such as the ERDF, ESF+, JTF, EMFF, EAFRD and InvestEU) (WP3, p.9). Furthermore, proposals should develop initial financial plans for the implementation and operation of the infrastructure as well as preliminary ideas for long-term sustainability, incorporating synergies with other funds and programmes such as the ERDF (p.15). • In WP5 (culture, creativity and inclusive society), the same recommendation is found across all Cohesion Policy funds on p.8. • Similarly, in WP 7 (digital industry and space), the same recommendation is found across all Cohesion Policy funds on p.14. • Likewise, in WP8 (Climate, energy and mobility), a similar recommendation is provided on p. 18. Correspondingly, in WP9 (food, bioeconomy ...) a similar recommendation is offered on p.19.

⁽⁴³⁾ Art. 10 of the EU Reg (EU) 2021/695 establishing Horizon Europe.

⁽⁴⁴⁾ ANNEX I of the EU Reg (EU) 2021/695 establishing Horizon Europe.

⁽⁴⁵⁾ ANNEX to the EU Commission Implementing Decision on the adoption of the multiannual work programme for the years 2021-2024 for the LIFE programme, p. 21.

	<p>The CEF WP dedicates specific sections to describing the activities related to the funds transferred from Cohesion Policy funds (i.e., <i>Cohesion envelope</i>) ⁽⁴⁶⁾.</p> <p>The TSI WP for 2022 ⁽⁴⁷⁾ outlines several areas where interactions with the Cohesion Policy funds are planned, primarily providing support in the following areas: labour market; skills, education and training; the business environment; and social protection and welfare.</p> <p>Regarding the content of the Strategic Plan, the EAFRD requires national authorities to provide a comprehensive outline of interventions, including an overview of the coordination, demarcation and complementarities between the EAFRD and other Union funds active in rural areas.</p>
Project / investment Selection criteria	<p>The DEP awards projects addressing the territorial digital divide ⁽⁴⁸⁾. It aims to select projects that ensure coverage of the needs of both industry and areas of public interest. This objective is to provide comprehensive and balanced geographical coverage, thereby improving convergence between MSs benefiting from the Cohesion Fund for 2021 to 2027 to bridge the digital divide in geographical terms.</p> <p>InvestEU uses a Scoreboard to assess requests and ensure ‘additionality’ in investment projects. Additionality entails InvestEU focussing on projects with a higher risk profile, while, for example the ERDF, CF and JTF are designed to promote regional development. This allows for more targeted and effective use of EU funds, ensuring they are allocated to projects that align with their specific goals and objectives ⁽⁴⁹⁾.</p> <p>The EAFRD identifies ‘demarcation areas’ to differentiate and avoid duplication with Cohesion Policy funds in large-scale infrastructure, except for broadband and flood prevention or coastal protection actions ⁽⁵⁰⁾.</p> <p>The LIFE programme selection criteria encompass projects that build on or upscale the results of other projects funded by the LIFE Programme, its predecessor programmes or other Union funds. These benefit from a bonus in their evaluation ⁽⁵¹⁾.</p> <p>In certain actions, in relation to impact, ERASMUS+ requires synergies/complementary with other (EU and non-EU funded) activities that can build on the project results ⁽⁵²⁾.</p> <p>In the TSI application, to identify complementarity with other resources, although Cohesion Policy funds are not specified, it is necessary to specify whether and which other means / funding (at the national, regional, EU, or international level) have been considered to address the identified issue. It is also necessary to specify the complementarity of other funds with the technical support requested. Moreover, to avoid double funding, the recipient national authority shall immediately inform the European Commission of other related ongoing actions financed by the EU budget.</p>

⁽⁴⁶⁾ Ref. ANNEX to the EC Implementing Decision on the financing of the Connecting Europe Facility – Digital sector and the adoption of the multiannual work programme for 2021-2025.

⁽⁴⁷⁾ Ref: 2021 work programme for the Technical Support Instrument under Regulation (EU) 2021/240 of the European Parliament and of the Council.

⁽⁴⁸⁾ Ref: art 20, reg (EU) 694/2021 Establishing the Digital Europe Programme 2015/2240.

⁽⁴⁹⁾ Ref: art 22, reg (EU) 2021/523 establishing the InvestEU Programme.

⁽⁵⁰⁾ Ref. art. 73 reg (EU) 2021/2015 establishing rules on support for strategic plans to be drawn up by Member States under the CAP and financed by EAGF and EAFRD.

⁽⁵¹⁾ Ref. art. 14 reg (EU) 2021/783 establishing a Programme for the Environment and Climate Action (LIFE).

⁽⁵²⁾ Ref (for example) p. 266 of the Erasmus+ Programme Guide 2022.

Application of common rules	<p>The EAFRD applies the same rules as the CPR funds regarding financial instruments ⁽⁵³⁾; the eligibility of costs incurred for LEADER ⁽⁵⁴⁾; the publication of information relating to beneficiaries ⁽⁵⁵⁾.</p> <p>In case of resources transferred from the CF, the CEF adopts (partially) the same rules in terms of eligibility and co-financing ⁽⁵⁶⁾.</p>
Monitoring and evaluation	<p>The EGF requires beneficiaries to report on synergies and complementarities with other Union funds, particularly the ESF+ ⁽⁵⁷⁾, to minimise the risks of duplication and double funding. Lessons learned in the previous period, particularly in relation to young people not in employment, education or training, (NEETs), have influenced these risk mitigation measures. Notably, the programme period 2021-2027 does not include NEETS as a beneficiary group, as the ESF+ is deemed more suitable for addressing their needs.</p> <p>Among LIFE's evaluation questions are the extent to which synergies between the objectives have been reached and the LIFE Programme's complementarity with other relevant Union programmes. Furthermore, the Commission shall assess synergies between the LIFE Programme and other complementary Union programmes and those between its sub-programmes ⁽⁵⁸⁾.</p>
Joint structures	
Joint support facilities	<p>The Broadband Competence Offices (BCOs) Support Facility, funded through the CEF programme, helps regions and MSs overcome the various technical, financial, and regulatory challenges that arise when planning and deploying high-speed broadband networks. The programme provides technical assistance, guidance on financing and funding opportunities, and project management and stakeholder engagement support. BCOs may also receive funding from ERDF to support the implementation of broadband infrastructure projects in their respective regions or member states ⁽⁵⁹⁾. The CEF also supports JASPERS as part of the horizontal technical assistance ⁽⁶⁰⁾.</p> <p>To further enhance coordination and potential synergies, the InvestEU Advisory Hub provides an additional mechanism to support the blending of grants or financial instruments. It aims to maximise the leverage and impact of InvestEU, while also promoting coordination between various Union programs in order to amplify their collective impact ⁽⁶¹⁾.</p>
Joint implementing bodies	<p>The EGF and ESF+ often share the same MA responsible for implementation. Although this is not an EC requirement, most MSs have chosen to adopt this approach ⁽⁶²⁾.</p>

Source: Consortium elaboration

2.2.2. Intensity and modalities of coordination between CPR funds and EU funds and instruments

At the PA level, the document analysis revealed that only 10 out of 27 MSs provide a detailed description (i.e. a high level of coordination) of the forms and mechanisms of

⁽⁵³⁾ Ref. art. 80 reg (EU) 2021/2015 establishing rules on support for strategic plans to be drawn up by Member States under the CAP and financed by EAGF and EAFRD.

⁽⁵⁴⁾ Ref. art. 77, same reg. above.

⁽⁵⁵⁾ Ref. art. 98 reg (EU) 2021/2116 on the financing, management and monitoring of the common agricultural policy.

⁽⁵⁶⁾ Ref. art. 15 and 16, reg (EU) 2021/1153 establishing the Connecting Europe Facility

⁽⁵⁷⁾ Ref. art. 20 reg (EU) 2021/691 establishing the European Globalisation Adjustment Fund for Displaced Workers (EGF)

⁽⁵⁸⁾ Ref. art. 19-20 reg (EU) 2021/783 establishing a Programme for the Environment and Climate Action (LIFE)

⁽⁵⁹⁾ Ref. p. 46 of ANNEX to the EC Implementing Decision on the financing of the Connecting Europe Facility – Digital sector and the adoption of the multiannual work programme for 2021-2025.

⁽⁶⁰⁾ P. 19, same above document.

⁽⁶¹⁾ Ref. art 25 reg (EU) 2021/523 establishing the InvestEU Programme.



⁽⁶²⁾ Ref. p. 14 of the Report of EC on the activities of the European Globalisation Adjustment Fund (EGF) in 2019 and 2020.

collaboration and communication between CPR funds and EU funds and instruments. These are Cyprus, Germany, Finland, Hungary, Luxembourg, the Netherlands, Poland, Romania, Slovakia, and Spain. For instance, the Polish PA describes how the Ministry of Health will coordinate with relevant committees and stakeholders to implement the EU4Health programme and all health-related interventions planned with the ERDF and ESF+.

In seven PAs, the modalities to ensure structured coordination are described, but in less detail (i.e. medium level of coordination). For example, the PAs of Italy and France mention that the institutions and bodies responsible for implementing the funds will collaborate to avoid overlap and clearly demarcate the line of interventions, but without providing any specific details on the modalities and mechanisms. In Greece, the forms of collaboration between CPR funds and the EAFRD are mentioned, but for the other funds and instruments, no details are provided. A total lack of accurate, comprehensive information characterises other PAs, such as those of Estonia, Denmark, Slovenia, Austria and Lithuania.

At the PR level, as highlighted in the table below, the overall level of collaboration and communication mechanisms between the CPR funds and the EU funds and instruments is low, as a very small number of programmes specify any form of structured coordination mechanisms.

Table 15. High/medium collaboration and communication between CPR funds and EU funds and instruments

Collaboration with 	TSI	EAFRD	HE	CEF	DEP	InvestEU	EU4Health	EGF	Erasmus+
ERDF	-	9%	3%	1%	1%	-	-	-	-
ESF+	-	4%	1%	-	-	-	-	-	-
CF	-	-	-	4%	4%	-	-	-	-
JTF	4%	13%	2%	-	-	-	-	-	-
EMFAF	-	8%	-	4%	-	-	-	-	-
AMIF	-	4%	-	-	-	-	-	-	-
BMVI	-	-	4%	-	-	-	-	4%	-
ISF	-	-	8%	-	-	-	-	-	-
Communication with 	TSI	CAP	HE	CEF	DEP	InvestEU	EU4Health	EGF	Erasmus+
ERDF	1%	5%	1%	1%	1%	1%	1%	1%	-
ESF+	1%	4%	-	-	-	-	-	-	-
CF	-	-	-	4%	4%	-	-	-	-
JTF	2%	11%	2%	-	-	-	-	-	-
EMFAF	-	4%	-	-	-	-	-	-	-
AMIF	-	-	-	-	-	-	-	-	-
BMVI	-	-	4%	-	-	-	-	4%	-
ISF	-	-	8%	-	-	-	-	-	-

Source: Consortium elaboration based on survey data.

Note: The percentages represent the share of programmes with medium or high levels of collaboration and communication mechanisms over the total number of programmes financed by the CPR funds.

The findings from the document review were confirmed by the interviews. In fact, the majority of respondents report some form of collaboration or communication, with nearly a third lacking proper coordination. These respondents cite administrative complexity, the absence of targeted coordination efforts, limited institutional communication, and the pursuit of unique, compartmentalised programme goals as barriers to establishing coordination with

EU funds and instruments, resulting in lost potential for synergistic actions (see the following chapter for a more detailed analysis of the challenges and difficulties). In some cases, coordination between the CPR funds and EU funds and instruments is facilitated through the **MC** (see the focus on the role of MC in section 2.4) and **dedicated structures**, which may function as either administrative units or committees comprising members from diverse departments or even different organisations. Additionally, MAs often foster a bottom-up approach to coordination by aiding and advising their beneficiaries on applying for EU funds and instruments. Both methods are exemplified in the box below.

Box 6. Example of coordination at PR level.

The 2021-2027 Southern, Eastern and Midland Regional Programme in **Ireland** coordinates with two EU instruments with different modalities. Firstly, the LIFE programme focuses on capacity-building actions rather than collaboration on interventions in specific SOs. Many members of the programme's ETC network are engaged in LIFE-funded projects, facilitating further funding for other ETC initiatives. Secondly, concerning HE, during the programme's design stage, regular contact was maintained with intermediary bodies, particularly in the priority area of R&D&I. This involved three national bodies: Enterprise Ireland, Science Foundation Ireland, and the Higher Education Authority, all of which are conversant with the funding landscape and collaborate with the MA of the ERDF, ESF+, and NRRP. These bodies also serve as NCPs for HE. The Southern Assembly is proactive in choosing HE projects that align with and can enhance their regional programme. This indicates a strategic approach to leveraging complementarities across different EU instruments and funds.

The **EAFRD** was mentioned less frequently than might be expected, and the programme authorities interviewed justified this lower propensity for coordination by its exclusion from the CPR regulatory context. They view the EAFRD as part of a different programming environment, a sentiment that is further influenced by the fact that, in 2021-2027, it is managed at the central level rather than at the regional level. Other key findings include:

- **HE** notably coordinates extensively with the ERDF, primarily in the research and innovation sectors. The mechanism includes engaging intermediary bodies and optimising the ERDF's impact through strategic project selection, notably, those projects recognised by the SoE. Other examples include the new possibility of transfers from the ERDF to Horizon Europe currently being implemented, the ERDF being used as complementary funding in 'Teaming' projects, and Cohesion Policy funds supporting European Partnerships, for example, funding the national contribution with the ERDF. HE also acts in coordination with the ESF+, JTF, and EMFAF through various initiatives and common goals.
- The **Erasmus+** actively coordinates with the ESF+. This happens through the implementation of the SoE, the transfer of funds, the appointment of national agencies as intermediate bodies, and the management of the ESF+ to fund Erasmus+ projects. Other mechanisms, such as regular interactions between Erasmus+, the national agencies and MAs, are also mentioned.
- The **DEP** actively coordinates with the ERDF to co-finance projects promoting digital transformation through EDIHs.
- The **LIFE** programme coordinates with the ERDF and JTF, seeking alternative funding when projects fall outside its direct funding scope.
- The **EAFRD** aligns with the ERDF and, less often, with the ESF+, supporting a broad array of rural development initiatives.
- **InvestEU**, renowned for its investment guarantee approach, coordinates with the ERDF to support SME development. Furthermore, it was mentioned that the JTF might utilise instruments like InvestEU to foster a low-carbon economy.

- The **CEF** coordinates with the CF, particularly in financing large-scale infrastructure projects
- Finally, the **TSI** specifically coordinates with the JTF, indicating a focused strategy for regional development.

2.3. Coordination between Cohesion policy funds and RRF

This section deals with the coordination mechanisms established between Cohesion policy funds and NRRPs. The first subsection analyses how the NRRPs are designed to coordinate with CPR funds. The second subsection examines, conversely, how Cohesion Policy programmes envisage coordination with NRRPs.

2.3.1. NRRP coordination mechanisms with Cohesion Policy programmes

The analysis of the NRRP documents reveals that, in terms of *collaboration mechanisms*, ten MSs provide specific details of intense and structured collaboration with the CPR funds (i.e. high level of collaboration). These MSs are Belgium, Bulgaria, Czech Republic, Estonia, Latvia, Malta, Poland, Portugal, Romania and Slovakia. Overall, in these MSs, the bodies in charge of implementing and monitoring the EU Cohesion Policy are also responsible for interventions under the NRRP (see box below for examples). Additional structures are established in some cases to ensure more effective coherence and consistency among the different interventions.

An additional eight MSs (Cyprus, Croatia, France, Greece, Hungary, Netherlands, Spain and Slovenia) have governance structures to ensure collaboration between Cohesion Policy funds and their NRRPs, but these are not detailed (i.e. medium level of collaboration). For instance, the NRRP of France indicates that the National Agency for Territorial Cohesion is responsible for coordinating the cohesion funds and has initiated a series of thematic working groups aimed at clarifying the financing schemes for measures that could be financed by different funds and pre-identifying the lines of complementarity by type of measure (see Annex G). The NRRP of Slovenia does not describe the collaboration mechanisms but includes specific guidelines to ensure coherent interventions between the NRRP and CPR funds. In the case of Spain and Hungary, it is briefly mentioned that a technical committee chaired by the General Secretariat of European Funds (within the Ministry of Finance) will ensure coordination between the NRRP and Cohesion Policy interventions.

Eight MSs (Austria, Germany, Finland, Ireland, Italy, Lithuania, Luxembourg, and Sweden) do not provide any details on the collaboration mechanisms established between their NRRPs and CPR funds but merely mention them (i.e. low level of collaboration). For instance, the Italian NRRP only makes references to the NRRP verification and control system inspired by the Cohesion Policy funds. The NRRP of Sweden states that the authorities in charge of managing other EU funds play a crucial role in effectively implementing the NRRP due to their experience. The document refers to the Swedish Agency for Economic and Regional Growth, the Swedish ESF Council, and the Swedish Board of Agriculture as government appointed entities to promote synergies and avoid double funding without providing further details.

Finally, one MS, Denmark, makes no reference to structures for ensuring collaboration in implementing the NRRP and Cohesion Policy interventions.

Box 7. Examples of 'high' collaboration mechanisms in the NRRPs

The NRRP of **Belgium** specifies how the regional structure responsible for Cohesion Policy funds will align with the ministerial units and departments overseeing the NRRP. Additionally, it explains how regional actors managing the Cohesion Policy funds will also take responsibility for implementing and monitoring NRRP interventions, drawing on their experience within Cohesion Policy. For instance, in the case of the Brussels region, Brussels International, the department in charge of preparing, implementing, and monitoring ERDF regional programmes, will be responsible for following up on interventions planned in the region by the NRRP. This department has the necessary experience to monitor ERDF programmes, and to take charge of NRRP interventions. Moreover, the NRRP has individuated the Brussels Finance Inspectorate, an independent audit authority for the ERDF and ESF+ programmes, to participate closely in managing NRRP interventions. In addition, a technical monitoring committee will be set up to ensure consistency in the reporting method for NRRP interventions, the proper project implementation in accordance with the regulations and, in general, to address all issues related to coordinating NRRP implementation at the Brussels level.

The NRRP of **Poland** indicates that the Ministry of Funds and Regional Policy is responsible for elaborating the NRRP and ensuring the coordination of its activities with other EU funds. The Ministry is also responsible for preparing strategic and programmatic documents specifying the spending of Cohesion Policy funds in 2021-2027 (PA and national programmes). The NRRP highlights that both the PA and the programmes were prepared in close cooperation with line ministries, regional actors, social and economic partners, and non-governmental organisations. Eventually, the Ministry of Funds and Regional Policy will verify the NRRP achievements and assess the coordination of activities carried out under the NRRP and Cohesion Policy funds.

Source: Consortium elaboration.

In terms of *communication*, nine NRRPs (Belgium, Croatia, Czech Republic, Estonia, France, Hungary, Luxembourg, the Netherlands and Slovakia) provide a clear and defined description of mechanisms to ensure the exchange of information and data with Cohesion Policy funds, indicating a high level of communication. Another nine (Bulgaria, Germany, Greece, Malta, Poland, Portugal, Romania, Sweden and Slovenia) exhibit evidence of 'medium level' communication mechanisms, while eight NRRPs (Austria, Cyprus, Denmark, Spain, Finland, Ireland, Italy, and Lithuania) offer few details indicating a low level of communication. Notably, in Latvia's NRRP, there is no reference to communication mechanisms whatsoever.

Box 8. Examples of coordination mechanisms in the NRRPs

In the **Netherlands**, the departments in charge of implementing, monitoring and coordinating the NRRP interventions maintain close contact with the policy directorates managing the Cohesion Policy fund interventions. The latter receives progress updates on NRRP implementation through various channels. Both the NRRP and Cohesion Policy fund management maintain and exchange a list of measures for implementing reforms and investment projects within the framework of the NRRP. This list includes the total amount of public funding allocated to such measures, indicating the payments made under the Facility and other Union funds. To avoid double funding, a central data system provides data on the NRRP beneficiaries. This information is centrally managed by ministries and will be communicated to the coordinating body for the NRRP and the Cohesion Policy funds via data system extracts.

In the **Czech Republic**, coordination between the management systems implementing the NRRP and other programmes under the PA occurs through the mutual participation of the ministries in charge of NRRP implementation in the Cohesion Policy programme steering committees and vice versa. Departments conduct coordination and monitoring activities to

supervise objectives milestone fulfilment. Cohesion Policy fund MAs and NRRP departments are interconnected through an information system to exchange financial information.

Source: Consortium elaboration

Thirteen of the 27 NRRPs combine collaboration and communication to provide a clear and detailed description of the coordination mechanisms, demonstrating a high level of coordination. The absence of detailed coordination mechanisms in several MSs can be attributed to the narrower timeframe in which the NRRPs were developed compared to the Cohesion Policy programmes. As a result, detailed coordination mechanisms for efficient and effective interaction with Cohesion Policy funds were not always provided. In addition, the RRF is a new instrument that national governments are still acquainting themselves with and for which they need to establish and adopt new, smooth and sustainable governance structures.

However, when NRRPs do describe coordination mechanisms with Cohesion Policy funds, it appears that the bodies responsible for the NRRP have leveraged the lessons learnt, and the experiences and implementation modalities gained from the Cohesion Policy programmes. Moreover, in many cases, the ministries responsible for managing RRF funds are also entrusted with implementing CPR programmes. Aligning the (reform⁽⁶³⁾) and investment priorities and their implementation under the NRRPs with longstanding programmes requires meticulous planning to ensure synchronized efforts and prevent misalignments in objectives.

2.3.2. Cohesion Policy programme coordination with NRRPs

Most Cohesion Policy programme authorities engage in some level of coordination with the NRRP. However, a third of the interviewees revealed that coordination does not occur. This is primarily due to difficulties in interaction between different government levels, particularly at the regional and national levels. Interestingly, some of the MAs perceive this lack of coordination not only as a reporting issue but also as a potential detriment to NRRP management itself. MAs argue that they have accumulated significant experience, which could have been capitalised upon by the NRRP, but this opportunity could not be exploited without coordination. This is clarified in this statement made by one MA:

‘There is no established coordination between the NRRP and the MA. The NRRP was implemented as a national programme under the administration of the Ministry of Finance, independent of regional or other programme collaborations. The Ministry, lacking prior MA experience, has occasionally sought assistance, but reciprocal interactions have not been observed’.

In some cases, cooperation occurs exclusively during the programme design phase. This phase focuses particularly on demarcating roles and responsibilities, ensuring clear distinctions and efficient collaboration between various programmes. Regular **high-level meetings** facilitate the alignment of objectives and strategies, with an emphasis on identifying and utilising synergies. The box below provides an example of demarcation in the programme design phase in Cyprus.

Box 9. Example of coordination mechanisms in the PRs.

In **Cyprus**, the Directorate General Growth, Ministry of Finance, serves as the managing authority for Cohesion Policy funds (Directorate for Cohesion Policy) and is also the Coordinating Authority for the NRRP (Directorate for Recovery). Consequently, there is substantial coordination between

⁽⁶³⁾Out of the scope of the study.

the two directorates, not only during the programming phase but also throughout the implementation phase. In preparing the programming documents, numerous technical meetings were held between the directorates to discuss all potential projects and determine their allocation between the two funding sources. Every policy area and project was scrutinised to ensure clear and transparent demarcation between the two funding sources (RRF and Cohesion Policy), thereby preventing double funding. A detailed table outlining the demarcation between the Cyprus RRP and the Cohesion Policy Programme 'THALIA 2021-2027' is included in the programme.

Source: Consortium elaboration

However, only a few of the programmes analysed mentioned that coordination with the RRF occurs solely in the initial programming phase, while the majority see efforts extending into the implementation phase, often systematically. In some cases, this occurs because the authorities managing the NRRP and Cohesion Policy programmes are the same or fall under the same institutional 'umbrella' (as in the example in the box above). Additionally, several structured mechanisms for coordination are in place.

The most common structural mechanisms include:

- Dedicated interinstitutional/ interdepartmental structures,
- Specific documents serving either strategic or operational/ methodological purposes.

The establishment of an **interinstitutional/interdepartmental structure** serves as a pivotal system of coordination for aligning the objectives of various programmes. This organisation can take the form of a working group or committee, typically comprising representatives from different sectors and levels of government and facilitates regular and structured interactions. It acts as a forum for discussing strategies, sharing insights, and resolving potential conflicts. Less commonly, an internal administrative / thematic unit can also be tasked with overseeing and facilitating coordination efforts. The box below describes the functioning of working groups in Slovakia involving several categories of stakeholders.

Box 10. Example of coordination mechanisms in the PRs.

The coordination mechanism in **Slovakia** encompasses an interdepartmental coordination platform, which includes five working groups (WGs) - five recovery and resilience plan areas and five Cohesion Policy goals. WGs within individual ministries, as well as at the interdepartmental level, will ensure the definition and clarification of the exact dividing lines between EU funds, NRRP, and other financial instruments. WGs are created on the principle of partnership (representatives of the MA, NRRP implementing actors, the business community, the academic community, LRAs, and the third sector). Their meetings will be organised as needed, also during the implementation period. The coordination of WGs is ensured by the Ministry – the Department of EU Cohesion Policy / Department of Coordination of Synergies and Cross-cutting Priorities, in cooperation with the National implementation and coordination authority.

Source: Consortium elaboration

Specific documents might facilitate coordination at two levels: operational/ methodological and strategic. At the operational/ methodological level, the document delineates the details for executing programmes, including coordination protocols, ensuring that the relevant authorities are aware of the procedures and criteria for project selection and programme management. In some cases, the inclusion of tables or matrices proves instrumental in visualising and planning the interaction between various programmes. These tools aid in pinpointing where programmes can complement each other and where they ought to remain distinct to avoid duplicating efforts. Strategic documents specify the roles and outline the

management of multiple funding sources, such as the RRF, ESF+, and ERDF. More importantly, they guide these funds towards achieving national or regional goals.

Finally, in various MSs, as reported in the interviews, **informal coordination** acts as an adjunct to formalised processes, enabling a more responsive and fluid exchange among stakeholders. This can take the form of spontaneous meetings, where participants engage in discussions that may not fit into structured agendas yet are pivotal for project agility. Informal channels, like direct correspondence between programme administrators, often facilitate a level of coordination that formal mechanisms alone cannot achieve. Such informal interactions, while not part of the official record, play a significant role in ensuring the alignment and integration of programme efforts, contributing to the efficient administration of funds and the successful realisation of programme objectives. These interactions are particularly feasible when the same institution manages both the NRRP and Cohesion Policy programmes. To illustrate this, an MA noted that *'coordination between the ERDF and RRF occurs daily, as the institutions overseeing these funds fall under the same ministry, namely the Ministry of Finance. Coordination mechanisms in this context are informal rather than structured'*.

2.4. Focus: Role of Monitoring Committees

This section focuses on the role of the MC as an instrument to promote coordination among both CPR funds and EU funds and instruments. The following analysis is based on a desk review of the MC documents of selected cases, alongside the details that emerged in the interviews of the respective programme authorities.

2.4.1. Composition of the Monitoring Committee

This section presents an overview of the composition of the MC for the selected cases. The programmes analysed represent all Member States, encompassing all CPR funds and programmes managed at both regional and national levels, including multi-fund programmes and those funded by a single fund. This diversity is reflected in the composition of the MC members. Most of the programmes analysed have between 20 and 70 members.

Evaluating the composition of the MCs⁽⁶⁴⁾ is crucial for assessing their role in the coordination mechanisms of the programmes. The inclusion of representatives from the MAs of multiple funds and programmes encourages information exchange and collaboration. These groups, comprising stakeholders from relevant managing authorities, social partners, and EU-level representatives, play an integral part in the coordination process. To assess the MC role and understand the impact of the committee composition, the analysis categorised the selected programmes into three macro groups: Cohesion Policy fund programmes, HOME fund programmes, and programmes financed by EMFAF.

In the programmes financed by Cohesion Policy funds, MCs typically include representatives from the MAs of other Cohesion Policy funds and HOME funds. Notably, not all EU funds and instruments are consistently represented; the RRF and the EAFRD are the most frequently mentioned. The ERDF and ESF+ programmes mostly refer to HE and Erasmus+ representatives in their MCs. The DEP, CEF, LIFE and EGF are more rarely mentioned, while only one programme cites an EU4Health representative and a TSI representative. The composition of the MCs in Cohesion Policy fund programmes reflects the multi-level governance and cooperation dynamics of these programmes. National

⁽⁶⁴⁾ Art. 39 of the Reg (EU) 2021/1060.

programmes in France, Sweden, the Netherlands and Italy showcase both regional and national representatives in the MC. For example, in the case of the Italian national programme Metro+ and southern medium-sized cities (ERDF/ESF+), all the MAs for ERDF and ESF+ in the respective regions are included in the MC. Reciprocally, the regional programmes analysed in Italy, Germany, Sweden, France, the Netherlands, Ireland, Spain and Portugal have national representatives from the MAs of the same funds. Regarding the HOME funds, a sample of eight programmes from different Member States was analysed. All these programmes have a common MA and a joint MC among the HOME funds. Cohesion Policy funds are consistently represented in the MCs of these programmes. On the contrary, EU funds and instruments are rarely represented, with only two programmes citing NRRP representatives in their MCs.

Moreover, a sample of ten programmes financed by the EMFAF was analysed. These are all national programmes, with MAs typically from the Ministry of Agriculture of the respective MS. All have representatives from the programmes financed by Cohesion Policy funds on their MCs. However, representation of the HOME funds and other EU funds and instruments is more diversified, with only a limited number of programmes, including representatives from the EU instruments and funds on their MCs. These are primarily the EAFRD and RRF, the two most represented EU instruments, and LIFE, CEF, DEP, EGF and HE, with very limited representation, found only in Latvia, Finland, and Denmark.

2.4.2. The role of the Monitoring Committee in coordination: the perspective of programme authorities

The MC, as outlined in the CPR, plays a crucial role in overseeing the implementation of programmes and promoting stakeholder involvement. Nonetheless, authorities hold diverse views on its role in coordinating the different funds/programmes, as per the previous paragraphs. Regarding the programmes analysed, approximately one-third of the respondents view the MC as a crucial coordination mechanism, another third sees its coordination role as limited, and the remaining respondents attribute no coordinating function among different funds to the MC.

When evaluating the MC's role in the overall coordination mechanism of the programme, a significant aspect frequently considered is the inclusion of representatives from other programmes, typically encompassing all programmes operating within the programme's geographical scope. As mentioned, the majority of the programmes analysed are funded by Cohesion Policy funds, and their committees consistently include representatives from all other Cohesion Policy funds operating within the same geographical area.

According to some programme authorities, the MC is an integral part of a larger coordination mechanism established to ensure synergy and demarcation. The Lithuanian BMVI programme 2021-2027 is provided as an example in the box below.

Box 11. Example of coordination through the MC

According to the MA representative of the BMVI programme in **Lithuania**, the MC is integral to the coordination process. *'It has a role in the minimisation of the risk of overlapping investments from different funds. Special attention is given to coordinating with fast-paced programmes like the RRF, accommodating different timelines and levels of urgency. The MC played a crucial role in approving urgent expenditures, such as the 10 million euro spent on border wall surveillance cameras, demonstrating its capacity to act quickly and efficiently in response to changing circumstances'*. Insight from the programme authority also underlines the importance of the composition of the MC, as the representatives from multiple programmes are part of the BMVI MC. European Commission and Ministry of Finance participation adds an additional layer of oversight and coordination, enhancing the MC's efficacy.

Additionally, representatives from the BMVI programme authority sit and actively participate in multiple other programme MCs, thereby '*encouraging a holistic approach to planning and execution*'. The Ministry of Interior representatives further participate in other CPR and EU investment programme supervisory commissions, providing a full picture of other programme activities and timelines for better planning.

Source: Consortium elaboration

Another aspect that highlights the centrality of the MC as an instrument of coordination is the possibility of joint MCs. This is often the case for the three HOME funds. A common MC provides significant benefits for these authorities during the implementation phase, especially regarding interactions with beneficiaries, as many are common to all three funds. Other programmes showcase joint MCs, for example, the Croatian ERDF funded programmes presented in the box below.

Box 12. Example of coordination through the MC

The MC acts as a link between two national programmes in **Croatia**, as it is a joint MC between the Integrated Territorial Programme (ERDF/JTF) and the Competitiveness and Cohesion Policy Programme (ERDF/CF). These are both within the scope of the same ministry, which facilitates coordination per se, but certainly, the need to harmonise and standardise procedures between both programmes remains. Moreover, the MC has representatives from all other EU funds and instruments, and this, in cooperation with the other coordination mechanisms described before (i.e. coordination committee, sub-committee and working groups), creates a coherent coordination mechanism. Lastly, the MCs for other programmes function similarly. They all have representatives from other MAs and representatives from the coordinating body.

Source: Consortium elaboration

Other authorities highlight the importance of the MC but assign a limited role to this as a coordination tool, usually complementing it with other mechanisms to ensure coordination of the funds. As mentioned, programme authorities make use of thematic working groups, steering committees and ad-hoc inter-departmental committees to ensure coordination. These groups often focus on specific themes or sectors, facilitating the sharing of expertise, resources, and best practices. In this context, the MC has a diminished role in coordinating multiple funds and programmes or ensuring internal cooperation between stakeholders and beneficiaries.

Nonetheless, demarcation is frequently emphasised as a role the MC is optimally positioned to address, and some respondents associate the previously mentioned ad-hoc instruments with the MC's functions.

Box 13. Example of coordination through the MC

According to the authority of the regional programme 'European Funds for Dolny Śląsk 2021-2027' in **Poland**, the MC serves as a forum for the exchange of information among members and the discussion of project selection criteria. However, it plays also the role to prevent support from overlapping with other aid mechanisms. This is chiefly achieved through representatives from the Ministry of Funds and the European Commission. A notable best practice involves the informal working groups operating within the MC, in which criteria are deliberated before formal presentation to the MC. During these working group sessions, issues of complementarity with other instruments are often raised to ensure the greatest possible synergy for the region. Representatives of the Ministry of Funds, the EC, as well as individuals and experts from outside the MC, are also invited to participate in the work of the groups.

Source: Consortium elaboration

While several authorities cited representatives from EU funds and instruments as well as the RRF in their MC, only some respondents provided details on the role of the MC in coordinating these funds. One such example is presented in the box above.

A category of respondents, instead, emphasised that the MC must fulfil several requirements pertaining to overseeing and monitoring the implementation of programmes, as prescribed by the CPR. However, they observed a limited connection between these requirements and the coordination mechanisms outlined in the previous paragraphs. In these instances, according to the programme authorities, the MC is seen as a more formal instrument of coordination that nonetheless requires other dedicated organisations, such as working groups, to ensure fund coordination.

2.5. Overall coordination assessment

Based on the information that emerged from the document analysis and the interviews, this section illustrates the main rationale, benefits and challenges related to coordination among EU programmes, funds and instruments.

2.5.1. Rationale for coordination

As a general finding, coordination is not merely beneficial but essential for the successful realisation of programme objectives and enhancing the overall effectiveness of the interventions. More specifically, the interviewees identified two specific types of benefits: one related to increasing the impact and results of the funds (strategic coordination) and another more related to enhancing the performance of the programmes (operational coordination).

In relation to **strategic coordination**, the following elements have been identified:

- Coordination enables programmes to **broaden their scope and impact**. By coordinating resources from various funds, projects can be scaled up, increasing their effectiveness. A well-known example, identified in many MSs, is when the ERDF and ESF+ are coordinated for regional development: the ERDF may fund the infrastructure development of a new training facility, while the ESF+ supports the training programmes offered within that facility, ensuring that both the physical and human capital aspects of regional development are addressed. Another example is the coordination between LIFE projects and the EMFAF in environmental conservation, where large-scale interventions are necessary.
- Aligning programmes towards shared objectives ensures **efficient fund utilisation** and prevents overlapping activities. Illustrative of this is the case where the AMIF and ESF+ programmes coordinate in several MSs. The AMIF might fund initial asylum seeker support services, while the ESF+ provides job training and integration programmes for long-term settlement, ensuring a smooth transition for migrants from initial entry to full integration into society.
- Through coordination, programmes can achieve **innovative and more effective solutions**. This is particularly valuable in situations with constraints like limited preparation time and varying management styles. For instance, the RRF benefits significantly from the ERDF's strategic approach, aligning innovative practices with long-term national goals.

- Coordination enhances the scope of **capacity-building** efforts. By involving a diverse range of stakeholders and aligning different funding streams, capacity building becomes more extensive, ensuring informed participation across various programmes and enhancing overall efficacy.

On the side of **operational coordination**, the most important elements are:

- Coordination between different MAs fosters a **collaborative culture**, which is essential for the coherent and efficient implementation of programmes.
- Coordination offers much-needed **flexibility** in management, especially for thematic funds. By coordinating with larger programmes, smaller funds can achieve goals beyond their individual capacities. An example is the coordination between CLLD and the EMFAF in local community projects.
- While coordination can introduce complexity, it also **streamlines processes**. Internal coordination within programmes managing multiple funds simplifies decision-making. This is exemplified in the coordination of the ESF+ and ERDF within single programmes, reducing administrative burdens.

2.5.2. Challenges and facilitating factors in coordination

Despite the many benefits, establishing coordination mechanisms comes with associated costs and implementation difficulties. In fact, half the interviewees reported challenges in ensuring coordination. One third, on the other hand, reported few to no challenges, while those remaining were still assessing possible challenges of establishing the coordination procedures at the start of the 2021-2027 programming period.

The identified challenges can be grouped into three main categories: general challenges that are independent of the EU/national/regional context, challenges related to the specificity of the EU policy framework, and challenges concerning resources and capacity.

The **general challenges** are primarily related to varied stakeholder perspectives and interests. Reconciling these differences to achieve a common goal requires consensus-building and sometimes compromises. Additionally, maintaining project continuity and adapting to changing circumstances while coordinating multiple funds can be difficult. It requires flexibility and responsiveness from public authorities, which can be proportionally difficult in a rigid administrative setup.

The challenges **stemming from the specificity of the EU institutional framework** relate to the complexity and administrative burden associated with coordinating and harmonising multiple programmes and funds. This involves navigating different sets of rules and regulations as well as differing objectives, target groups, and management styles. It also entails dealing with the time-consuming nature of coordination efforts. For example, managing the different implementation modalities and administrative requirements of various funds like the ERDF, ESF+, and AMIF can pose significant challenges for authorities. Similarly, aligning the strategic objectives of the RRF with other long-standing programmes like the ERDF requires careful planning and coordination. Specifically, related to this programming period, and due to overlapping between the RRF and CPR programme/plan drafting, is the issue of limited preparation time and differing timelines. This can make it difficult to synchronise efforts, leading to misalignments in programme objectives and outcomes and difficulties in communication and information exchange.

Finally, human **resources and capacity** challenges can hinder the effective planning and implementation of coordinated programmes. This is particularly complicated for smaller

programmes or MSs with fewer resources. Likewise, high workload volumes may also affect the ability of larger programmes to encourage coordination efforts. The human resource aspect is also affected by high staff turnover, and the need for continuous capacity building among programme administrators can impede effective coordination. Repeated training efforts are necessary to ensure that all stakeholders are well-informed and capable of managing the complexities of multiple funding streams.

However, the intensity and nature of these challenges vary considerably depending on the scope and framework of the coordination:

- **Among CPR Funds:** the CPR provides a cohesive regulatory framework that guides the administration of various structural and investment funds. This shared regulatory backdrop simplifies coordination among CPR funds, as MAs operate under a common set of rules and expectations. It ensures a more seamless alignment of programmatic goals and administrative processes. This is confirmed by the fact that all CPR MAs acknowledge some form of structured coordination, often both in the programming and implementation phases.
- **Coordination with NRRPs:** the NRRPs presents a set of challenges and opportunities for coordination. On the one hand, sharing the same implementing bodies or national legislative frameworks can aid in harmonising efforts. On the other hand, some MAs report a lack of structured coordination or admit to only occasional collaboration. This points to a need for more robust mechanisms to ensure that NRRP initiatives are effectively integrated with other funding streams.
- **Coordination with other EU funds and instruments:** the coordination with other EU funds and instruments—such as HE, LIFE, EAFRD, and DEP—emerges as the most complex. Not all MAs have a coordination mechanism in place, and when they do, it is typically confined to a select number of MAs and EU funds and instruments.

The evidence from the interviews underscores a clear trend: while structured coordination is a common practice, its depth and consistency are not uniform across all types of coordination. Notably, engagement with the RRF and other EU funds and instruments is less frequent, indicating a potential area for development. The conclusion drawn from the interviews is visually represented in the accompanying table below, where the number and types of challenges perceptibly increase when moving from coordination among Cohesion Policy funds to CPR funds, and then to RRF and to other EU instruments. This gradient reflects the escalating complexity of coordination as the scope of integration broadens and the involved funds become more specialised and more distant from the MAs.

Table 16. Challenges in coordination mechanisms

	Among CPR funds	Between CPR funds and RRF	Between CPR funds and other EU Instruments
<i>Human resources</i>	✓	✓	✓
<i>Time resources</i>	✓	✓	✓
<i>Alignment of objectives & priorities</i>	✓	✓	✓
<i>Effective communication</i>	✓	✓	✓
<i>Regulative framework</i>		✓	✓

<i>Timing</i>		✓	✓
<i>Diverse objectives and management styles</i>			✓
<i>Coordination across MSs</i>			✓

Source: Consortium elaboration.

3. Synergies and demarcation

As outlined in the methodology, the study analyses whether the CPR programmes, EU funds and instruments and NRRPs envisaged mechanisms to ensure synergistic interventions and demarcation and thus strengthen complementarity among these programmes and funds.

Synergies occur when two or more funds/instruments interact at the intervention level or delineate clear boundaries between the various funding sources. As detailed in the methodological section (see the introduction), the synergies are grouped into four clusters:

- **phased (P)**, which includes sequential and alternative,
- **concurrent (C)**, which includes combined and cumulative,
- **transfer (T)**,
- **demarcation (D)**.

When a synergy is expected to occur, but the document does not specify the modalities or forms of interaction, the synergy is indicated as **NS** (i.e. Not Specified). For detailed definitions, please refer to Annex A1.

This section is structured as follows:

- **Section 3.1** illustrates synergies and demarcation among the CPR funds in terms of intensity and modalities for carrying out the synergistic interventions at the operational level.
- **Section 3.2** describes synergies and demarcation between the CPR programmes and the EU funds and instruments, both in terms of intensity and implementation mechanisms.
- **Section 3.3** presents synergies and demarcation between the Cohesion Policy funds and the NRRPs in terms of intensity and the operational schemes for carrying out the synergistic interventions at the operational level.
- **Section 3.4** investigates the financial synergies envisaged among the CPR programmes, between the CPR programmes and the EU funds and instruments, and the budgetary contributions to InvestEU.
- **Section 3.5** presents the key elements emerging from the study on the potential benefits of implementing these synergies and the factors that may support or hinder them, considering both internal and external aspects.

3.1. Synergies and demarcation among CPR funds

This section illustrates the intensity and typology of synergies and demarcation detected among the CPR funds and the mechanisms envisaged to implement these synergistic interventions at the operational level. Specifically, the first subsection investigates the intensity of synergies and demarcation by identifying which CPR funds envisage synergies with other CPR funds and illustrating the main types. The second subsection explains the

mechanisms for implementing these synergies, detailing how the interventions will be coordinated and executed using different funds.

3.1.1. Intensity of synergies and demarcation among CPR funds

From the documental analysis at the **PA level**, the ERDF emerges as the primary fund interacting with all other CPR funds. Most of the identified synergies are classified as demarcation, followed by combined, under the umbrella category of concurrent synergies. When considering the ERDF demarcation, the principal funds with which it works are the EMFAF, JTF, and ESF+; in the case of combined synergies, the principal fund is the ESF+. The EMFAF and JTF work in specific sectors and intervene in ad-hoc territories to support the green transition. The ERDF interventions tend to complement these operations and act in parallel with other target groups and with different forms of support.

The ESF+ has the second-highest degree of interaction with other funds. Most of the planned synergies involving the ESF+ are combined or demarcation with the ERDF and JTF. The ERDF and ESF+ are identified as the CPR funds that complement each other the most due to the nature of the funds and the typology of potential investments. Indeed, these funds can support both tangible (ERDF) and intangible (ESF+) investments in the same project. The ESF+ mainly interacts with the JTF to ensure training and lifelong learning activities for workers living in regions transitioning from a fossil-fuel-based economy.

In the analysis by MS, Romania, Slovakia, and Spain plan to use the largest number of synergies of any type. The PAs of the former two countries envisage a preponderance of demarcation. In the Romanian PA, demarcation is principally identified between the ERDF and EMFAF, while for Slovakia, it is planned between the ERDF and JTF, followed by the ERDF and CF, and the ERDF and EMFAF. In the case of the Spanish PA, the primary type of synergy is concurrent, especially between the ERDF and ESF+.

The next step analyses the type of synergies by PO. The key findings (see Annex D2 for detailed figures) follow:

In **PO1**, the majority of interactions are classified as demarcation and are principally used in the *SME competitiveness* policy area. These are followed by combined synergies, which are prevalent in the *R&I* policy area. The ERDF appears to be the most used fund for creating both combined and demarcation interactions with other funds across all the policy areas of PO1:

- In *R&I*, it interacts with the JTF, as in the case of the Slovakian PA. The JTF is used in synergy with the ERDF to support interdisciplinary R&D&I projects focusing on new sectors by promoting cooperation through technology centres and supporting enterprises.
- In *Digital connectivity*, the ERDF interacts with the ESF+, as in the case of Italy, where the PA indicates that combined actions are implemented in synergy by both funds to promote the acquisition of digital skills for all citizens and implement digital infrastructure across the entire national territory.
- In *SME competitiveness*, the ERDF is planned for interventions with the JTF and EMFAF. In the Austrian PA, for instance, the JTF is used in synergy with the ERDF to support SME transition toward greener production and increase their competitiveness. The Portuguese PA foresees interactions between the ERDF and EMFAF. The EMFAF finances business investment projects in aquaculture and the processing and marketing of fishery and aquaculture products, while the ERDF intervenes in internationalisation projects.

In **PO2**, the majority of interactions are classified as demarcation. Once more, the ERDF is the most prominent fund, together with the CF, both for the *Green transition* and *Climate change and adaptation* policy areas:

- In *Green transition*, the ERDF principally interacts with the JTF with synergies demarcated by both the territorial area of the interventions and the nature and scope of the investment (as in the case of the Hungarian and Czech PAs). Besides the JTF, the ERDF also interacts with the EMFAF. For instance, the Irish PA indicates that the EMFAF supports increased energy efficiency and the use of renewables across the seafood sector, while the ERDF intervenes in the modernisation of the business environment and the creation of employment opportunities, particularly in renewable energy and low-carbon sectors.
- In *Climate change and adaptation*, the ERDF primarily interacts with the EMFAF, as seen in the Maltese PA. Here, both funds are planned for interventions to protect and restore marine environments and address biodiversity in line with the EU Biodiversity Strategy for 2030. The EMFAF, in particular, supports Sustainable Blue Investments to promote the growth of the blue economy and its industries, while the ERDF supports initiatives contributing to ocean missions to restore oceans and water by 2030.

In **PO3**, the majority of synergies among CPR funds are classified as demarcation. The ERDF is the most planned-to-be-used fund, primarily interacting with the CF, in particular in the transport sector. However, there is a more evident synergy with the CEF.

In **PO4**, the scenario is more varied across the different policy areas compared to the previous POs:

- In *Education training and skills*, combined synergies are prevalent. The ERDF is primarily used to delineate these interactions, especially with the ESF+. Overall, the ERDF supports infrastructural investments to improve schools, educational and recreative centres, while the ESF+ intervenes to implement operations to support personnel training in schools and employment centres to ensure children's participation in education and prevent early school leaving. An example is the Bulgarian PA, where the ERDF supports investments in educational infrastructure in synergy with ESF+ measures to support digital skills and promote educational innovation in pre-school and school education. In the Netherlands, Ireland, Romania, Latvia and Germany, there are examples of alternative synergies between ERASMUS+ and the ESF+. For instance, the Latvian PA notes that ESF+ investments in educational activities will also provide synergies with ERASMUS+ and may include the possibility of financing those projects using the SoE option.
- As for the *Employment and labour market* domain, most PAs envisage using demarcation to implement operations. The ESF+ appears to be the primary fund for creating such synergies, mainly with the JTF. The JTF is, in fact, utilised to support the relocation to new sectors of workers whose careers have been impacted by the transition from the fossil-fuel-based economy toward greener production and management by promoting upskilling, reskilling and active inclusion measures for these workers. For instance, the French PA specifies that the JTF supports the socio-economic transition of those territories most impacted by the transition to climate neutrality and that the ESF+ (and ERDF) act in synergy in relation to such interventions.
- Regarding the *Access to social services* area, combined synergy is the most common form of synergy detailed in the PAs. The ERDF is the most frequently used fund for creating these synergies, especially with the ESF+. For instance, the Italian PA intends to use the ERDF in combination with the ESF+ to consolidate an adequate and accessible system of social protection and social inclusion across its territory for all

citizens. Additionally, there are interventions involving both the ESF+ and ERDF to support women at risk of discrimination, victims of violence and women facing other situations of fragility. The Italian PA also mentions interactions between the ERDF and ESF+ in relation to the 'Housing First' and 'Housing Led' measures in favour of people in a state of vulnerability, where the ERDF finances structural interventions.

- Combined synergies are prioritised within the policy area addressing *Access to the health care system*. The ERDF is the main fund deployed to create synergies in this policy area, principally with the ESF+. While the ERDF is generally used to upgrade the materials and equipment of hospitals and healthcare infrastructures, the ESF+ can be used to improve the quality of healthcare services by providing training and life-long learning opportunities to healthcare personnel. The *Integration of third-country nationals* is the only policy area where sequential synergy is the most common form. The main fund is the ESF+, which is used in sequential synergy with the AMIF by the majority of PAs. The AMIF provides first-entry assistance to asylum seekers and refugees, while the ESF+ supports them in entering the labour market, accessing social services and health care, and accessing training.

In **PO5**, the majority of synergies are classified as demarcation, with the ERDF being the principal fund creating them. In implementing interventions in urban and local development, the ERDF mainly interacts with the EMFAF and EAFRD for blue and green economy strategies. The ERDF also supports integrated territorial development interventions in synergy with the ESF+, as seen in the Lithuanian PA.

More detailed findings were obtained through the analysis at the **PR level**. The prevalence of interactions favouring synergies between funds is reported in the table below and was obtained by calculating the number of identified synergies in all programme documents funded by the CPR fund (rows) with the corresponding fund listed in the columns ⁽⁶⁵⁾. The first part of the table also considers multi-fund programmes ⁽⁶⁶⁾. Moreover, it includes synergies between the HOME funds and EMFAF, which are the same in both parts of the table as these funds never finance multi-fund programmes.

Table 17. The synergy between CPR funds

Considering multi-fund programmes-	Synergy with	ERDF	ESF+	CF	JTF	EMFAF	AMIF	ISF	BMVI
	ERDF		62%	11%	17%	26%	3%	5%	2%
	ESF+	58%		1%	15%	8%	38%	-	-
	CF	52%	9%		17%	9%	-	-	-
	JTF	62%	58%	9%		4%	-	-	-
	EMFAF	60%	48%	28%	16%		-	-	4%
	AMIF	42%	81%	4%	-	-		31%	38%
	ISF	31%	23%	-	-	4%	46%		50%
	BMVI	23%	15%	4%	-	12%	46%	54%	
Without multi-fund programmes	Synergy with	ERDF	ESF+	CF	JTF	EMFAF	AMIF	ISF	BMVI
	ERDF		72%	8%	16%	26%	3%	5%	2%
	ESF+	80%		1%	14%	8%	38%	-	-

⁽⁶⁵⁾ The values in the table are obtained by calculating the number of identified synergies in all programme documents funded by each CPR fund (rows) with the corresponding fund listed in the column. The values are then divided by the total number of programmes funded by the CPR fund to obtain the ratio of synergies per programme. For instance, when considering all the ESF+ programmes that were analysed, it was found that 58% of them demonstrate some form of synergy with the programmes funded by the ERDF fund. The table in question does not exhibit a mirrored pattern along the diagonal due to the utilisation of information derived from different documents. For instance, programmes funded by the ERDF may provide more detailed information about interactions with the ESF+, whereas the ESF+-financed programmes may not specify said interactions with the same level of detail.

⁽⁶⁶⁾ This means that if interactions mentioned between the ERDF and ESF+ are mentioned in a multi-fund programme document financed by both funds, said interactions are considered relevant and included in the analysis. This approach allows for the consideration of interactions between different CPR funds mentioned within the same multi-fund programme that manages resources for a specific area.

	CF	75%	12%		7%	9%	-	-	-
	JTF	71%	80%	3%		4%	-	-	-
	EMFAF	60%	48%	28%	16%		-	-	4%
	AMIF	42%	81%	4%	-	-		31%	38%
	ISF	31%	23%	-	-	4%	46%		50%
	BMVI	23%	15%	4%	-	12%	46%	54%	

Source: Consortium elaboration based on survey data (sample: 249).

From the table above, several noteworthy details emerge:

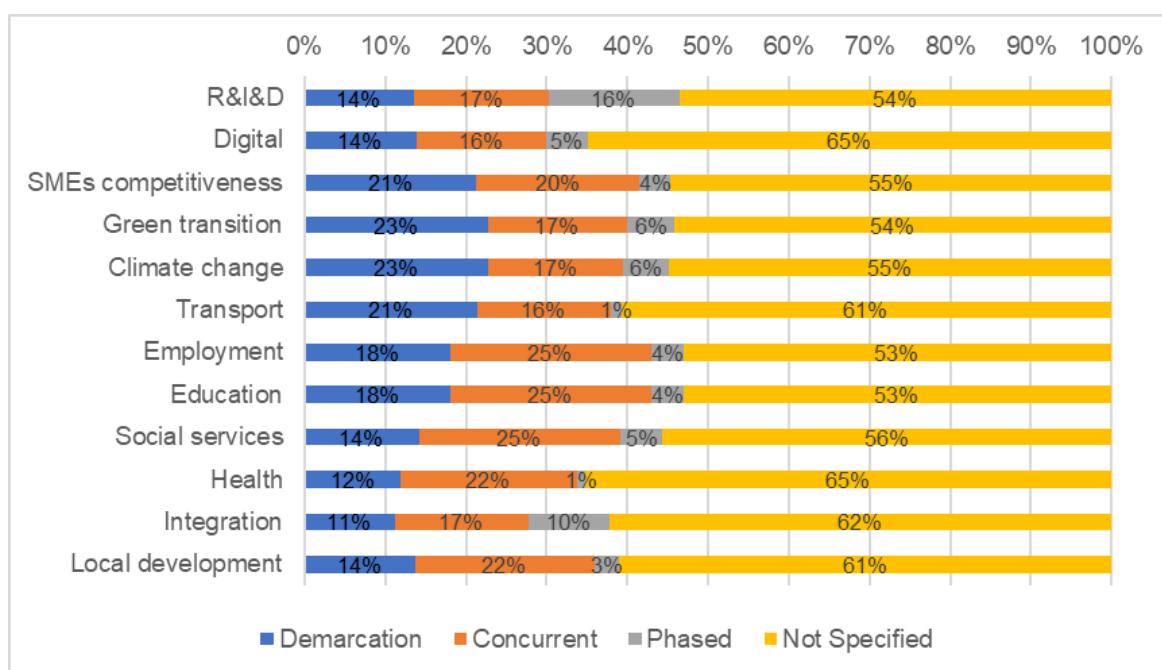
- The ERDF and ESF+ programmes exhibit significant synergies, both in the case of multi-fund and mono-fund programmes. However, the percentage of synergies tends to be higher in mono-fund programmes. This is because more explicit synergies are outlined in mono-fund programmes, while they are often implicit in multi-fund programme documents.
- Synergies between the ESF+ and AMIF are also significant because these funds cover similar policy areas related to migration and integration investments.
- The CF programmes predominantly have synergies with the ERDF, indicating a strong correlation between these two funds in terms of common policy areas and objectives. As in the case of synergies between mono-fund ERDF and ESF+ programmes, the mono-fund CF programmes present a higher percentage of synergies with the ERDF programmes, as they spell out the synergy mechanisms.
- The JTF programmes are closely associated with the ERDF and ESF+, primarily due to the nature of the topics they address and their alignment with the objectives of these funds.
- As previously mentioned, the EMFAF shows thematic alignment in particular with the ERDF and ESF+.
- The programmes that receive support from the HOME funds (AMIF, ISF, and BMVI) show significant synergies with each other, as well as with the ERDF and ESF+.

With the exception of Cyprus, Denmark, and Hungary, it is noteworthy that in all the other MSs, at least half of the programmes of a certain fund exhibit some form of synergy with programmes supported by another fund. Three MSs, Estonia, Latvia, and Sweden, cite synergies in all their programmes. Overall, 19 MSs have over 70% of their programmes indicating some form of synergy ⁽⁶⁷⁾ (see the map in Annex D2 for detail).

The figure below provides a detailed breakdown of the prevalent types of synergies based on the policy areas they cover. Each row in the figure represents the percentage of synergies falling into the different macro categories: D (demarcation), C (concurrent), P (phased), and NS (not specified). The analysis reveals that across all policy areas, there is a clear predominance of 'NS' (not specified) synergies. This indicates that most of the analysed programmes do not provide detailed information on the type of synergies identified within the policy area.

⁽⁶⁷⁾ The calculation is based on the percentage of programmes within each MS that demonstrate any form of synergy, considering the total number of programmes analysed in that specific MS. It is important to note that this map does not consider the distinctions between funds or the specific types of synergy. Instead, it offers a broad overview of the data, providing a general understanding of the level of synergy across different MSs

Figure 6. Percentage distribution of the types of synergies by policy area



Source: Consortium elaboration based on survey data (sample 536)

Excluding NS synergies, concurrent synergies emerge as the most frequently used form in various policy areas. Most of the concurrent synergies identified can be classified as combined. Education, employment, and access to social services stand out as the domains where concurrent synergies are most extensively utilised. In contrast, demarcation synergies are prevalent in transport, climate change and adaptation, green transition, and SME competitiveness. Phased synergy is the least prevalent form, as it is only identified in R&D&I and the integration of third-country nationals. This pattern is partially attributed to the SoE, the quality label recognised by the EC and classified as alternative by the study team. In the integration of third-country nationals, the preference for sequential synergies is primarily a result of the nature of the interactions between the ESF+ and the AMIF, which usually intervene sequentially to sustain the integration of third-country nationals.

The next step of the analysis considers the number of synergies identified between funds. The tables below highlight the most commonly observed synergy types in green. The absolute values of the interactions observed are less relevant in the comparison between CPR funds, as these greatly depend on the number of programmes approved for each fund and the number of policy areas covered. Therefore, the focus should be on the type of synergies and their prevalence rather than the specific quantities.

Table 18 presents the synergies among CPR funds, excluding the HOME funds.

Table 18. Types of synergy among CPR funds.

<i>With ERDF</i>	<i>Demarcation</i>	<i>Concurrent</i>	<i>Phased</i>	<i>NS</i>
ESF+	35	84	11	94
CF	7	11	1	3
JTF	25	19	2	51
EMFAF	7	7	2	18
AMIF	1	2	3	9
ISF	3	4	0	7
BMVI	2	1	0	5

<i>With CF</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>
ERDF	6	15	0	13
ESF+	0	2	0	0
JTF	1	2	0	2
EMFAF	2	5	0	4
AMIF	0	0	1	0
ISF	0	0	0	0
BMVI	0	0	0	1
<i>With ESF+</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>
ERDF	39	132	13	136
CF	0	1	0	0
JTF	14	16	1	24
EMFAF	3	3	2	7
AMIF	8	15	5	9
ISF	0	1	0	6
BMVI	0	0	0	5
<i>With JTF</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>
ERDF	26	15	4	38
ESF+	15	7	0	12
CF	2	1	0	1
EMFAF	0	0	0	6
AMIF	0	0	0	0
ISF	0	0	0	0
BMVI	0	0	0	0
<i>With EMFAF</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>
ERDF	27	13	2	88
ESF+	6	3	0	23
CF	1	0	0	3
JTF	0	0	0	2
AMIF	0	0	0	0
ISF	0	0	0	1
BMVI	0	1	0	0

Source: Consortium elaboration based on survey data

Table 19 illustrates synergies between the CPR funds and the HOME funds (AMIF, BMVI and ISF).

Table 19. Types of synergy among the CPR funds and the HOME funds (AMIF, BMVI and ISF).

	AMIF				BMVI				ISF			
<i>TYPE</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>	<i>D</i>	<i>C</i>	<i>P</i>	<i>NS</i>
ERDF	0	0	0	6	0	2	0	0	3	5	0	2
ESF+	14	19	15	39	0	0	0	0	0	0	0	0
CF	0	0	0	0	0	0	0	0	0	0	0	0
JTF	0	0	0	0	0	0	0	0	0	0	0	0
EMFAF	0	0	0	0	0	0	0	0	0	0	0	0
AMIF					2	1	1	10	0	1	1	9

ISF	1	0	2	8	5	2	1	10				
BMVI	2	3	2	7					3	9	0	10

Source: Consortium elaboration based on survey data

Legend: D: Demarcation, C: Concurrent, P: Phased; NS: Not Specified

The analysis reveals that:

The most commonly used synergies with the **ERDF** are either concurrent or demarcation, the former being especially found in conjunction with the ESF+. This often occurs when the ERDF focuses on infrastructure-related components while the ESF+ manages funds related to human resources. The prevalence of concurrent synergies also holds when considering the synergies between CPR funds and the CF. In some cases, there is also the presence of demarcation.

CPR funds primarily interact concurrently with the **ESF+**, except the BMVI, which is mostly cited without including details (NS). Notably, more than half of the AMIF programmes examined presented examples of concurrent synergies with the ESF+.

In terms of synergies between the **JTF** and the CPR funds, only the HOME programmes do not include any interactions or synergies with the JTF. Among the interactions observed with other CPR funds, the majority are demarcation since the JTF focuses explicitly on selected regions or areas and often outlines measures to ensure clear demarcation between interventions to prevent overlap or duplication of efforts.

Lastly, the prevalence of demarcation in the **EMFAF** and its interactions in particular with the ERDF followed by ESF+ can be observed.

In terms of the **HOME** funds, synergies with the CPR funds are limited, but a greater emphasis on concurrent synergy is observed. The interactions between the ESF+ and AMIF stand out as the two funds exhibit all types of synergies. This observation is particularly significant considering the substantial number of synergies compared to the total number of AMIF programmes approved by the MSs. Furthermore, the distribution of synergies across the different types appears to be relatively balanced, indicating comprehensive and multifaceted interaction between the ESF+ and AMIF. This broad range of synergies between the ESF+ and AMIF also reflects the shared policy areas and objectives the two funds address, particularly regarding migration and integration.

3.1.2. Synergies and demarcation mechanisms envisaged in the CPR programmes

This section presents the mechanisms to implement synergies as described in the CPR programme documents and during the interviews conducted with the representatives of the MAs of the selected programmes.

The analysis presented in the section above reveals that synergies are predominantly observed between the **ERDF** and **ESF+**. The most commonly observed synergies among these two funds are concurrent and demarcation. Regarding the former, the ERDF typically funds the procurement of equipment or supports the renovation or construction of facilities, while the ESF+ invests in enhancing human capital through training programmes. A detailed example of combined synergies is detected in the Polish regional programme European Funds for Dolny Śląsk 2021-2027, supported by the ERDF, ESF+ and JTF. The programme envisages the combined deployment of these funds in the ITI framework. Specifically, in SO 5.1, ITI will be used to support the elaboration and implementation of spatial strategies, thereby promoting the sustainable development of urban areas through the ERDF and ESF+. Details are in Annex G2.

Synergies intended as demarcation are generally based on the principle that ERDF support usually encompasses a higher financial dimension than the ESF+.

Box 14. Examples of combined synergies

In the 2021-2027 Innovation and skills programme in **Finland** (ERDF/ESF+/JTF), the ERDF measures prioritise promoting R&D&I activities, digitisation and the growth and competitiveness of SMEs, mainly supporting green growth and internationalisation. ERDF actions are also aimed at energy efficiency, reducing greenhouse emissions, adapting to climate change, and promoting the circular economy. The ESF+ comprehensively manages the province's employment and retraining activities (including gender equality), considering the needs of special target groups (i.e., the undereducated, vulnerable, and immigrants). It is possible to combine multidisciplinary welfare, social, health and rehabilitation services into an individual's service path. In this way, employment is supported, and marginalisation is prevented. Moreover, ERDF funds are primarily used to strengthen the prerequisites for companies' global competitiveness and exports. In turn, JTF funds are used to create local sustainable solutions that generate new skills and employment opportunities for the region. The ESF+ is directed at a wider target group with measures to improve skills and promote employment. The JTF funds, on the other hand, can be used for rapid competence-enhancing measures that are tailored to the needs of a narrower target group.

The ERDF PR 'Competitiveness and Innovation in Enterprises' in **Bulgaria** shows concurrent synergies with 'The Human Resources Development Programme', financed by the ESF+, which plays a pivotal role in providing training to enhance digital skills. Moreover, both the 'Competitiveness and Innovation programme (ERDF) and the Human Resources Programme (ESF+) support individuals and startups in developing their businesses and becoming more competitive. The ESF+ focuses mostly on socially relevant, small-scale businesses, including individual enterprises, whereas the ERDF programme concentrates on financial instruments for startups, including risk investment and acceleration. This dual approach exemplifies a combined synergy, engaging two distinct programmes supported by the same fund yet targeting different groups. This synergy illustrates how distinct but related training initiatives can complement each other, fostering a more comprehensive skill development ecosystem.

Source: Consortium elaboration

The **JTF** shows synergies almost exclusively with the ESF+ and ERDF. The predominant type of synergies identified is demarcation, often based on territorial distinctions and combined when the JTF facilitates the development of green infrastructures. However, there are also examples of phased synergies.

Box 15. Examples of synergies among the JTF and the ERDF/ESF+

In the ERDF 2021-2027 West **Netherlands** Programme, the JTF supports projects relevant to both economic development (akin to the ERDF objectives) and labour-market enhancement (similar to the ESF+ goals). Strategic synergies, both demarcation and concurrent (specifically, combined), are planned within regional steering groups, which facilitate integration and coordination among the ERDF, ESF+, and JTF initiatives. Specifically, the JTF is focused on facilitating the industrial transition in select industrial areas of the West Netherlands. Concurrently, the ERDF is geared towards supporting the broader transition of companies in the region.

The Peloponnese ERDF/ESF+ Programme in **Greece** foresees phased synergies with the JTF. The Programme supports sustainable transportation, particularly electric charging points and the supply of electric vehicles. Such initiatives are poised for promotion through pilot applications in JTF-designated intervention areas. The PR includes these actions by complementing existing CLLD projects financed by ERDF/ESF+ interventions. By focusing on green infrastructure, the JTF enhances the region's broader development objectives under the ERDF and ESF+, thereby fostering a sustainable and integrated approach to regional development.

Source: Consortium elaboration

The **EMFAF** presents synergies mainly with the ERDF and, to a lesser extent, with the ESF+ and CF. Most of the identified synergies are demarcation, grounded in differentiating the EMFAF operations from other funds in terms of sector and target groups, such as fishing and fishermen.

Box 16. Synergies between EMFAF and ESF+

The 2021-2027 EMFAF Programme in **Spain** focuses on supporting innovation. Companies involved in the development of new projects or technologies related to fisheries are eligible for support. Moreover, although the EMFAF management is centralised, its territorial scope encompasses all Spanish regions, necessitating comprehensive communication channels for effective coordination. The established rule for differentiating between various funds stipulates that any operation connected to the fisheries sector, especially those benefiting sector stakeholders, should primarily be funded by the EMFAF. The EMFAF demarcates its area of intervention with the ESF+ as follows: it supports training for workers active in the fisheries sector who cannot access the ESF+-supported training, while the ESF+ programme funds management and business strategy training.

Source: Consortium elaboration

The **CF**-supported interventions predominantly have synergies with ERDF-funded projects, indicating a strong correlation between these two funds in terms of common policy areas and objectives. The main policy areas where synergies are envisaged are related to green transition, climate change and transport. Generally, the programmes do not clearly define the mechanisms to carry out the synergies but merely refer to both funds.

In terms of the **HOME** funds, very few synergies with other Cohesion Policy funds are observed, mainly with the ESF+ and, to a minor extent, with the ERDF. These synergies are mostly concurrent. The AMIF is the primary fund with synergies with the ESF+, frequently including phased synergies. Phased synergies occur when the AMIF supports asylum seekers until they are settled and have access to the labour market. As potential participants in the labour market, they then become eligible for the ESF+ measures.

Box 17. Synergies between ESF+ and AMIF

In the 2021-2027 Investment in the Future Programme in **Luxembourg**, supported by the ESF+/JTF, synergies are observed between the AMIF and ESF+, which support operations for migrants at distinct stages. The AMIF engages with the target group upon their initial arrival in the country, whereas the ESF+ is activated once they have settled.

In **Cyprus**, the national AMIF programme collaborates in funding projects alongside other funds, with notable interactions primarily occurring between the ESF+ and AMIF. Adequate demarcation and mechanisms are in place to facilitate these synergies. One such mechanism enables the implementation of synergies, particularly evident in the provision of Greek language lessons for minors, supported by both the AMIF and ESF+. This measure was developed in the previous programming period, and given the positive results, it was decided to continue its implementation in 2021-2027. The Ministry of Education plays a critical role in managing this overlap by coordinating the two projects to offer courses at different schools, for diverse student groups, and at varied times, thereby addressing a comprehensive range of language integration needs. The AMIF supports training and Greek lessons for adults and minors with migrant backgrounds. ESF+ supports complementary training to cover additional migration needs. The geographical coverage of training provided by the AMIF and ESF+ is also different. More details on this can be found in the fiche dedicated to the AMIF Cyprus national programme in Annex G2.

Moreover, the HOME funds show synergies with each other. As highlighted by the interviews, the HOME funds are intrinsically related not only by the policy framework but also from an organisational perspective, which is why most synergies occur among them. The HOME programmes, in fact, often share the same MA. As per the documental analysis, 19 MSs have a single MA in charge of managing and implementing the HOME funds. In some cases, for instance in Poland or Romania, the AMIF, BMVI and ISF also share the same MC. During the interview with the Polish director of the Department of European Funds and the head of the unit in the Department of European Funds, it was revealed that 'the AMIF, ISF, BMVI have the same MA and the same MC; therefore, cooperation in the implementation of these funds is very high and effective.' The Romanian AMIF programme representative noted a 'maximum level of coordination between the three programmes [AMIF, BMVI, ISF] as they have a common MC'.

Box 18. Synergies among HOME funds

In **Finland's** 2021-2027 ISF Programme, demarcation and coordination with the AMIF occur naturally. The Programme was developed by the same preparation team managing both programmes, which assisted from the outset in designing synergies and, more broadly, avoiding overlap. This close cooperation is maintained during the implementation phase. For instance, if the Finnish AMIF Programme receives an application that does not match the eligibility criteria or does not fit perfectly with the Programme's objectives, the application is directed to the ISF, which proceeds with the evaluation if appropriate.

Source: Consortium elaboration

Finally, the interviews revealed that the nature of the programme, particularly in multi-fund programmes, is a primary driver of synergies. Authorities frequently underscore that synergies are inherently embedded within these programmes and emphasise the crucial role of the programming phase. During this phase, it is a natural course of action to delineate which operations will be supported by which fund, thus facilitating their coordinated implementation. This simultaneous programming ensures a robust framework for avoiding overlap, enabling the design of more sophisticated types of synergies, such as sequential or combined synergies, as opposed to demarcation. Moreover, in this context, it is noteworthy that some MAs perceive synergies as integral to the programme framework and dedicate time and resources not only to programming but also to subsequent activities such as capacity building and the development of specific guidance materials.

Box 19. Synergies in the multi-fund programmes

In **Slovakia's** multi-fund programme (ERDF, ESF+, CF, JTF), demarcation between the JTF and ERDF is achieved through territorial delineation. This is articulated in the TJTP, which explicitly defines the JTF interventions and their territorial focus. These programmes support investments that synergistically and complementarily contribute to the transition towards a greener, low-carbon economy, as outlined under PO2. The JTF is designed to bolster the ERDF measures targeting SMEs, productive investment, and the development of micro-enterprises, particularly in emerging sectors. Furthermore, the JTF places a significant emphasis on skill acquisition and the enhancement of existing skills, especially in the context of industrial transformation and enterprises located in transition territories. This includes support for vocational education and training. Additionally, the JTF extends its support to activities focused on green technologies and innovation, aligning with the overarching objective of facilitating a sustainable and environmentally conscious economic transition.

Source: Consortium elaboration

3.2. Synergies and demarcation between CPR funds and EU funds and instruments

This section illustrates the intensity and typology of synergies detected between the CPR funds and the EU funds and instruments, as well as the mechanisms envisaged to implement these synergistic interventions at the operational level. Specifically, the first subsection investigates the intensity of synergies and identifies which CPR funds envisage synergies with EU funds and instruments, highlighting the main types of planned synergies. The following two subsections describe the mechanisms for implementing synergies with the CPR programmes as outlined in the EU funds and the methods for achieving synergies with EU funds and instruments detected in the CPR programmes.

3.2.1. Intensity of synergies and demarcation between CPR funds and EU funds and instruments

At the PA level, the ERDF is the primary fund interacting with all EU funds and instruments, with the exception of the EGF. These synergies are mainly in terms of demarcation, particularly with the EAFRD. The ESF+ also interacts with the EAFRD and ERASMUS+,

but these synergies are predominantly characterised as concurrent. More details are discussed at the PO level.

In **PO1**, HE is the primary instrument planned with the ERDF through alternative synergies in the *R&I* policy area. Examples include the Bulgarian PA, which mentions synergies between HE and the ERDF to support projects having received the SoE certificate and/or having passed the evaluation threshold. In *digital connectivity*, the ESF+ also works with the DEP to implement combined actions. Here, the ESF+ plays an essential role in funding training and the acquisition of skills for the digital sector for students, workers and unemployed people. In the Spanish PA, there is a case of alternative synergy, with the SoE, between the ERDF and CEF in the area of digital connectivity infrastructures to support projects of common interest in the deployment of and access to secure, very high-capacity digital networks, including 5G systems. In the event that an intervention bearing the SoE cannot be supported by the CEF due to limited funding, it may be funded by the ERDF.

In **PO2**, the ERDF is mainly used for interventions in conjunction with the EAFRD through demarcation, albeit less significantly compared to 2014-2020. For instance, the Croatian PA intends to use the EAFRD for investments in the agricultural sector aimed at adapting to climate change, such as equipment against hail, frost and the like. The ERDF will support measures to strengthen the system for monitoring and assessing climate change, as well as activities to manage the risks of floods, forest fires and open fires (especially in assisted areas), earthquakes, and reducing water pollution. There are also two cases of alternative synergies between LIFE and the ERDF, using the SoE mentioned in the Spanish and Slovenian PAs.

In **PO3**, in several PAs, the ERDF and CF work together with the CEF. Synergies between the ERDF and CEF are mostly classified as concurrent. The Slovenian PA, for instance, intends to use the CEF to develop infrastructure networks, help address market failures, and stimulate further public and private sector investment, while the CF intervenes in the development of the Trans-European Transport Network (TEN-T) (both the core and comprehensive networks). The Croatian PA plans to finance preliminary studies for investments in basic and comprehensive TEN-T networks through the CEF, while interventions for infrastructure other than the RRF utilise the CF.

In **PO4**, for the *Education training and skills* policy area, concurrent synergies, often in the form of combined synergies, are mainly seen between the ESF+ and ERASMUS+, as described in the Swedish PA. These synergies include promoting educational mobility for pupils with fewer opportunities, participation in volunteering activities, strategic partnerships, youth exchanges and skills development for people working with young people. Combined synergies also represent the main form of interaction for *access to health care systems*, especially between the EU4HEALTH programme and the ERDF, as seen in the Polish and Romanian PAs or with the ESF+, as in the case of Finland.

Finally, in **PO5**, planned demarcation is most common, particularly between the ERDF and EAFRD.


Additional findings were derived from the analysis at the **PR level**. The table below provides an overview of the synergies between the various CPR programmes and the EU funds and instruments, calculated following the same methodology as for the CPR funds in section 3.1.1⁽⁶⁸⁾. The identified synergies are generally lower compared to those among CPR funds alone.

⁶⁸ The values are generated by calculating the number of identified synergies in all programme documents funded by each CPR fund (rows) with the corresponding fund listed in the column. This value is then divided by the total number of programmes funded by the CPR fund to obtain the ratio of synergies per programme. For instance, when considering all the ESF+ programmes that were analysed, it was found that 39% of them demonstrate some form of synergy with ERASMUS+.

Moreover:

- When examining the ERDF programmes, synergies are especially found with HE due to the shared focus on R&D&I and digitalisation. The ERDF also demonstrates noteworthy synergies with other EU funds and instruments, such as the EAFRD, DEP, and LIFE.
- Conversely, the ESF+ programmes exhibit fewer synergies with EU funds and instruments. The most significant of these are with ERASMUS+, given the common policy area of education, training, and skills.
- CF programmes show limited synergies with EU funds and instruments, except for the CEF. Both support investments in sustainable infrastructure in the green transition and transport sectors.
- JTF programmes showcase more extensive synergies with HE and LIFE.
- The EMFAF fund exhibits significant synergies, particularly with EU funds and instruments addressing environmental issues, such as the EAFRD and LIFE, as well as with HE, which offers opportunities for innovation in the fisheries sector.
- The programmes supported by the HOME funds have limited synergies with EU funds and instruments, except for HE, which has synergies with the ISF and BMVI.

Table 20. Synergies between the CPR fund programmes and EU funds and instruments

Synergy with 	TSI	EAFRD	Horizon Europe	CEF	DEP	InvestEU Fund	LIFE	EU4Health	EGF	Erasmus+
ERDF	1%	36%	71%	23%	39%	8%	37%	5%	1%	17%
ESF+	3%	14%	14%	6%	13%	1%	7%	5%	0%	39%
CF	4%	9%	9%	35%	4%	4%	26%	0%	0%	0%
JTF	4%	9%	31%	9%	7%	9%	31%	0%	2%	4%
EMFAF	0%	40%	84%	16%	16%	0%	40%	0%	0%	8%
AMIF	8%	0%	0%	0%	0%	0%	0%	0%	0%	12%
ISF	0%	0%	27%	0%	8%	0%	0%	0%	0%	8%
BMVI	0%	0%	23%	0%	4%	0%	0%	0%	0%	0%

Source: Consortium elaboration based on survey data (sample 536)

The distribution of the type of synergy between CPR funds and EU funds and instruments is displayed in the following table, with the predominant type of synergy for each fund highlighted in green. The findings reveal that synergy patterns vary significantly across CPR funds and EU funds and instruments. As previously observed in section 3.1.1, the most prevalent type of interaction between most CPR funds and EU funds and instruments is 'NS', indicating that programmes acknowledge the potential for synergies but do not provide specific details on how they can be implemented.

Table 21. Types of synergy among CPR funds and EU Funds and Instruments

	TSI				EAFRD				HE				CEF				EGF			
TYPE	D	C	P	NS	D	C	P	NS	D	C	P	NS	D	C	P	NS	D	C	P	NS
ERDF	0	0	2	2	8	1	1	84	5	36	61	10	9	1	2	35	0	0	0	1
ESF+	1	5	1	1	7	5	1	43	4	4	0	33	1	0	2	9	0	0	0	0
CF	0	0	0	1	0	0	0	2	0	0	0	2	3	1	0	5	0	0	0	0

JTF	0	0	2	0	1	1	0	6	2	0	1	25	0	1	1	3	1 2	0	0	1
EMFA F	0	0	0	0	5	7	0	5	1	8	3	20	0	0	2	2	0	0	0	
AMIF	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
ISF	0	0	0	0	0	0	0	0	0	1	8	0	0	0	0	0	0	0	0	
BMVI	0	0	0	0	0	0	0	0	0	1	0	4	0	0	0	0	0	0	0	
	InvestEU				LIFE				EU4Health Programme				DEP				Erasmus+			
TYPE	D	C	P	NS	D	C	P	NS	D	C	P	NS	D	C	P	NS	D	C	P	N S
ERDF	0	4	1	18	3	1 3	1 4	76	0	0	1	7	3	1 8	8	68	1	5	1	33
ESF+	0	0	0	0	0	0	0	36	0	1	0	6	0	2	5	33	9	1 3	5	58
CF	0	0	0	0	0	1	2	3	0	0	0	0	0	0	0	1	0	0	0	0
JTF	0	1	0	8	0	1	3	14	0	0	0	0	0	0	0	3	0	0	0	3
EMFAF	0	0	0	0	1	5	1	7	0	0	0	0	0	3	0	7	0	0	0	3
AMIF	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3
ISF	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	2	0	0	0	2
BMVI	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation, NS: not specified.

3.2.2. Synergies and demarcation mechanisms envisaged in the EU funds and instruments toward the CPR funds

This section describes the mechanisms for implementing synergies as presented in the EU funds and instruments WP.

At the **level of EU funds and instruments**, the macro-category of concurrent synergies is the most prevalent type of synergy identified. In particular, cumulative synergy emerges as a viable option for most EU funds. This typology is specific to synergies with CPR funds and some EU funds and instruments, such as HE, ERASMUS+, DEP, LIFE and EU4HEALTH. Cumulative funding allows support for the same project/operation with funding from two different sources of the Union budget, provided that the funding does not cover the same cost. This can include both shared and directly managed funds, but it is not an automatic process. It is up to the MAs of the CPR programme and the granting authority for directly managed EU programmes to explore this option. If specific arrangements are made to ensure compliance with Article 63(9) CPR and 191(3) of the Financial Regulation, cumulative funding between direct and shared management funds is possible for the same operation. Specific forms of combined synergies are described here below.

Box 20. Examples of synergies between CPR funds and EU funds and instruments foreseen in the EU funds and instruments documents

EAFRD	LEADER is probably the most interesting case of a combination synergy between the EAFRD and Cohesion Policy funds. Besides being a governance bottom-up arrangement (see Chapter 2), LEADER is implemented under the EAFRD and serves as a catalyst for additional funding by leveraging resources from other Cohesion Policy funds, such as the ERDF and the ESF+. This allows LEADER to further support rural communities in achieving their development objectives while maximising the impact of available EU funding.
HE	Another combination synergy available under HE is the teaming action, which facilitates the establishment or modernisation of a centre of excellence in a performing country. This is achieved by pairing the centre with a leading research institution (advanced partner) in a different country. Complementary funding from various sources, including national, regional, EU or private funding, is typically required to support this initiative. In order to qualify for this funding, the teaming project must meet the requirements set out in Article 73(4) of the CPR. Notably,

	<p>two separate calls are opened for this purpose, one for the ERDF and the other for HE. The eligible costs covered by these calls are distinct from one another.</p> <p>Besides this, HE offers various combinations for each of its WPs. For example, WP2 focuses on providing co-funding for regional, national, and international R&I programmes, while WP3, 7, and 8 emphasise the development and strengthening of regional and local research and innovation ecosystems. WP5 outlines expected complementarities for the take-up of research results and innovative solutions. WP9 includes technical assistance for bioeconomy project development and synergies with different policy instruments and funding opportunities ⁽⁶⁹⁾.</p>
DEP	<p>The Programme aims to ensure ⁽⁷⁰⁾ combination synergies with the ERDF, ESF+, and CF to support actions that bridge policy areas within the S3 strategies, strengthen regional and local innovation ecosystems, facilitate industrial transformation, and enable the digital transformation of society and public administrations. Additionally, the DEP complements and supports the transnational networking and mapping of digital capacities to make them available to SMEs and ensure that interoperable IT solutions are accessible in all Union regions.</p>
EGF	<p>The ESF+ is the primary EU instrument for promoting employment, while the EGF aims to increase employability and facilitate reintegration, making the two programmes complementary. The activity report ⁽⁷¹⁾ outlines how these programmes can interact to create synergies. The EGF provides targeted support to individuals in response to specific and large-scale mass redundancies occurring within a short period, offering personalised services beyond standard courses and actions. In contrast, the ESF+ typically targets support to a broader population and supports strategic long-term goals through multi-annual programmes. An example of how these programmes can interact to create synergies is the use of EGF activities to offer different or additional measures to existing ESF+ measures. This enables MSs to tailor their assistance to beneficiaries and provide more personalised support.</p>

Source: Consortium elaboration

In the macro-category phased synergy, alternative synergies mainly refer to the SoE. If the HE proposed actions align with the goals and regulations of a Cohesion Policy relevant fund, they may be eligible for support from the ERDF and ESF+ under Article 73(4) of the CPR without requiring any additional evaluation. The SoE is intended to recognise the excellent quality of the proposal and to enhance its chances of obtaining funding from other sources. The SoE is not a grant and does not come with any financial support. However, it can be considered ‘phased’ in the sense that it acts as a sequential step in the project selection process towards securing funding from the ERDF and/or ESF+/ERDF, as it demonstrates the high quality and potential impact of the proposed project, increasing the chances of obtaining funding from these programmes. The SoE can be identified between the ERDF and ESF+ and HE, CEF, DEP, LIFE and ERASMUS+.

Box 21. Example of phased synergies with DEP and HE

HE	<p>HE codifies specific types of synergies in the ‘upstream and downstream’ stages of the research and innovation (R&D&I) process that can arise through coordinated EU support, primarily from HE and the ERDF programmes. These synergies cover all stages of the R&I process, from capacity-building and basic research to the adoption of innovative solutions by private enterprises. These synergies are especially valuable when they align with key EU policy objectives and have the potential to make significant contributions to the broader economy.</p> <p>Besides this, HE offers a wide range of combinations for each of its WP. For example, WP6 seeks phased synergies between HE and the ERDF to manage disaster risks, adapt to climate change, and protect public spaces and utilities. WP11 addresses phased synergies between HE and the Cohesion Policy programmes, including pathways for human resources</p>
-----------	--

⁽⁶⁹⁾ Commission Notice (2022/C 421/03) on Synergies between Horizon Europe and ERDF programmes.

⁽⁷⁰⁾ ANNEX III - Synergies with other union programmes of the DEP establishing Regulation.

⁽⁷¹⁾ Report from the commission to the European Parliament and the Council on the activities of EGF in 2019 and 2020.

	development, internationalisation, valorisation, and the upscaling of research results towards marketable solutions ⁽⁷²⁾ .
DEP	Effective implementation of the DEP relies on phased interactions. In this process, the DEP provides support to national authorities in preparing and implementing Union funds and programmes, with an emphasis on boosting their administrative capacity to optimally and promptly utilise these resources. Such interactions are critical to ensuring project continuity and maximising their impact. These interactions are particularly evident in strategic and working plans, especially with funds such as the ERDF, ESF+, and CF.

Source: Consortium elaboration

Demarcation is primarily applied to prevent duplication or, even worse, double funding rather than to establish active integration. However, although Article 11(1) cites demarcation as one of the elements to be taken into account when elaborating the PA, it does not have a legal basis in the CPR and is not specifically tailored to Cohesion Policy funds. For instance, the EAFRD mandates MSs to ensure that EAFRD-funded expenditures do not receive any additional financing from the Union budget and to provide an overview of how coordination, demarcation, and complementarities are managed between the EAFRD and other Union funds operating in rural areas, as part of the EAFRD Strategic Plans without explicit mention of Cohesion Policy⁽⁷³⁾.

3.2.3. Synergies and demarcation mechanisms envisaged in the CPR programmes with the EU funds and instruments

The following paragraphs describe the mechanisms for implementing synergies between the EU funds and instruments and the CPR funds from the CPR programme perspective. In fact, this section presents key findings from the CPR programme documental analysis, and the interviews with the MAs of selected CPR programmes.

Aside from 'NS' synergies, the ERDF programmes exhibit significant synergies with HE. These synergies are typically phased. Generally, HE focuses on the initial stages of research, while the ERDF is more oriented towards market application. A specific manifestation of the phased synergy is observed in the SoE framework. In this type of synergy, defined as alternative, the phasing aspect is procedural rather than functional, with project preparation occurring under HE, while actual financing is provided by the ERDF. Concurrent synergies between the ERDF and HE are also significant.

Moreover, the interviews revealed that the S3 framework provides a conducive environment for both concurrent and phased synergies between the ERDF and HE. As per the Commission Notice 'Synergies between Horizon Europe and the ERDF programmes'⁽⁷⁴⁾, published in 2022, S3 strategies are central mechanisms for designing synergies with smart growth-related instruments at the EU level, especially with HE. S3 strategies address the need for bottom-up processes to bolster research and innovation activities in regions and territories 'focusing on areas of specialisation where they hold significant potential or competitive advantage to sustain productivity growth.' This approach reflects a place-based development strategy to support innovation, adopting multi-level governance by involving relevant stakeholders based on the area(s) of intervention. ⁽⁷⁵⁾.

⁽⁷²⁾ Commission Notice (2022/C 421/03).

⁽⁷³⁾ Art. 36 of the REG(EU) 2021/2116 on the financing, management and monitoring of CAP.

⁽⁷⁴⁾ COMMISSION NOTICE (2022/C 421/03) Synergies between Horizon Europe and ERDF programmes

⁽⁷⁵⁾ Marco Di Cotaldo, Vassilis Monastiriotis, Andrés Rodríguez-Pose (2020). How 'smart' are Smart Specialisation strategies?. LSE 'Europe in Question' Discussion Paper Series.

Box 22. Examples of alternative synergies with HE.

In the context of the Cohesion Policy Programme 'THALIA 2021-2027' in **Cyprus** - encompassing the ERDF, ESF+, CF, and JTF – the MA highlighted the significant advantage of applying synergies: the amplification of effects and outcomes. Particularly in the realm of R&D&I, cooperation with other EU countries at the EU level, notably through European Partnerships, is deemed highly pertinent. Additionally, developing administrative capacities through such collaborative efforts is considered crucial for enhancing the national R&D&I ecosystem's capabilities. Examples of alternative synergies between HE and ERDF include projects that received the SoE from HE and can later be financed by the ERDF programme, as well as Marie Curie projects that do not receive HE funding and can request ERDF financial resources.

Within the Competitiveness Programme in **Greece** (ERDF, ESF+), there are synergies with HE actions, such as the ERA Chairs and the SoE for Marie Skłodowska Curie and European Research Council actions in S3 priority areas. In this case, actions included in the corresponding HE actions are integrated into the Programme without re-evaluation. The primary focus is on determining whether the eligible costs align with the Programme's eligibility criteria, as seen in the application of the SoE.

Source: Consortium elaboration

It is interesting to note that potential synergies between the ERDF and HE have been addressed through guidelines and networks at the **EU level**, as per the previously mentioned Commission Notice⁷⁶. However, several interviewees were unaware of said notice. A key explanation concerned the fact that the notice was issued once the programmes had already been elaborated. Moreover, some respondents suggested that training on this topic would have been more beneficial than guidelines. Also, despite recognising that the Notice can provide a better overview of working modalities to design potential synergies, it lacks details for exceptional situations. Some respondents also declared that synergies at the project level should be explored at a later stage, namely from the call for projects designing phase.

Additional support at the EU level comes from the RIMA network (⁷⁷) created in June 2023 under the European Research Area (ERA) Forum to support synergies with HE. The network is jointly chaired by DG RTD, DG REGIO and a Member State (Czech Republic) and includes Member State Authorities responsible for R&D&I and Cohesion Policy programmes. The platform aims to foster and support coordination between the EC and Member States to ensure synergies across all relevant funding sources and boost scientific and innovation excellence throughout Europe, which is one of the priority areas of ERA. According to the interviews, RIMA is considered very helpful and supportive in encouraging synergies and addressing the technical challenges arising from the application of synergies between HE and the ERDF.

At the **national** level, some MSs created ad hoc agencies or organisations in charge of delineating the synergies between HE and the CPR programmes and supporting potential beneficiaries in applying for HE funding.

Box 23. Example of the national agency supporting applications to HE funds.

The APRE – Agency for the Promotion of European Research - aims to support and facilitate Italian participation in the European Union's Research and Innovation (R&I) funding programmes through information services, training, and assistance. The agency has issued a manual (⁷⁸) that is continually updated for the subsequent application of synergies. This manual is aimed at regional and national programming entities and includes key legislative references to synergies in the European Union funding programs. It also features a mapping of the synergy experiences implemented in Italy with the ESIF or other resources during the 2014-2020 period. This Vademecum considers the recommendations contained within

(⁷⁶) COMMISSION NOTICE (2022/C 421/03) Synergies between Horizon Europe and ERDF programmes.

(⁷⁷) In June 2023, the EC, together with Member States Authorities responsible for R&I and cohesion policy programmes launched a new network on synergies under the ERA Forum. The group is jointly chaired by DG RTD, DG REGIO and a Member State (Czech Republic). The group provides a platform to foster and support coordination between the EC and Member States to ensure synergies across all relevant funding sources and boost scientific and innovation excellence throughout Europe, which is one of the priority areas of the European Research Area (ERA).

(⁷⁸) Source : https://apre.it/wp-content/uploads/2022/07/Vademecum_Sinergie_-Luglio-rev_11.07.22.pdf

Commission Notice (2022/C 421/03) on Synergies between HE and the ERDF programmes to facilitate the application of synergies. While the Commission notice provides an official interpretation of the EU law and its provisions relating to synergies, the APRE guide offers suggestions on the implementation of synergies and related practices.

The **LIFE** programme has both concurrent and phased synergies, mainly with the ERDF. Phased synergies are generally established in a manner akin to HE, typically following one of two patterns. In the first scenario, phased synergy is achieved when LIFE projects lay the groundwork for ERDF projects by developing models or providing capacity-building activities. Conversely, projects that do not secure direct financing from LIFE may receive funding from the ERDF. LIFE also exhibits some forms of synergies with the EMFAF, owing to their shared emphasis on eco-sustainability and environmental protection. These synergies are mainly concurrent, even if there are also approaches to phased synergy, as detailed in the box below.

Box 24. Example of synergies with the LIFE programme

The EMFAF PR of **Latvia** operates as a thematically targeted fund, which grants it a high degree of management flexibility. The fund's orientation towards cooperation and complementarity with other funds, such as LIFE, facilitates the achievement of broader objectives, leveraging its comparatively smaller size to accomplish significant impact, particularly in CLLD processes.

The EMFAF programme develops phased synergies with LIFE functioning in both upstream and downstream directions. In the upstream direction, the EMFAF programme not only supports beneficiaries in the application process but also develops the initial stage of the project. This foundational work is then leveraged by the LIFE programme to scale up efforts, drawing on the groundwork laid by the EMFAF. Conversely, in the downstream direction, the outcomes of LIFE projects are capitalised upon by the EMFAF. This means that the results and innovations achieved through LIFE initiatives are further developed, refined, or implemented through EMFAF's targeted support, ensuring a continuum of progress and impact.

The EMFAF's coverage of administrative costs enables Local Action Groups (LAGs) to secure additional resources from various funds, fostering comprehensive local development. The growing popularity of such complementarity, particularly with LIFE projects, is notable. LIFE projects intervene where there is a need for more extensive cooperation in the conservation of marine environments and resources, often operating on a larger scale. Efforts are made to minimise the administrative load of projects under the EMFAF, which are characterised by their simplicity and the absence of significant obstacles or costs. These synergies have been planned at the level of PA and PR and contribute to the national Double Financing Matrix, addressing intervention measures funded by the EMFAF.

Source: Consortium elaboration

The **EAFRD** displays significant synergies with the ERDF, primarily through demarcation, which may be geographical (e.g. outermost regions or selected regions based on the PA), financial (distinguishing between small and large projects), or based on target groups (e.g. agricultural, forestry and agri-food businesses companies). There are also examples of concurrent synergies, such as the EAFRD in conjunction with the ERDF to support circular economy models. Some forms of synergies have also been identified with the JTF.

However, despite the significant number of synergies identified in the documental analysis, some interview respondents pointed out that overall synergies have diminished compared to previous periods. For these respondents, the exclusion of the EAFRD from the CPR has hampered the elaboration of synergies, even though programme authorities still have the possibility to describe potential synergies between CPR funds and the EAFRD in the dedicated section of the PA.

Box 25. Example of synergies with EAFRD

In the ERDF 2021-2027 West **Netherlands** programme, the EAFRD plays a pivotal role in transforming the region's highly intensive farming sector. It aims to transition to a more sustainable and circular economy model. This transformation is backed by the EAFRD's financial and policy support, which seeks to incentivise and facilitate the adoption of circular practices within the agricultural industry. Concurrently, the ERDF

dedicates resources to promoting circularity within the broader business sector. This includes fostering sustainable practices across industries, with a particular focus on resource efficiency, waste reduction, and the implementation of circular business models.

In the 2021-2027 Innovation and Skill programme in **Finland** (ERDF/ESF+/JTF), the EAFRD and JTF are coordinated in relation to regional objectives. The EAFRD mainly supports business and rural economic/business structure and diversity and is especially suited to individual company support, while the JTF focuses on regional demonstration initiatives and pilot project environments with businesses and universities in the JTF-supported region. The JTF can also target regional development actions not supported by the EAFRD, such as the reuse of peatlands.

Source: Consortium elaboration

Concerning the specific synergies identified with the **DEP**, **CEF**, and **ERASMUS+**, the majority of programmes have not specified the types of synergies formed. However, when these are detailed, concurrent synergies are significant between the **DEP** and ERDF in the infrastructural and digital policy areas. These often materialise in the EDIH, as in the case of Bulgaria, where both HE and the DEP support the creation of EDIHs (see the case study in Annex G2), as well as in Sweden, France and Romania. Concurrent synergies are also identified between the ERDF and **CEF** in the digital sector. In the national Lithuanian programme (ERDF, ESF+, CF, JTF), combined synergy between the Cohesion Policy funds, the NRRPs, and CEF are envisaged for the Rail Baltica project. Under this umbrella investment, which includes several MSs in the Baltic region, Lithuania intends to support investments to strengthen digitalisation in the private and public sectors by financing 5G networks for all urban territories and on all the most relevant highways. For a more detailed description of these synergies among the ERDF, CEF and NRRPs, see Annex G2.

Concerning **ERASMUS+**, synergies are mainly with the ESF+.

Box 26. Example of concurrent synergies between the DEP and ERDF

The **French** Programme, Centre-Val de Loire and interregional Loire ERDF-ESF+ 2021-2027 plans to implement synergies between the ERDF and DEP as follows: the DEP will support large-scale projects involving a lead beneficiary and several partners. The ERDF could be used to complement DEP funding to support the operation and activities of the regional E-DIH of the "Loire Valley Data Hub for well-being and sustainability" project. In fact, the Region submitted a European project entitled "Loire Valley Data Hub for well-being and sustainability" supported by the lead beneficiary DEV'UP (along with 6 six other partner beneficiaries) as part of a call for projects (DIGITAL-2021-EDIH-01) under the DEP for a total of EUR 1.8 million. The DEP will support, in particular, the structuring of EDIHs in the region. The ERDF could intervene in addition to DEP funding to support the operation and activities of the regional E-DIH of the "Loire Valley Data Hub for well-being and sustainability" project and optimise the leverage effect of European funds. E-DIH will support the digital transformation of companies and public administrations in the exploitation and development of data, thanks to the mastery of digital technologies (artificial intelligence, cybersecurity, high-performance computing). The ERDF will intervene in smaller projects carried out by public or private beneficiaries considered SMEs, with or without a call for projects.

Box 27. Example of synergies with CEF and ERASMUS+.

In the case of the **Slovakian** multi-fund Programme (ERDF, CF, JTF, ESF+), the CEF will be employed to fortify investments in digital connectivity infrastructure, representing a sort of combined synergy vital for enhancing the digital framework to meet contemporary connectivity requirements. Furthermore, the DEP is anticipated to enhance investments in capacity building for research, development, and the application of cutting-edge technologies such as high-performance computing, quantum technologies, and AI, particularly aimed at improving public administration.

The **Czech** PR Johannes Amos Comenius (ERDF and ESF+) will finance interventions to support quality and efficient projects in education, boost equal access to education for children, pupils and students, lifelong learning, and support marginalised groups. These interventions will be complemented by ERASMUS+ funding and the NRRP. More specifically, the programme can co-finance mobilities and finance scholarships for students.

Source: Consortium elaboration

3.3. Synergies and demarcation between Cohesion Policy funds and the NRRPs

This section illustrates the intensity and typology of synergies detected between the Cohesion policy funds and the NRRPs, as well as the mechanisms envisaged to implement these synergistic interventions at the operational level. The first subsection presents the intensity of synergies and demarcation detected in the NRRPs with the Cohesion Policy funds. It also describes the procedures planned in the NRRPs to ensure synergies with Cohesion Policy funds by specifying the funds involved and the main type of synergies detected, with related examples. This analysis was conducted through a desk analysis from the NRRP perspective.

In the second subsection, the mechanisms to ensure synergies and demarcation between the Cohesion Policy programmes and NRRPs are presented from the Cohesion Policy programmes perspective. The typology of synergies is also described, including examples. The findings resulted from a desk analysis of Cohesion Policy programmes and interviews with the MAs of selected CPR programmes.

3.3.1. Synergies envisaged in the NRRPs with the Cohesion Policy funds

This section presents the mechanisms envisaged in the **NRRPs** to carry out synergistic investments with Cohesion Policy programmes. These findings emerge from the documental analysis performed on all 27 NRRPs analysed at the PO level.

Concerning the **ERDF**, PO1 and PO2 emerge as the policy areas in which most of the synergies between the ERDF and NRRPs have been planned. Demarcation is the most identified type of synergy, followed by concurrent. In terms of MSs, Poland, Romania, Slovakia and Croatia, followed by Latvia and Spain, registered the highest number of synergies.

The French and Bulgarian NRRPs frequently mention synergies with the **ERDF**, although the types of synergies are not always specified. Instead, the Czech Republic, Estonia and Sweden provide examples of different synergies with the ERDF across three POs. On the other hand, some NRRPs do not mention any specific Cohesion Policy funds or provide any information on the planned synergies.

Box 28. Example of synergies between the ERDF and NRRPs in the NRRPs

MS	Type	Examples
Sweden	D	In the sparsely populated areas in northern Sweden, namely the Upper Norrland and Central Norrland, the ERDF will finance investments in broadband with high transmission capacity. Furthermore, the ERDF will finance investments in sustainable transport solutions and infrastructure in Norrland to facilitate business relations with other countries and increase labour mobility. The ERDF's investments in railway infrastructure complement the railway investments financed within the framework of the NRRP, which covers the whole MS. The measures in the NRRP complement and ensure synergy, coherence and agreement with the measures planned within the framework of the ERDF. Demarcation is envisaged in terms of geographical coverage. While the ERDF intervenes in these specific areas of Sweden to support this investment, the NRRP will finance the same investments at the national level but in Upper Norrland and Central Norrland.

Cyprus	D	Support for the tourism sector and the enterprises working in it are exclusively planned in the NRRP. These will pay particular attention to SMEs (e.g. hotels and other tourism establishments) operating in the countryside, mountainous and remote areas. The NRRP focuses on renovation projects to increase competitiveness and enrich the tourism offer to attract new markets/quality tourists while reducing seasonality in tourism and improving the built environment. No similar scheme will be implemented under the ERDF 2021-2027.
Estonia	P	Resources have been allocated by the NRRP to finance investments for the last mile to enable all households to connect to the high-capacity network. In addition to this investment, Estonia plans to construct very high-capacity networks financed through the Cohesion Policy funds with resources allocated from the ERDF. In addition, the ERDF will finance the construction of 5G corridors for residential and industrial areas.

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation

The Estonian NRRP (PO3 and PO4) and the Lithuanian NRRP (PO2) provide examples of specified synergies between the CF and the NRRPs. This very low level of synergy between the CF and the NRRPs can be explained by the fact that, in most cases, the NRRPs only take account of the ERDF or refer to Cohesion Policy funds without clearly distinguishing which fund the synergy was designed for. The table below provides examples of the interactions identified between the CF and NRRPs.

Box 29. Examples of synergies between the CF and NRRPs in the NRRPs.

MS	Type	Examples
Lithuania	D	The NRRP investment aims to reduce GHG emissions from former drained degraded peatlands by restoring wetland processes in these areas, creating favourable conditions for biodiversity habitats, and increasing GHG absorption, all while facilitating extensive economic activities. Additional funds for the restoration of peatlands are also foreseen from the CF, which will allocate resources for the restoration of peatlands directed to Natura 2000 protected areas and beyond, encompassing non-agricultural land areas. It also aims to restore species and habitats to a favourable conservation status in the peatlands.
Estonia	P	The investment cost for bicycles and/or footpaths for local governments outside the larger urban areas (Tallinn, Tartu and Pärnu) is EUR 5 million from the NRRP. An additional investment of EUR 20 million under PO3 will be added to this from the CF and local governments. The NRRP fund will be used first, and the CF budget will be utilised thereafter. Double funding and the double counting of indicators are excluded at the project level: support for the construction of a specific cycle and footpath is provided by only one source and is only counted once for the level of achievement.

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation

In relation to the **ESF+**, the majority of synergies identified are found within the framework of PO4. There are also some examples of interactions between the NRRPs and ESF+ in PO1. This reflects the nature of the interventions that the ESF+ can support, namely employment and labour market policies, access to social services and healthcare, and ensuring fair and inclusive access to education. The primary type of synergy planned for interactions between the NRRPs and ESF+ in the context of PO4 is concurrent, followed by demarcation. No particular MS stands out in terms of the number of interactions between the NRRP and ESF+ mentioned across the various POs, with the exception of Poland, which has three types of synergies in PO4.

Box 30. Example of synergies between the ESF+ and NRRPs in the NRRPs.

MS	Type	Examples
Italy	P	The NRRP investments aim to reduce territorial disparities in cycles I and II of secondary schools. The measures include the customisation of pathways for schools reporting critical performance levels; implementing targeted support actions for relevant school leaders through external tutors and support teachers (in Italian, mathematics and English) for at least two years; mentoring and training (including remote) for at least 50 per cent of teachers; enhancing school time with targeted projects; increased teaching hours and the presence of experts for at least 2000 schools; implementing specific mentoring; counselling and active career guidance programmes and initiatives. Before definitive implementation across the MS, a pilot project will be run by the national programme PON SCUOLA, supported by the ERDF and ESF+.
Belgium	D	The investments are intended to provide personalised support for pupils in primary and secondary education, fight school dropout and address psychological and educational diseases. In addition to the planned financial resources from the NRRP, to prevent any double funding, schools receiving ESF+/YEI resources will not receive the NRRP budget.

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation

As for the **JTF**, the majority of the synergies identified in the NRRPs were related to PO2, which aligns with the focus of the JTF. However, most of the synergies could not be categorised due to the lack of detail in the NRRPs. Greece stands out as the only case of an MS identifying concurrent synergies across three different POs (PO1, PO2, and PO4).

Box 31. Example of synergies between JTF and NRRPs.

MS	Type	Examples
Greece	C	One of the Specific Objectives of the JTF focuses on the just and viable transition of the coal-affected areas of Greece – the Western Macedonia Region and the Municipality of Megalopolis – which are directly impacted by the national strategy for fully decarbonising power generation by 2028. The investments planned through the NRRP and the National Energy and Climate Plans (NECP) will complement the JTF interventions. For example, the NRRP Component 1.1 proposes investments in restoring the mine lands in Western Macedonia and Megalopolis as part of the broader targets set out in the NECP and the Territorial Just Transition Plan (TJTP) for the productive and environmental revitalisation of the coal-affected areas and the development of new land uses that can accommodate and support differentiated activities.
Poland	C-D	The demarcation of interventions between the NRRP and the Cohesion Policy programmes 2021-2027 will be ensured. Activities related to the city's pursuit of climate neutrality and resilience to climate change should be coordinated with interventions promoted by the Cohesion Policy funds in the same area, complementing each other with projects financed from other sources, especially in the field of thermal modernisation, energy efficiency, renewable energy, low-emission city rolling stock and adaptation to climate change. In the areas covered by the Territorial Just Transition Plans (TJTP), the NRRP investments in the field of green transition will complement the types of operations and projects financed by the JTF.

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation

A final notable finding is that the NRRPs often mention synergies with **Cohesion Policy funds** without indicating the specific fund they are referring to (i.e. they display synergies between the NRRP and Cohesion Policy funds by considering these as a single block of

funds). PO2, which includes interventions in green transitions and climate change and adaptation, has the most significant number of synergies. This is followed by PO1, which is dedicated to R&I, SME competitiveness and digital transformation. Demarcation is the primary modality employed by the NRRPs to define the scope of action with the entire set of Cohesion Policy funds. Conversely, PO5 is the policy area in which the lowest number of interactions were detected. Among the NRRPs analysed, those of Lithuania, Poland, Slovenia, and Slovakia presented the most comprehensive plans defining synergies and interactions across four POs. The NRRPs of the Czech Republic and Portugal provided plans on synergies and interactions in three POs.

Box 32. Example of synergies between the Cohesion Policy funds and the NRRPs.

MS	Type	Examples
Lithuania	C	<p>The NRRP reform and investments aim to ensure equal, safe, uninterrupted and efficient provision of health care during health emergencies. The investments envisage the modernisation of the infrastructures and training to strengthen the skills of personnel in healthcare institutions working during emergencies and crises. The main investments entail the construction of 5 infectious disease cluster competence centres, the modernisation of 7 personal healthcare infrastructures, which should also be adapted to respond to crises, and the acquisition of equipment for these 12 hospitals.</p> <p>The Cohesion Policy funds will support investments focused on strengthening the emergency infrastructure of the municipal personal healthcare infrastructures to prepare for responding to emergencies. Moreover, they will support investments in appropriate infrastructure for the timely and high-quality provision of medical products.</p>
Portugal	D	<p>The NRRP provides support for administrative modernisation and the digital transition of the public administration in the C19 component. However, this component of the NRRP is limited to the digital capacity building of the central public administration, with the digital transition of the local public administration being foreseen under the Cohesion Policy funds.</p>
Slovakia	S	<p>The line of investments, 'Scholarships for the best national and foreign students and remuneration for universities,' is a phased investment between the NRRP and the Cohesion Policy funds. The investment from the NRRP covers scholarships for students entering in 2022-2024, and Cohesion Policy funds will cover scholarships for students entering in 2025-2027.</p>
Poland	D	<p>Activities to support primary healthcare will be financed by national funds and the RRF. The Polish NRRP states that mechanisms to ensure coordination among the different sources of funding will be provided in the document 'Healthy Future. Strategic framework for the healthcare system for 2021-2027'.</p> <p>Some details provided in the NRRP include support for medical entities primarily providing hospital treatment services. Activities to support primary healthcare will be financed by national funds, REACT-EU and 2021-2027 Cohesion Policy funds.</p> <p>Cohesion Policy funds 2021-2027 will support activities aimed at developing and modernising the healthcare infrastructure resources, including, in particular, medical equipment. These investments will be long-term and directed at supporting primary care, healthcare and hospital care, taking into account the development of the deinstitutionalisation of healthcare.</p>

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation

3.3.2. Synergies envisaged in the Cohesion Policy funds with the NRRPs

This section presents the key mechanisms envisaged in the Cohesion Policy programmes to plan and implement synergies with the NRRPs. These findings emerged from both the documental analysis of the Cohesion Policy programme and the interviews conducted with the MAs of selected Cohesion Policy programmes.

The documental analysis at the **PA level** indicates that the ERDF is the primary fund interacting with the NRRPs, mainly through demarcation and concurrent synergies. These types of synergies are also found between the NRRPs and ESF+.

Box 33. Example of synergies between Cohesion Policy funds and the NRRP

The **Romanian** PA provides clear examples of how the RRF will interact with the ERDF to support interventions in digital connectivity. More specifically, regarding the digitalisation of the public administration at a national level, the RRF will intervene to support the government cloud, the national public cyber security system, as well as digitisation at the level of specifically identified institutions (Ministry of Justice, the Public Ministry, the Public Employment Service, the pension system, the financial-fiscal system, etc.), while the ERDF finances the digital transformation of public services related to the life events of citizens and companies (other than those provided for in the seven digital platforms financed through the NRRP), specific e-education and e-culture interventions, as well as interoperability and support for governmental processes at the level of public institutions that are not beneficiaries of the NRRP allocation.

Source: Consortium elaboration

This was further confirmed by the documental analysis at the **PR level**. All Cohesion Policy funds, but in particular the ERDF and the ESF+, exhibit strong synergies with the NRRPs, as the NRRPs share many policy areas in common with Cohesion Policy funds. As indicated in the table below, demarcation and concurrent synergies are the most common types.

Table 22. Types of synergy among Cohesion Policy funds and NRRPs

TYPE	NRRP			
	D	C	P	NS
ERDF	169	100	36	429
ESF+	41	58	12	235
CF	12	11	1	5
JTF	9	13	0	43

Source: Consortium elaboration based on survey data

Legend: P: phased; C: concurrent, D: demarcation, NS: not specified

Regarding the synergies between Cohesion Policy funds and the NRRPs, the majority of the programme authorities interviewed confirmed the existence of some form of synergy with NRRPs described in their programme documents, covering all the categorically distinct types of synergies (concurrent and demarcation). When present, interviewees emphasised their contribution to ensuring that Cohesion Policy programmes and NRRPs respective objectives are achieved in a complementary and strategically aligned manner.

As for the **concurrent** synergies macro-category, the majority are combined: typically, Cohesion Policy funds serve to complement extensive, financially significant infrastructural networks, social service facilities, or large-scale schemes for SMEs that are financed by the NRRP through specific investments.

These synergies manifest across a broad spectrum of policy fields, encompassing industrial and transport policies, healthcare, education, and innovation. For example, within the

domain of industrial policy, Cohesion Policy funds may bolster NRRP initiatives aimed at revitalising manufacturing sectors or enhancing sustainable production processes. In transport, Cohesion Policy programmes' contributions could support the extension of mobility networks, integrating with RRF-funded foundational infrastructure projects. An illustrative case is detailed in the box below.

Box 34. Examples of combined synergies and demarcation between the Cohesion Policy funds and NRRPs.

The multi-fund Programme in **Slovakia** (ERDF, CF, JTF, ESF+) highlights that the NRRP finances civil works projects. These include the electrification or modernisation of railway lines 'digital' projects, such as upgrading dispatching systems and enhancing line safety, both within the Trans-European Transport Networks (TEN-T) and beyond. Additionally, the NRRP will allocate funds for renewing public passenger transport rolling stock, including trainsets and locomotives.

Complementing this, the ERDF and CF will support the dispatching and electrification of lines, as well as the modernisation of specific railway lines. This includes designated operations on selected lines within the TEN-T network, notably the Žilina - Košice - State Border (SR/UA), Žilina - Košice - State Border (SR/CZ), and the line from the Czech Republic border (CR/RR) - Kúty - Bratislava - Štúrovo - State Border (SR/HU). There will also be investments in building the European Rail Traffic Management System (ERTMS) and developing key nodes on corridor lines in Bratislava, Košice, and Žilina.

Moreover, projects involving the dispatching, electrification, reconstruction, or modernisation of selected railway line sections outside the TEN-T network will receive ERDF support. This includes the renovation of regional railway lines, renewal of rail passenger transport vehicles, upgrades to railway crossings, and the reconstruction of station buildings. Inclusion or exclusion from the TEN-T network defines the demarcation for access to the ERDF funding.

Source: Consortium elaboration

Phased synergies are predominantly reported in the sequential sub-category, as they are mainly associated with the differing implementation durations of the NRRPs and the Cohesion Policy programmes ⁽⁷⁹⁾. The NRRPs initiate certain projects with the foresight that they will be completed with Cohesion Policy funds. Concretely, the project is broken down into functional lots, forming an ideal financing pipeline where the initial stages are funded by the RRF and the later stages by the CPR funds. This approach ensures a continuous flow of resources and a seamless transition from one funding source to another, facilitating the smooth execution and completion of projects.

Box 35. Examples of sequential synergies between the Cohesion Policy programmes and NRRPs.

In the context of **Latvia's** Cohesion Policy, the national multi-fund (ERDF, ESF+, CF) Programme highlights a strategic approach where the RRF initially supports the launch of EDIHs. These hubs are envisioned as centres of technological innovation and digital transformation to foster a robust digital ecosystem. Once operational, their initial development and activities are funded and supported by the RRF, establishing a solid foundation for their growth and impact. Subsequently, as part of a sequential synergy, the ERDF steps in to continue this support. The ERDF's involvement is not merely the continuation but an expansion and enhancement of the initiatives started by the RRF. This includes further developing the infrastructure of these EDIHs, enhancing their technological capabilities, and extending their reach and services. This strategic overlap and handover between the RRF and ERDF ensure that the EDIHs are not only successfully initiated but are also sustainably supported for long-term development and innovation.

Source: Consortium elaboration

⁽⁷⁹⁾ Another explanatory element is the combination of reforms under the NRRPs and investments under the cohesion policy programmes, but this was out of the scope of this study.

Demarcation represents the most prevalent form of synergy, manifesting through various arrangements such as thematic, geographical, beneficiary, or timing criteria. For instance, demarcation can be based on a clear division of competencies based on policy fields (an example is when the NRRPs can primarily focus on specific interventions to favour digital and green transitions). This thematic demarcation allows for a clear differentiation of the roles and objectives between the NRRPs and CPR programmes. The RRF will finance investments directly supporting green transition and digital transformation, while the Cohesion Policy will support training to develop skills needed in these sectors. Other identified cases include demarcation based on population density, distinguishing between sparsely populated and densely populated areas. Finally, demarcation can also include a temporal aspect, as the NRRPs typically undertake projects with shorter durations compatible with its scheduling constraints, while more prolonged and extensive initiatives are reserved for the Cohesion Policy funds. This temporal demarcation ensures that projects are aligned with the respective timelines and capacities of the NRRPs and Cohesion Policy funds, facilitating the efficient and effective allocation of resources.

Box 36. Examples of demarcation between Cohesion Policy funds and NRRPs

In the Programme Report ‘Efficient Human Resources of **Croatia**’ (ERDF/ESF+), interventions focus on various aspects of the labour market. The ERDF and ESF+ are allocated to a broad spectrum of labour market measures, encompassing initiatives such as workforce training, upskilling, and employment support services. The NRRP, on the other hand, specifically finances labour market policy measures in the green and digital sectors. This creates a demarcation where the NRRP targets niche areas of labour market transformation, particularly focusing on the emerging needs of the green and digital economies, while the programme caters to the wider labour market requirements.

The Territorial and Settlement Development Programme (ERDF/ESF+) in **Hungary** clarifies demarcation with the NRRP in relation to the actions included in SO 4.2 dedicated to improving equal access to inclusive and quality services in education, training and lifelong learning through the development of accessible infrastructures. The Cohesion Policy programme will build new crèches and mini/family crèches in municipalities with less than 3000 inhabitants; it will also support maintenance work on churches and nurseries. The NRPP will build crèches, mini/family crèches and nurseries in municipalities with 3000 inhabitants or more. The approach ensures a territorial demarcation scope.

3.4. Transfers and contributions to the budgetary guarantee

This section presents the financial transfer choices made by MSs pursuant to the 2021-2027 CPR regulation (see box below). In-depth details are provided on whether and why MSs have decided to transfer part of their allocation among CPR funds and between CPR funds and other EU instruments under direct or indirect management. Furthermore, it presents the contribution to the budgetary guarantee under InvestEU. The analysis that emerges in this section is based on the desk review of the PA documents, the programme documents and interviews with selected programme authorities.

Box 37. Transfers and contributions to the budgetary guarantee in the CPR

Specifically, according to Art. 26, MSs may request, in the PAs or in a request for a programme amendment, a transfer of up to 5% of the initial national allocation of each fund to any other instrument under direct or indirect management; a transfer of up to 5% of the initial national allocation of each fund to another fund or funds (this is up to 15% for transfer from the ERDF or the ESF+ to the JTF, according Art. 27); an additional transfer of up to 20% of the initial national allocation per fund between the ERDF, the ESF+ or the CF within the MSs’ global resources under

the investment for jobs and growth goal. Moreover, MSs whose average total unemployment rate for the period 2017-2019 is under 3% may request such an additional transfer of up to 25 % of the initial national allocation.

Pursuant to Art. 14 of the CPR, MSs may allocate, in the PA, an amount of up to 2 % of the initial national allocation for the ERDF, ESF+, CF and EMFAF, respectively, to be contributed to the InvestEU Programme and delivered through the EU guarantee and the InvestEU Advisory Hub in accordance with Article 10 of the InvestEU Regulation. MSs, with the agreement of the MA concerned, may further allocate an amount of up to 3 % of the initial national allocation of each of these funds after 1 January 2023 through one or more programme amendment requests.

Overall, the sum of the transfers and contributions shall not exceed 5% of the initial national allocation of each fund.

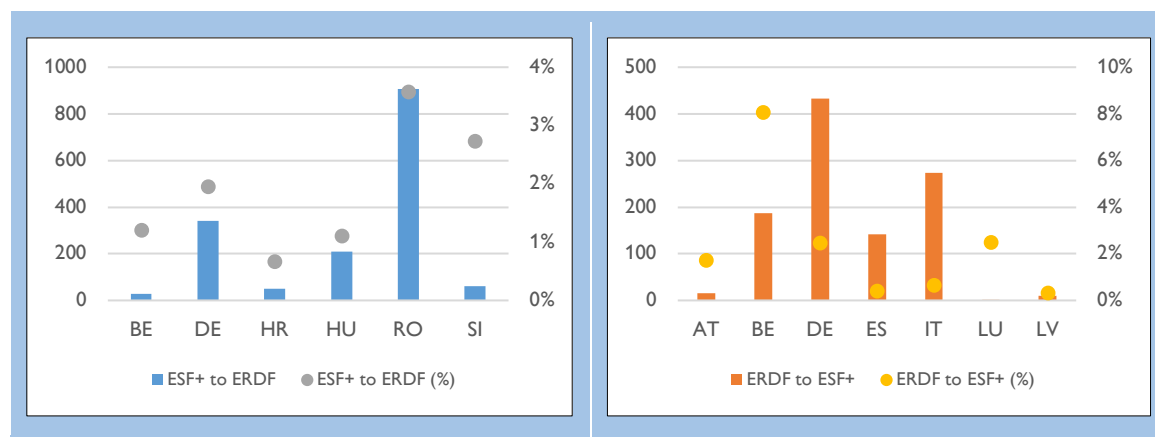
3.4.1. Transfers among CPR funds

This section details the transfers among CPR programmes. Overall, in the 2021-2027 programming period, planned transfers include those between the ERDF and ESF+, between the CF and other CPR funds, between the ERDF/ESF+ and JTF, and between the CPR funds and BMVI.

In relation to transfers between the **ERDF and ESF+**, Austria, Belgium, Croatia, Germany, Hungary, Italy, Luxembourg, Latvia, Romania, Spain, and Slovenia are the MSs that have approved transfers between the ERDF and ESF+. All transfers are around or below 3% of the total EU allocation of both the ERDF and ESF+ funds, with the notable exception of Belgium (8%) from the ERDF to the ESF+.

Figure 7. Transfers between the ERDF and ESF+ by MS.

(absolute values in EUR million and percentages)



Source: Consortium elaboration on data provided by DG REGIO and Cohesion data

Box 38. Examples of the justification for transfer between the ERDF and ESF+

MS	Funds / Category of region	Justification
Austria	ERDF (More developed & Transition) -> ESF+ (More developed)	Regarding the Austrian programming period 2021-2027, less funding is available for the ESF+ compared to the previous programming period. For this reason, in order to ensure continuity

	developed & Transition)	<p>with the previous period and balance the two funds, transfers were planned from the ERDF to the ESF+.</p> <p>Despite the presence of transfer justification in the PA documents, interviews with MAs overseeing both the ERDF and ESF+ programmes revealed that transfers are not contemplated in the future. This decision is attributed to the perception that neither the budget constraints of the Cohesion Policy funds nor the complex procedures to request transfers warrant their consideration.</p>
Belgium	ERDF-ESF+ (More developed) -> ESF+-ERDF (Transition)	<p>The transfer within Flanders is justified for a more equitable use of resources throughout the Flemish Region. Specifically, the ERDF resources will be used to realise the ambitions of a smart and sustainable Limburg. For this reason, the MS has foreseen a transfer of resources provided by the ESF+ to the ERDF within the Limburg transition region of around EUR 28 million. This strengthens the province of Limburg's continued focus on sustainable, digital and innovative transition.</p> <p>The MA of the ESF+ Flanders programme was consulted.</p> <p>The Brussels Capital Region has also opted to transfer up to EUR 80 million of the ERDF resources to the ESF+ component. This is intended to strengthen the ESF+ programmes active in its territory, specifically addressing the significant challenges that the region faces in terms of active inclusion.</p>
Germany	ERDF-> ESF+ (More developed) ESF+-> ERDF (Transition)	<p>Germany justifies this transfer by highlighting significant decreases in the allocation of ESF+ funding with simultaneous increases in ERDF programme funding. Consequently, more developed regions have decided to reallocate funds from the programmes financed by the ERDF to programmes financed by the ESF+. Conversely, the opposite situation has emerged in transition regions. This strategic reallocation will ensure continuity of action with respect to the previous programming period.</p>
Spain	ERDF-> ESF+ (More developed & Transition)	<p>The amount received for the ESF+ in 2021-2027 is lower than in the previous programming period. This decrease would have seriously jeopardised the consolidation of the policies promoting employment, social inclusion, and education that were developed up to this point. This transfer of funds, therefore, contributes to facilitating a more inclusive economic recovery and the continuity of action. The contribution of the ESF+ is essential for improving public employment services and the effectiveness of active labour market policies.</p>
Croatia	ESF+-> ERDF (Less developed)	<p>Croatia has implemented the transfer of 2.5%, amounting to EUR 49 million, of its ESF+ funds to the ERDF. This decision was made to support and advance ongoing initiatives to develop the social care system within the MS. The transferred funds are specifically allocated to sustain and expand processes that have already been initiated. One key objective is the continued commitment to the transformation of social care services and, in particular, the already initiated process of 'deinstitutionalisation'.</p> <p>According to the ESF+ MA, the transfer was approved to ensure critical social infrastructure investments in complementarity with the ERDF within the same policy objective.</p>
Hungary	ESF+-> ERDF (Less developed)	<p>The transfer from the ESF+ to the ERDF aligns with the Hungarian government's objective of maintaining the results of the economic policy pursued before the crisis, i.e. preserving high employment levels and the value of labour income. In terms of EU policy</p>

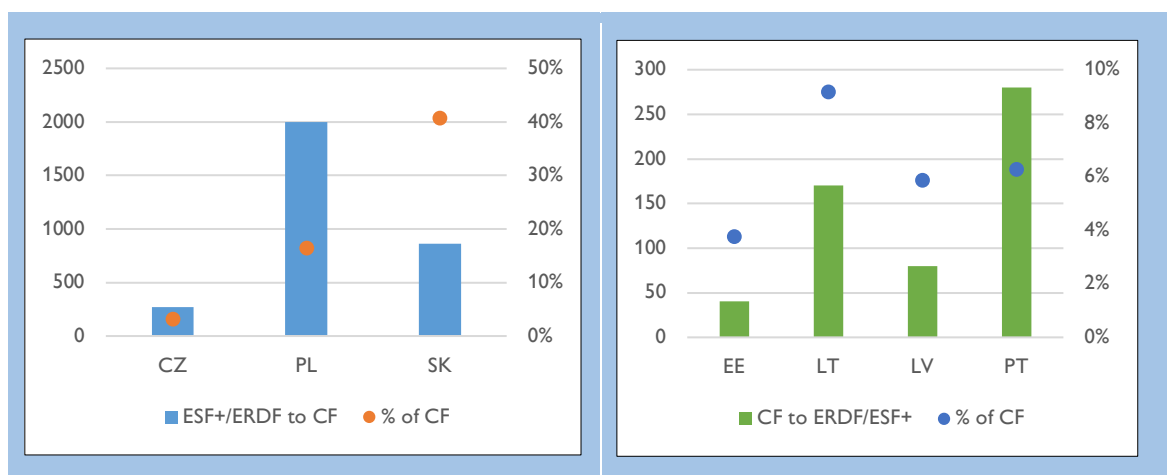
		<p>objectives, the transferred ERDF resources will finance infrastructure interventions under PO4 in the Programme for Spatial and Urban Development Plus.</p> <p>The main objective of transfer from the ESF+ to the ERDF is to support interventions to expand social and education infrastructure and services, with a focus on young children, as well as investments to upgrade healthcare infrastructure and services. The aim is to improve the quality of services and working conditions through the development of modern infrastructure and the purchase of modern and innovative equipment. Moreover, this should reduce social exclusion of families, children, people with disabilities, and the elderly.</p>
Romania	ESF+ -> ERDF (More developed and less developed)	<p>Romania faces numerous socio-economic challenges, including the implementation of an inclusive minimum income reform, support for educational institutions and integrated social services, a vast expansion of primary and preventive healthcare, as well as investments in training and activation measures in combination with a new law on social dialogue.</p> <p>To make progress in providing quality public services that lead to better social outcomes, be it social policy and poverty eradication, employment policy, education or healthcare, the application of quality standards for both the provision of services and the quality of the available infrastructure is necessary. The transfer is foreseen to support human capital interventions in education, employment, health and social inclusion, as well as the provision of related infrastructure contributing to the success of complementarity ESF+ interventions.</p>
Slovenia	ESF+ -> ERDF	<p>During the pandemic, certain sectors experienced a shortage of suitable workers. Moreover, the country faces demographic trends posing challenges to the labour supply. The PA foresees the transfer of resources from the ESF+ to the ERDF to support measures to encourage workers, enterprises and entrepreneurs to adapt to the changes and promote active, healthy ageing and healthy, well-adapted working environments. The ERDF interventions should encourage lifelong learning, particularly through flexible options for upskilling and reskilling for all, based on labour market needs, promoting professional mobility, and modernising labour market institutions and services. These actions are channelled in PO1 actions. In addition, investments from Cohesion Policy funds will be coupled with systemic reform financed by the NRRP.</p>

Source: Consortium elaboration

Transfers between the **ERDF/ESF+ and CF** have been approved by the Czech Republic, Estonia, Lithuania, Latvia, Portugal, Poland and Slovakia. Both Poland and Slovakia have approved substantial increases in the CF allocation from the ERDF and ESF+. These two MSs, along with the Czech Republic, intend to address pressing needs related to insufficient funding in the infrastructure network and, in particular, to increase resources for climate adaptation projects. On the contrary, the decision to allocate part of the CF resources to the ERDF or ESF+ (Estonia, Lithuania, Latvia, and Portugal) is generally justified by the need to reduce inequality within the MS or alleviate social burdens exacerbated by the pandemic crisis. In general, the amount of funds transferred from the CF to the ERDF and ESF+ is substantially lower than the reverse transfers (ERDF/ESF+ to CF). More details on the justifications by MSs are presented in the subsequent box.

Figure 8. Transfers between ERDF/ESF+ and CF by MS.

(absolute values in EUR million and percentages)



Source: Consortium elaboration on data provided by DG REGIO and Cohesion data

Box 39. Justification of transfer between CF and other CPR funds

MS	Funds / Category of region	Justification
Czech Republic	ESF+ (all categories of regions) - > CF	The transfer of resources from the ESF+ to the CF is justified by pressing shortcomings hindering the development of the Czech economy. These shortcomings are attributed to the still underdeveloped infrastructure network and inadequate investment in environmental protection, climate adaptation, energy efficiency and renewable energy solutions. These fundamental needs are mainly to be addressed through funds from the CF.
Estonia	CF -> ERDF /ESF+ (regions in transition)	The aim of the transfer from the CF to the ERDF/ESF+ is to reduce regional and social inequality in Estonia, more specifically, business development in south-eastern Estonia to reduce regional disparities (ERDF); care-related activities, which will contribute to the implementation of long-term care reform and support the integration of the health and social sectors (ERDF); the reduction of child poverty, the prevention and reduction of early school leaving among young people and the adaptation of education to labour market demands (ESF+).
Lithuania	CF -> ERDF (More developed)	The transfer from the CF to the ERDF is justified by the EU requirement that the MS allocate at least 25% of the ERDF funds to PO 1 'Advanced Lithuania' and at least 30% to PO 2 'Greener Lithuania'. Without this transfer of funds, funding for PO 1 would be insufficient to implement the planned changes and address chronic problems.
Latvia	CF-> ERDF (Less developed)	To align Latvia's budget allocation with the identified needs and measures envisaged under the ESF+, ERDF and CF funding, a transfer from the CF to the ERDF is foreseen to increase the number of planned investments in sustainable and green transport infrastructure and achieve climate objectives. According to the interview with the MA of the multi-fund programme

		(ERDF/CF/ESF+), the flexibility provided by the transfer option facilitates the implementation of the programmes.
Poland	ESF+ (Less developed) - > CF	The transfer from the ESF+ of 'less developed' regions to the Polish CF is justified by the MS needs, which significantly exceed the budget allocated for activities financed by the CF. The transfer amount will be entirely allocated to climate-related expenses.
Portugal	CF-> ESF+ (all categories of regions)	Portugal's justification for the transfer of funds from the CF to the ESF+ is rooted in structural challenges, especially following the pandemic, related to employment, skills and social inclusion, which remain in the policy areas covered by the ESF+. Portugal had a significant increase in funding for the CF with respect to the previous programming period, thereby justifying the allocation of a small part of this Fund to the reinforcement of the ESF+.
	CF EMFAF ->	This transfer aims to support the EMFAF under PO2, allowing it to address identified needs not covered by the EMFAF resources allocated to Portugal in this programming cycle.
Slovakia	ERDF/ESF+ (both More developed and less developed) - > CF	Given the environmental and transport needs identified in the national strategies and commitments, the CF allocation is insufficient. Therefore, to support the implementation of commitments and meet the requirements stemming from EU environmental and transport legislation, Slovakia plans to make use of the possibility of a 10% transfer of resources from the ERDF and a 2% transfer of resources from the ESF+ to the CF, thereby increasing the initial allocation of the CF by 40%. The proposed transfer reflects the urgent priorities related to the construction of transport and environmental infrastructure and the ambition to cover the growing investment debt in these areas.

Source: Consortium elaboration

Only one MS, Greece, has approved a transfer from the **ERDF and ESF+ to the JTF**. These funds are largely transferred from 'less developed' regions (EUR 500 million accounting for 92% of the transfer) and, in a smaller amount, from 'transition' regions (EUR 45.5 million, accounting for the remaining 8%). The justification behind this transfer decision is highlighted in the box below:

Box 40. Justification of transfer between ERDF/ESF+ to JTF

MS	Funds / Category of region	Justification
Greece	ERDF and ESF+ (both less developed and in transition) -> JTF	<p>The amount transferred from the ERDF and ESF+ funds to the JTF by Greece is far below the permitted transfer limit. The transfer was justified by the MS's need to stem job losses in coal regions due to the phasing out of coal.</p> <p>In addition, the EC revised the guidelines for regional aid, recognising the need to support specific regions. For the Greek regions concerned, this implies that the attraction of investments is expected to significantly increase, thereby increasing the financial needs. The transfers will, therefore, address the low level of business innovation, the weak ecosystem for promoting start-up entrepreneurship and the extremely high unemployment rates in lignite-dependent regions.</p>

Source: Consortium elaboration

Greece is the only MS which has also approved a transfer between several **CPR funds and the BMVI** for a total amount of EUR 620 million; almost 50% of this amount comes from the ERDF of less developed regions and, to a lesser extent, from the ESF+, CF and EMFAF (see the box below).

Box 41. Justification of transfer between ERDF to BMVI in the Greek case

MS	Funds Category of region /	Justification
Greece	ERDF (Less developed), ESF+, CF, EMFAF -> BMVI	The main challenges the MS is facing are strictly related to its geographical position and to the need to protect and safeguard the maritime border, limit the migration pressure, and ensure good living conditions for both residents and asylum seekers. The 2021-2027 BMVI budget (EUR 558 million) is lower than the current needs estimated for the programming period, equal to EUR 2.5 billion. At the same time, it is difficult to cover these increased needs with the national budget, given the budgetary constraints still in place following the financial crisis and the pandemic. For these reasons, transfers from the ERDF, ESF+, CF and EMFAF are planned toward BMVI.

Finally, from the interviews with Slovenian programme authorities, it emerged that Slovenia intends to pursue a financial transfer of the HOME funds from the BMVI to the ISF. In contrast to the Greek case, the decision was not a strategic allocation of funds (i.e. already included in the programmes) but a consequence of external events. The transfer is justified by the fact that, during the programming phase of the Slovenian BMVI programme, Croatia had not confirmed its decision to join Schengen. This was later confirmed on 1st January, and Slovenia lost control of the external borders. Some operations planned under the BMVI were no longer eligible in accordance with the specific fund Regulation (40% of planned investments under BMVI). The interviewee underscored the fact that the MC has already confirmed the financial transfer. Both programmes, therefore, need to be revised to account for this. The main advantage of this transfer is that the funds will not be lost.

3.4.2. Transfers between CPR programmes and other EU funds and instruments

Financial transfers from Cohesion Policy funds to EU funds and instruments are explicitly foreseen in the EU funds and instruments documents in the following cases:

In the **CEF**, the main features of transfer are:

Firstly, the transfer of funds is pre-determined ⁽⁸⁰⁾ by the EU regulation itself, with the CEF establishing regulation mandating the transfer of EUR 11.286.000.000 from the CF. Secondly, the funds transferred under the CEF must be exclusively spent in MSs that are eligible for funding from the CF, taking into account the following:

- any disadvantages stemming from permanent geographic vulnerabilities;
- cross-border and missing links;

⁽⁸⁰⁾ Art. 4 REG (EU) 2021/1153 establishing the Connecting Europe Facility.

- technical assistance to enhance the institutional capacity and efficiency of public administrations.

Furthermore, the multiannual work programme includes a dedicated section that defines the supported actions and their funding sources, which include the general envelope, the cohesion envelope, and the military mobility envelope. Hence, the programme provides detailed strategies for transport investments funded by the Cohesion Fund. ⁽⁸¹⁾

MSs may request that the allocated resources under shared management be transferred to the **TSI**. These resources must be utilised exclusively to finance clearly identified technical support requests and can be transferred back if they are not committed. The transferred resources will benefit the MS that requested the transfer, including at regional and local levels. ⁽⁸²⁾ However, based on the screening of work plans, no further specific strategies for implementing allocations transferred from Cohesion Policy funds have been identified.

HE has specific provisions outlined both in the Regulation ⁽⁸³⁾ and in the Commission notice on synergies between the ERDF and HE. ⁽⁸⁴⁾ A MS can limit the territorial scope of the transfer to a specific region covered by a Cohesion Policy programme. In particular, the guidance indicates that the transferred resources shall be used:

- for R&D&I areas identified as priorities in national or regional S3;
- to strengthen participation in HE by beneficiaries from regions or MS with low participation rates;
- to preserve administrative capacity at the national/regional level in the selection and follow-up of R&D&I projects.

However, upon reviewing the WP, no additional strategic indications regarding transferred resources and their relevance for the Cohesion Policy funds have been identified. While the previously mentioned three funds, CEF, TSI and HE, have foreseen transfers, only **CEF** provides detailed strategies for utilising them.

Article 17 (8) of the Erasmus+ regulation establishes the possibility of transferring resources allocated to Member States under shared management in the **Erasmus+** programme. Mirroring CPR provisions, the transferred resources shall be used for the benefit of the MS concerned.

Based on Art 26(1) of the CPR, two MSs decided to transfer financial allocations between CPR funds and EU funds and instruments in their PAs, i.e. Malta with EUR 5 million and Germany with EUR 57 million.

Although not envisaged in the PA, the national Lithuanian Programme for the European Union fund investments 2021-2027 (ERDF, ESF+, CF, JTF) has approved a transfer to HE. The approved transfer totalled EUR 18.5 million, EUR 7.1 from the ERDF more developed region category and EUR 11.3 from the less developed category ⁽⁸⁵⁾.

⁽⁸¹⁾ Section 6 of CEF - work programme for 2021-2027.

⁽⁸²⁾ Art. 6 Reg (EU) 2021/240 establishing TSI.

⁽⁸³⁾ Art. 15 Reg (EU) 2021/695 establishing Horizon Europe.

⁽⁸⁴⁾ COMMISSION NOTICE (2022/C 241/03) Synergies between Horizon Europe and ERDF programmes.

⁽⁸⁵⁾ The approval of transfer was provided first during the interview and then verified in SFC. The EC has approved an amendment to the programme.

Box 42. Justification of the transfer from Cohesion policy funds to EU funds and instruments

MS	Funds / Category of region	Justification
Malta	ERDF-> HE	Malta approved the transfer from the ERDF allocated to transition regions to HE. This was justified by the need to create more synergies between HE, the Framework Programme for R&D&I and Cohesion Policy funds (as highlighted in the Malta S3 Strategy 2021-2027). The main objective of this transfer is to facilitate collaboration between European Partnerships and private and/or public sector partners at the international level and strengthen the impact of R&I through HE support.' ⁽⁸⁶⁾ .
Germany	ESF+ (more developed regions and transition regions) -> ERASMUS+	Germany approved the transfer of the financial allocation of the ESF+ (both from more developed regions and transition regions) to the Erasmus+ programme. This strategic policy decision is based on the desire to strengthen the Erasmus+ key action '1a - learning mobility of university students'. In line with the PA of Germany, this financial allocation is used to promote European mobility, especially for students with more disadvantaged backgrounds. In addition, target groups that are underrepresented in university mobility are to be addressed and financially supported, especially during their stay abroad. Attention will be dedicated, particularly, to students with a disability or chronic illnesses, students who go abroad with children, recent graduates and students working to support their studies. Increasing social inclusion and fair and sustainable access to education activities underlies the synergies with the ESF+.
Lithuania	ERDF (more developed regions) -> HE	The key motivation for this transfer was to encourage more active cooperation between stakeholders in the field of scientific research and innovation at the international level and to encourage Lithuanian applicants to actively take advantage of the HE opportunity. According to the MA, the transfer mechanism offers enhanced flexibility, distinguishing it from previous arrangements. The MA underscored that this multifaceted flexibility is instrumental for optimising the use of funds but also noted that lengthy negotiations were necessary to finalise the transfer.

Overall, according to the interviews, authorities of selected programmes generally have limited experience with transfers to EU funds and instruments. However, several MAs underscored the possibility of considering the transfer option for HE and Erasmus+. These MAs have not identified anything concrete yet but are monitoring this option.

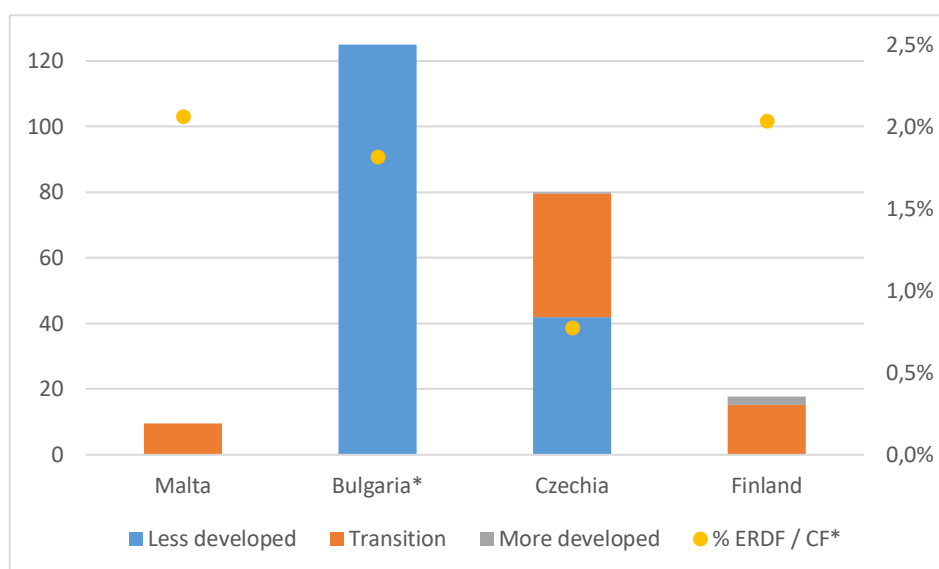
⁽⁸⁶⁾ PA of Malta.

3.4.3. Contributions to the budgetary guarantee under InvestEU

The ERDF, ESF+, and CF can be used to provide guarantees under InvestEU for investment and financing operations in the Member States or to contribute to the InvestEU Advisory Hub. The funding will be utilised to achieve the policy objectives outlined in the PA, which are included in the provisions on the preparation and submission of the PA as outlined in the CPR for the current programming period.

The PA analysis indicates that only four PAs (Bulgaria, Malta, the Czech Republic and Finland) are planning to assign part of their initial financial allocation to the InvestEU programme. This strategic policy decision aims to contribute to the achievement of the PO(s) selected in the PA and to support investments essentially in the category of contributing regions.

Figure 9. Contribution to the budgetary guarantee InvestEU programme



Source: Consortium elaboration on DG REGIO data, contributions are expressed in absolute terms (EUR million) and as a percentage of the EU financial allocation.

*Only in the case of Bulgaria's allocations from both ERDF and CF are considered

The figure shows that Malta and Finland decided to contribute the most significant amount in financial resources to the InvestEU programme, if compared to the ERDF national financial resources. In absolute terms, Bulgaria represents the country that transfers more to the InvestEU programme. The box below describes the justification for financial transfers to InvestEU in the four MSs that adopted this approach.

Box 43. Justification for the financial contribution to the InvestEU programme

MS	Justification
Bulgaria	<p>The contribution to the InvestEU programme intends to support specific interventions:</p> <ul style="list-style-type: none"> - In PO2, the EUR 25 million contribution from CF to InvestEU should support sustainable infrastructures by reinforcing financing and investment operations that contribute to the sustainability of the economy and its environmental and climate dimensions. Operations include interventions to improve sustainable water management, interventions for the transition to a circular economy, resource efficiency and pollution reduction. Considering the significant budget needed to implement these

	<p>interventions, the use of InvestEU programme instruments appears to be necessary, as available CPR funds cannot cover all the costs.</p> <p>- In PO1, the EUR 100 million contribution from ERDF to InvestEU will support SME competitiveness, enterprise growth, and the competitiveness of SMEs and small and mid-market capitalisation companies by helping to improve their digitalisation, innovation and green transition capacities.</p> <p>Overall, these contributions to the InvestEU programme aim to address specific market failures in PO1 and PO2 by providing support to final beneficiaries more efficiently by integrating and simplifying the financing offered under a single budget guarantee scheme. Moreover, they contribute to differentiating geographical coverage and simultaneously cover key Union policy areas that would otherwise be unfunded or underfunded. An additional benefit is the mobilisation and involvement of a large volume of private resources for final beneficiaries. This contributes to improving the local, sustainable finance system and reorienting private capital towards sustainable investments. Also, using InvestEU reduces the administrative burden through a single set of specialised support forms and rules, including financial instruments, and streamlines reporting, monitoring and auditing rules implemented under the responsibility of the implementing partner and the EC. Finally, no national co-financing is required, there are simplified state aid rules, and national expertise can be improved through close cooperation with EC services.</p>
Czech Republic	<p>The transfer of EUR 80 million to the InvestEU fund is mainly to support SME competitiveness within PO1. The MS intends to allocate more than half of the financial envelope to less developed and transition regions. The distribution of the InvestEU allocation to the individual categories of regions was made on the basis of the Absorption Capacity Analysis. The guarantee provided by the MS compartment under InvestEU will enable more effective financing conditions in all regions of the Czech Republic and thereby address the requirements for the recovery of the Czech economy.</p>
Finland	<p>Finland decided to opt for the option provided through Article 14 of the CPR of EUR 17.6 million. More specifically, in addition to the PR 'Innovation and skills', supported by the ERDF, ESF+ and JTF, the PA indicates that the contribution to the InvestEU programme is intended to support SME competitiveness and their ability to access financing opportunities more easily. This decision has been defined as an appropriate alternative for implementing financial instruments. This should facilitate SMEs' access to financing and leverage the channelling of private financing into investments in accordance with the PO1 goal, taking PO2 goals into account as necessary. 2% of the ERDF funding of the PR 'Innovation and skills' will be allocated to supporting the key goals of the PR that promote RDI activities, digitalisation, and the growth and competitiveness of SMEs. In addition, the PR promotes actions to sustain SMEs taking a sustainable and climate-neutral direction. The InvestEU programme will contribute to improving the companies' cash flow and credit rating, equity capital, and entrepreneurial financing expertise.</p>
Malta	<p>The InvestEU programme, as in the other cases mentioned above, should support SME competitiveness under PO1. It should facilitate access to finance, increase entrepreneurship and investment, expand and move up the value chain, increase/maintain employment, and increase/improve business infrastructure. The ERDF resources contributing to InvestEU shall be used to provide part of the EU guarantee under the Member State compartment. EUR 9.5 million from the ERDF resources will be allocated to InvestEU for budgetary guarantees providing capital relief. The contribution to the InvestEU programme should be dedicated to infrastructural projects that are socially oriented, energy efficient and environment friendly. In addition, the possibility of setting up additional financial instruments under the various funding programmes will be explored through the Malta Development Bank, which offers financing facilities for productive and viable operations which the market is unable or unwilling to accommodate. Given the positive experience under the SMEs under the 2014-2020 Operational Programme, the MS decided to take advantage of Article 14 of the CPR. The analysis showed that enterprises in Malta are open to the</p>

flexibility of financial instruments, and the positive performance provides the necessary impetus for further support in the future.

Source: Consortium elaboration

3.4.4. Potential benefits and obstacles of transfers

The analyses of the information collected through the interviews indicate that authorities were generally involved in decisions to approve financial transfers at the PA level. Another notable aspect is that most MAs are neither contemplating pursuing additional financial transfers at this phase of the programme implementation, namely the initial phase of implementation nor are they sure about making use of this option in the future.

The benefits and obstacles of these financial transfers, as described by the programme authorities, can be broadly summarised as follows:

Benefits	Obstacles
<p>Financial transfers can be used as tools to enhance the efficient implementation of planned projects, contributing to increased absorption. Therefore, additional flexibility is welcome to facilitate changing needs and situations. This benefit is especially poignant for the programme closure stage when the transfer mechanism can help to reallocate unused funds at the end of the financial period.</p> <p>Another benefit, pointed out by an interviewee from Croatia, is the need to ensure continuity from the previous programming period (2014-2020), sometimes to guarantee the completion of projects already initiated. This is especially true for Cohesion Policy funds. Transfers can be a functional tool to guarantee continuity for projects supported by Cohesion Policy funds and EU funds and instruments.</p>	<p>Since the scope of the financial transfer is limited in some MSs by the country's comparatively modest budget for Cohesion Policy programmes, this mechanism is rarely contemplated.</p> <p>Limited experience with the mechanism of financial transfers can hamper their use. Moreover, the complexity of the mechanism involving multiple actors is perceived as an additional obstacle. Lessons from the HE transfers indicate a need for better dissemination of information to understand the full range of benefits and drawbacks associated with financial transfers.</p>

3.5. Insights on synergies

This section summarises the main findings of the analysis on synergies. It includes three parts:

- The first part examines whether there is a substantial difference between the synergies identified during the programming phase and the outcomes of

interventions (identified through the interviews) focusing on the early implementation phase.

- The second part illustrates the benefits of synergies.
- The third part lists the obstacles encountered by the programme authorities in building synergies, as well as the potential facilitating factors.

3.5.1. Differences in synergy identification between the programming phase and implementation phase

Among the selected programmes analysed, only a minority show substantial differences between the synergies identified in the programming phase and those detected during the early stage of the implementation phase. It is crucial to note that this discrepancy is minimal. Furthermore, programme authorities have emphasised that mechanisms and tools to encourage synergies are currently being developed. However, it is noted that when the identification of synergies is not adequately addressed during the programming phase, achieving this in the later stages of implementation is significantly more challenging.

When explicitly considering synergies among CPR programmes, the number of programmes with significant differences between the design and the (early) implementation phase is marginal.

Similarly, when examining the synergies with EU funds and instruments, the scenario remains consistent. Only a few programmes show any significant difference between the programming and the (early) implementation phase.

Additional findings emerge from the analysis of interviews. According to the respondents, the programming phase plays a relevant role in fostering synergies, both in the context of the PA and within the framework of the CPR during programme drafting. Specifically, the programming phase:

- encompasses consultations with stakeholders, providing an initial understanding of the gaps that the programme cannot fill independently, thereby highlighting the necessity for synergies;
- involves strategic discussions with other national and regional programme authorities, European Commission officers, and authorities managing other EU funds, further shaping the programme's strategic direction;
- also clarifies the scope for interlinking projects with other funding sources as the design of actions and specific objectives become more defined.

Should the identification of synergies not be adequately addressed during the programming phase, achieving this in the later stages of implementation proves to be significantly more challenging. The crucial nature of programming is further reinforced by the consistency observed between the design and implementation phases (the focus of this section) and the overall outcomes of the interviews.

3.5.2. Potential benefits perceived by the Programme Authorities

Firstly, numerous programme authorities noted that synergies, and specifically demarcation among funds, help prevent double funding, overlapping, and unproductive competition among funds. It was also emphasised that thanks to the synergies, beneficiaries maximise the effects of interventions by better planning resources from various programs/instruments. This aligns with the necessity for strategic programme design, as highlighted by many programme authorities.

It was emphasised that planning interventions with envisioned synergies is more feasible when included within a broader strategic national or regional framework. This approach ensures long-term, strategic thinking conducive to synergies. Reflecting on modalities, it was observed that long-term planning, as adopted in the 2014-2020 programming period, has proven effective in ensuring adaptability to changing needs. For instance, in the Slovenian EU Cohesion Policy Programme 2021-2027 (ERDF/ESF+/CF/JTF), all ministries and institutions identified co-financing areas under each programme during the programming period. This facilitated the preparation of selection criteria and the implementation of calls for tenders and operations, thereby avoiding duplication and optimising fund utilisation.

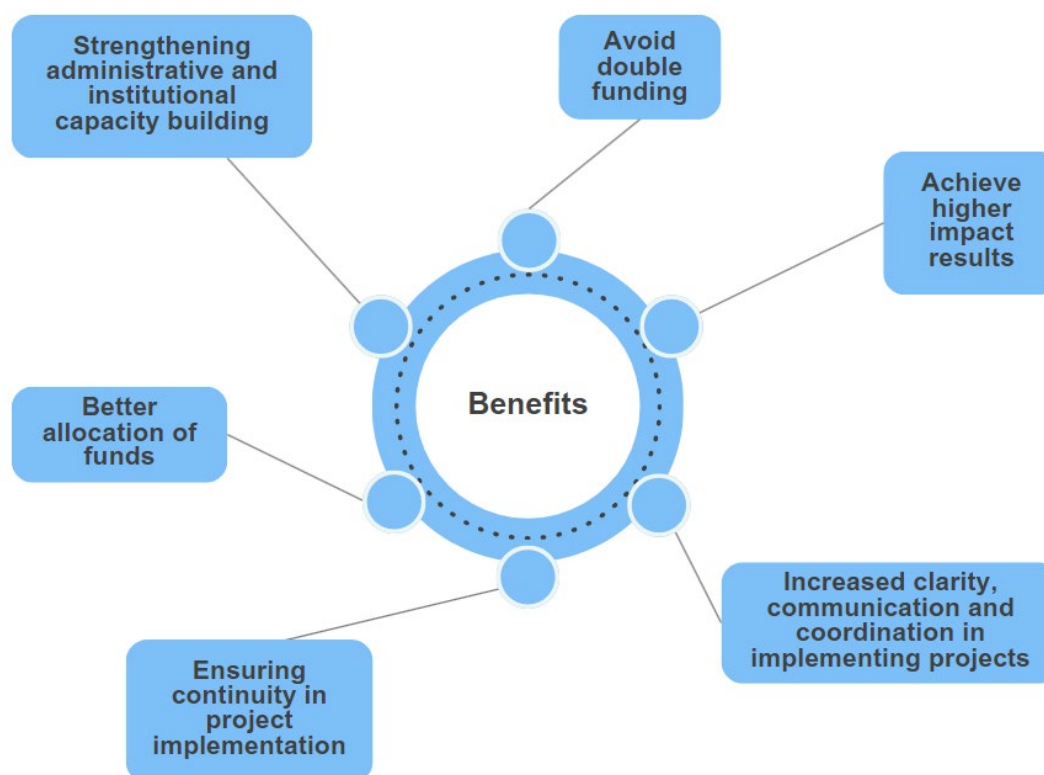
The second key element is the potential to leverage resources for projects from various sources. This pertains to timing, as specific funds can be utilised at the most appropriate stage of a project's life cycle. This can also ensure continuity in complex projects beyond the programming period, with different sources utilised at different phases. Additionally, a synergistic use of funds implies a more financially significant budgetary allocation, thereby amplifying the programme's outcomes and extending its scope. As summarised by a Greek authority, the advantages of the mechanisms involve developing synergies to finance and complete actions from more than one fund, provided these are eligible.

As noted by an Estonian authority, synergies among funds offer the flexibility to overcome specific fund limits. For example, where rules of thematic concentration restrict or exclude certain interventions, having access to other funds enhances measures requiring more focus and funding in the coming years.

Moreover, seeking synergies fosters inter-institutional cooperation and knowledge transfer among officers from different MAs, directly benefiting capacity building.

Ultimately, according to the respondents, resource optimisation, leveraging financial resources, flexibility, and strategic planning lead to greater and more impactful results.

Figure 10. Benefits of planning and implementing synergies



Source. Consortium elaboration

3.5.3. Costs and obstacles of synergy implementation

When examining the challenges and potential obstacles in designing and implementing synergies, the following key elements emerged from the interviews:

- The most frequently mentioned obstacles are the **administrative burden** and the increased technical and human costs. Designing and planning synergies require cooperation and coordination among the various authorities involved in fund implementation.
- **Timing is another significant factor:** planning synergies is time-consuming for programme authorities, especially in the absence of mechanisms that facilitate the design of synergies during the programming phase. Thus, there is a need to develop coordination mechanisms and create a 'synergies database' to streamline the process.
- Although different sets of rules governing the funds and their unique features offer the flexibility to support various interventions, even within the same operation, the **complexity of these different regulations** impedes the creation and implementation of synergies.

The box below reports the MAs' comments on the obstacles.

Box 44. Potential obstacles and difficulties in implementing synergies

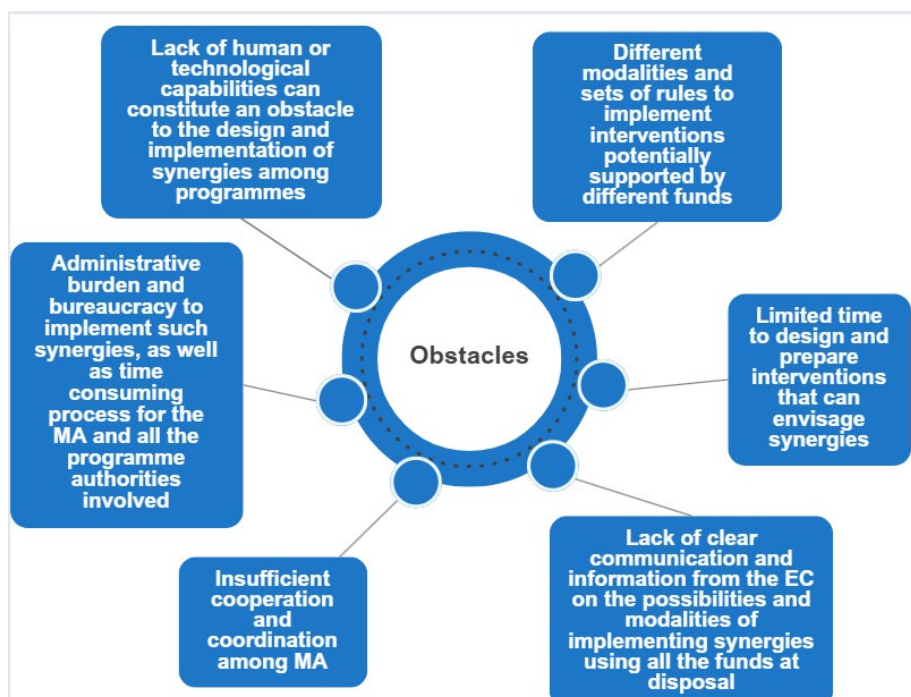
The MAs of the PR - Towards a Smarter, Well-Connected, and Resilient Economy, a Greener Environment and an Integrated Society in **Malta** and the PR Southern, Eastern, and Midland Regional Programme in Ireland emphasise that the primary difficulties in implementing synergies among funds stem from the diverse set of rules governing each fund. This variation in regulations poses significant challenges for aligning and coordinating efforts across different funding streams.

The MA of the Pluri-regional Programme ERDF 2021-2027 in **Spain** highlights the challenge of the potential for overlapping, given that many funds target similar areas. A key concern from a management perspective is the risk of double financing. This necessitates the establishment of clear guidelines to prevent certain institutions from exploiting multiple funds for the same purpose, ensuring that each fund is utilised for its distinct and intended objectives.

In contrast, the MA of the **French** PR Île-de-France and Bassin de la Seine - ERDF/ESF+, as well as that of the PR Sud – Provence Alpes-Côte d'Azur – ERDF-ESF+-JTF in France, point out that the main barrier to designing and implementing synergies is time. MAs are required to invest considerable time and effort in planning and coordinating these synergies. This time-intensive process involves not only the alignment of different funding rules and objectives but also intricate coordination among various stakeholders to ensure that the synergies are effective and yield the desired outcomes. The challenge is, therefore, twofold: ensuring that synergies are both strategically sound and operationally feasible within the constraints of time and resources available to MAs.

Source: Consortium elaboration

Figure 11. Obstacles in synergies building



Source: Consortium elaboration

3.5.4. Facilitating factors in relation to synergy

The interviews with MAs also highlighted specific elements and factors that facilitate synergies among funds.

Firstly, **programmes utilising multiple funds** demonstrate a higher intensity of synergies. This is attributed to the nature and structure of these programmes, which inherently incorporate interactions among the planned interventions.

Secondly, the **intensity of synergies is notably greater in programmes governed by the same MA**. Common governance fosters smoother interactions among responsible bodies in charge of programme implementation, leading to more structured and continuous coordination and greater reactivity. This trend is observed predominantly in MSs with a more centralised institutional setup.

Furthermore, **certain elements act as catalysts for enabling synergies and interactions among funds and programmes**. One element is the Integrated Territorial Strategies (ITS) and the related Integrated Territorial Investments (ITI), which serve as pivotal policy tools in promoting the creation of synergies. This is exemplified in the case of the PR Development of Regions in Bulgaria, supported by the ERDF and the JTF. As noted by the MA, ITI is an instrument that enables multi-fund investments through the ESF+, ERDF, and others, as well as between programs within Bulgaria. In this particular case, the ITS facilitates the funding of both infrastructural measures (through the ERDF) and intangible measures (Human Resource Development - ESF+ Programme).

The ITS is a policy tool that incorporates both bottom-up and top-down approaches. In the bottom-up approach, regional and local actors are actively involved in proposing and developing projects. Conversely, the top-down approach is characterised by the MA's role as a 'strategic coordinator' during the implementation phase. Furthermore, the MA provides strategic guidance and ensures alignment with national priorities for regional development. This dual approach enhances the effectiveness of the ITS, allowing it to serve as a bridge between various levels of governance and ensuring that local needs and priorities are aligned with broader strategic objectives.

4. Conclusions and recommendations

The study's methodology is structured into three key steps to ascertain complementarity among CPR funds and between CPR funds and other EU funds and instruments:



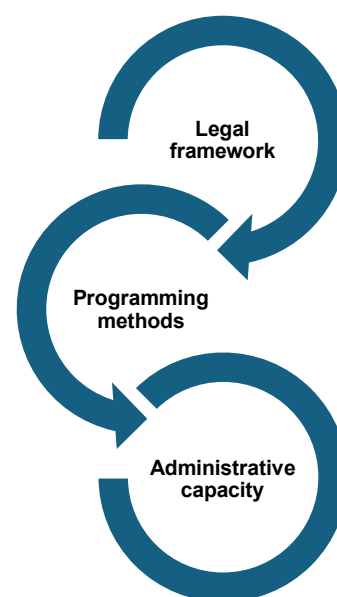
The outcomes of these three steps are:

- High level of **overlap** across most policy areas, particularly those concerned with the twin transition.
- **Coordination** varies significantly: it is intense and relatively well-structured among CPR funds, with ERDF and ESF+ playing crucial roles in interlinking different funds under a shared programming framework. The MC enhances this by involving various stakeholders and facilitating communication and information sharing. However, it is more challenging with the NRRPs, supported by the RRF, and other EU funds and instruments, although CPR funds sometimes achieve efficient coordination with HE and LIFE.
- **Synergies**, reflecting the intensity of coordination mechanisms, are stronger among CPR funds than with NRRPs and other EU funds and instruments.

The study has identified three dimensions in achieving effective coordination and synergies:

- An important factor is to establish a **harmonized and coherent legal environment**. Each fund introduces its own specificities and exceptions, resulting in a proliferation of norms and rules that ultimately lead to burdens and uncertainty. Therefore, the creation of new / continuation of existing funds must be carefully assessed. Even with the CPR's efforts toward a unified approach, the presence of multiple distinct funds is often perceived as adding complexity. This can divert the focus and energy of programme authorities away from their core mission: fostering economic and social development and ensuring its sustainability.

- Beyond the legal framework, the inherent nature of Cohesion Policy, which addresses economic, social, urban, and regional issues, requires the integration of various sectors, actors, and policy tools. This necessity for complementarity stems not only from the existence of multiple instruments or funds but



also from the policy itself, which requires a multisectoral and integrated approach, as well as multi-governance. The **programming method** is crucial for integrating these different sectors, actors, and policy tools, and ensuring unified and coordinated efforts.

- Moreover, this programming method encompasses **several administrative and institutional capacities** essential for effective policy design and implementation: identifying needs and resources, formulating an integrated development vision, designing and managing diverse instruments across contexts, aligning interests, and involving stakeholders. While these capacities are present within national and regional administrations, they are often constrained in both quality and quantity, highlighting the need for enhanced capability and better resource allocation to effectively fulfil the ambitions of Cohesion Policy.

Therefore, in short, complementarity requires three mutually supportive factors: a harmonized framework, a programming method, and the capacity to effectively apply it.

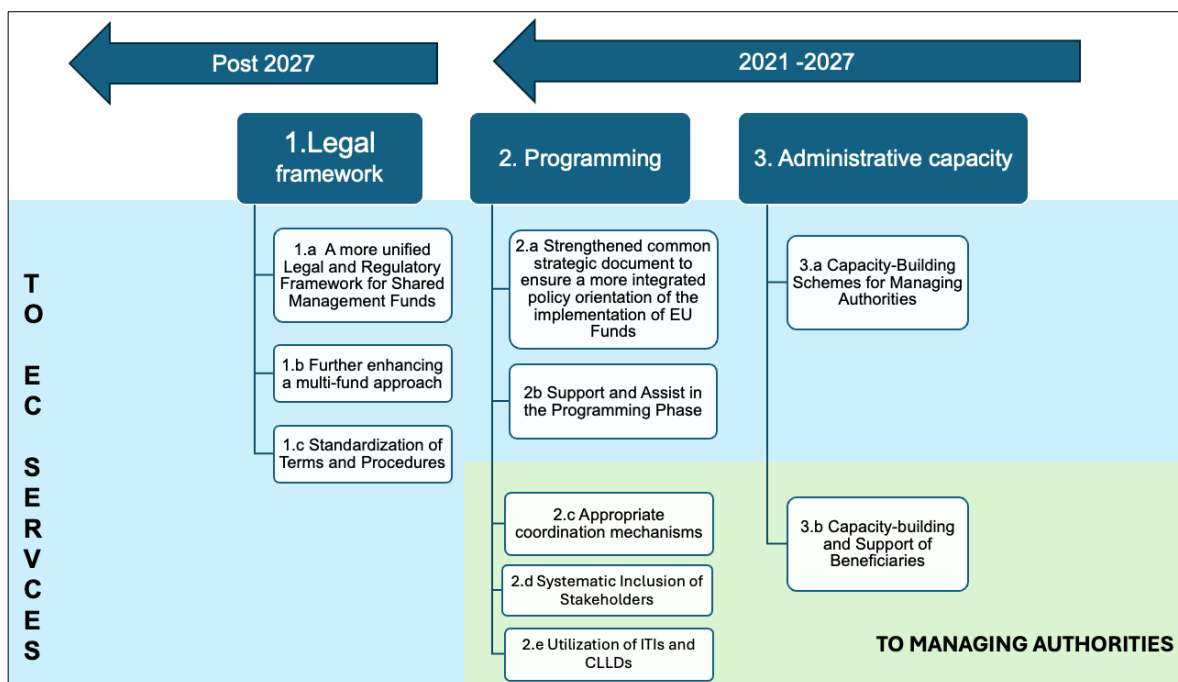
Overall, the outcomes of the study demonstrate that CPR funds, and especially the Cohesion Policy funds, are already capable of establishing complementarity among themselves and with other EU funds and instruments, particularly with the NRRPs supported by the RRF. The main added value of Cohesion Policy in achieving complementarity is through the programming method. When done meticulously at the early stages of the programming cycle through the setting of PA and national and regional programmes, coordination mechanisms are established (e.g. monitoring committee), and synergies are built that align with the objectives and are strictly linked to the strategy and vision (e.g. ITI and CLLD). In other words, complementarity is inherently achieved by Cohesion Policy through its programming method because it becomes embedded within it. Upstream in the process, it is easier to establish links with other instruments and complement each other. Downstream, it becomes more burdensome because it may require readapting the programming strategy or changing coordination routines. Partial evidence of limited synergy not embedded in programming is seen in the marginal exploitation of resource transfers. MAs of CPR programmes rarely use this option and do not anticipate future use. Beyond the Seal of Excellence, CPR programmes infrequently use ad-hoc mechanisms (like cumulative funding) to create synergy. All in all, while establishing complementarity is naturally integral to the Cohesion Policy programmes methodology, seeking it during implementation or through specific instruments (especially transfers) is perceived as an additional burden requiring more effort from the administration. Thus, Cohesion Policy itself is a framework for complementarity.

Indeed, for over 40 years, Cohesion Policy has consolidated the capacity of national and regional authorities to identify needs, formulate visions, and design strategies. Existing mechanisms, such as PAs, programmes and MCs, allow for this seamless exercise rather than ad-hoc administrative mechanisms that take place later in the implementation phases. A partial exception is the territorial strategies, which, even if carried out in the implementation phase, become natural catalysts for complementarity in a 'bottom-up' rather than top-down manner as in the programming phase.

Despite the Cohesion Policy programming method and its governance framework supporting complementarity, challenges remain due to the fragmentation of funds and the diversity of legal frameworks, alongside constraints in administrative capacity, both in quality and quantity. Recommendations are primarily structured around these two limiting factors.

Based on the three factors identified, the recommendations have been organized into three clusters: the first aims to bring harmonisation and simplification to the legal framework, the second could enhance the Cohesion Policy programming method, and the third focuses on possible tools to increase administrative capacity. The first cluster targets the Commission's

services and is specifically designed for the post-2027 programming period. The second and third clusters are intended to influence both the Commission and MAs within the current programming period.



More in detail the recommendation clusters are described below:

Cluster 1: Simplification and Harmonization of Regulations

Objective: Streamline and unify regulations to facilitate more efficient management and implementation of funds.

1.a A more unified Legal and Regulatory Framework for Shared Management Funds: Establishing a common legal framework is helpful for enhancing complementarity. The recommendation is to evolve the CPR into a more cohesive regulatory framework that integrates all EU funds under shared management. This will reduce administrative burdens and foster streamlined operations. This recommendation targets the EC services.

1.b Further enhancing a multi-fund approach as a standard for shared management when different shared management Funds target the same region (or sector at the national level). Having one **programme, managed by a single authority**, could reduce overlap and enhance synergistic opportunities. Additionally, streamlining the architecture of EU funding could help simplify its use, both for managing authorities and beneficiaries. This recommendation targets the EC services.

1.c Standardization of Terms and Procedures: Adopt a more standardized terminology and procedures across all EU funding sources (shared, direct and indirect management) as well as a **common guidance** to facilitate the establishment and execution of synergies and complementarities. As shown in the findings, financial transfers to other EU Funds and instruments in direct and indirect management as well as cumulative funding have only been used in a few cases. The variance in definitions and procedures between funds poses challenges and incurs additional costs. A good practice example is the Commission Notice on the Synergies between Horizon Europe and ERDF programmes ⁽⁸⁷⁾, which, despite its

⁽⁸⁷⁾ Commission notice 2022/C 421/03, OJ C 421.4.11.2022))

limited use—likely due to timing—already serves as a concrete guide to complementarity beyond HE and ERDF. This recommendation targets the EC services.

Cluster 2: Enhanced upstream Policy Integration – from programming to implementation

Objective: Ensure robust programming that integrates various EU -and national-policies and instruments, extending beyond EU funds to promote broader policy integration.

2.a Strengthened common strategic document aiming at ensuring a more integrated policy orientation of the implementation of EU Funds: built on a thorough needs analysis (at national, regional, and sectoral levels as appropriate) while taking account of European priorities, and outlining mechanisms for collaboration among various funds and programmes, including with national, regional, and sectoral strategies and plans. The design of such a common strategic document and framework is pivotal in ensuring upstream in-built complementarities and in setting up coordination mechanisms to ensure synergies adapted to the targeted territory. Good programming leads to complementarity, i.e., complementarity works when it aligns with the programme objectives. This would also enhance ownership of the programmes by managing authorities and monitoring committees. This recommendation targets the EC services.

2.b. Support and Assist in the Programming Phase: despite an early start of the preparations of the 2021-2027 programming period, the preparation timeframe was compressed due to the simultaneous design of NRRPs and reprogramming of the 2014-2020 cohesion policy programmes to help face the crises, which significantly hindered the ability to identify complementarities. It would be helpful to ensure adequate preparation time and provide additional support. Promoting the use of **ex-ante evaluations**, examining the coherence at both vertical and horizontal levels, could help enhance strategic planning and resource allocation, ensuring that programmes align with broader EU policy objectives. This recommendation targets the EC services.

2.c. Appropriate coordination mechanisms: Effective coordination at the central level is a prerequisite for achieving complementarity among different programmes, especially in contexts where both national and regional levels are involved. This can be facilitated by establishing coordination bodies, dedicated sectoral interinstitutional/ interdepartmental structures and working committees, specific guidance documents, without forgetting informal coordination networks to enable a more responsive and fluid exchange among stakeholders. In particular, **Monitoring Committees** serve as a useful mechanism to enhance institutional coordination across different sectors and levels, as well as representatives from various EU programmes and instruments. It helps to ensure comprehensive policy alignment and optimisation of funds utilization. The Monitoring Committee's composition, featuring a broad array of stakeholders from different funding streams and programme areas, facilitates an exchange of information and collaborative strategy development. In addition, unified information and management systems with the creation of common **database** -or the better exploitation and interlinkage of existing databases- (for example between cohesion policy funds and HE) would help foster synergies –while preventing double funding. This recommendation targets the managing authorities.

2.d. Systematic Inclusion of Stakeholders: It would be important to involve stakeholders during both the programming and implementation phases, and to **establish specific fora to inform them** about synergy mechanisms and funding opportunities for enhancing complementarity. This recommendation targets the managing authorities.

2.e Utilization of ITIs and CLLDs: the use of Integrated Territorial Investments (ITIs) and Community-Led Local Development (CLLD) strategies could be expanded to include more EU funds and instruments. This approach may encourage local authorities to foster complementarity among different EU funding opportunities, enhancing the overall effectiveness and impact of regional and local development strategies. This recommendation targets the managing authorities.

Cluster 3: Capacity Building and Support

Objective: Enhance the capabilities of Managing Authorities and beneficiaries through targeted assistance and by leveraging existing tools to foster complementarity.

3.a Capacity-Building Schemes for Managing Authorities. Lack of capacities in terms of quality and quantity and at both administrative and institutional level is a recurrent limit to achieve complementarity. Thus, strengthening capacity-building initiatives that would also serve as platforms for sharing and testing synergies and coordination strategies is crucial to enhance the competencies of Managing authorities' staff through existing frameworks like REGIO Peer2Peer Communities or new transnational networks. A concrete tool can be a factsheet on complementarity that encompasses the terminology and best practices from the study, serving as a low-cost resource for training and enhancing understanding among stakeholders. This recommendation targets the EC services.

3.b. Capacity-building and Support of Beneficiaries. Synergies are mainly achieved by beneficiaries therefore providing targeted technical assistance to help beneficiaries is important, complementing technical guidance with appropriate capacity-building activities. The beneficiaries could be incentivized not only to make use of the resources of the same programme but also to explore and use opportunities from other programmes, enhancing the effectiveness of fund utilization. Encouraging beneficiaries to leverage opportunities from other programmes by adopting more effective awarding criteria can serve as a practical tool. So far, the use of incentives to promote synergy beyond individual programmes has not been systematically implemented. However, increasing their use could significantly enhance the effectiveness and reach of these initiatives. This recommendation targets the managing authorities.

Annexes A – Methodological annexes

These annexes include tables elaborated for the scope of the analysis, namely for policy overlap, coordination and synergy assessment.

Annex A1- Cross-matching table of Policy areas, the CPR policy objectives and the RRF Pillars Regulation and synergy definition

For the policy overlap analysis, the Core Team identified 12 policy areas based on a cross matching of the Specific Objectives (as defined by Art. 3 of the ERDF-Cohesion Fund Regulation, Art. 4 of the ESF+ Regulation), the CPR policy objectives (Art. 5 of CPR ⁽⁸⁸⁾) and the RRF Pillars Regulation: 1. Research and Innovation; 2. Digital connectivity; 3. SMEs competitiveness; 4. Green transition; 5. Climate change and adaptation; 6. Transport networks and urban mobility; 7. Employment and the labour market; 8. Education, training and skills; 9. Access to social services; 10. Access to the healthcare system; 11. Integration of third-country nationals, including migrants, refugees, asylum seekers; 12. Local and urban development (e.g. mobility and transport).

Table 23. Cross-matching table of Policy areas, the CPR policy objectives and the RRF Pillars Regulation

POLICY OBJECTIVES (CPR)	POLICY AREAS	SPECIFIC OBJECTIVES	RRF PILLARS
A more competitive and smarter Europe by promoting innovative and smart economic	1 - Research and Innovation	SO 1.1 Developing and enhancing research and innovation capacities and the uptake of advanced technologies	Digital connectivity + Smart, sustainable and inclusive growth
	2 Digital Connectivity	SO1.2 Reaping the benefits of digitisation for citizens, companies, research organisations and public authorities	

⁽⁸⁸⁾ This article do not apply to the HOME Funds.

Strategic coordination and financial complementarity of CPR Funds with other Instruments

transformation and regional ICT connectivity	3 SMEs competitiveness	SO 1.3 Enhancing sustainable growth and competitiveness of SMEs and job creation in SMEs, including by productive investments	
		SO 1.4 Developing skills for smart specialisation, industrial transition and entrepreneurship	
		SO 1.5 Enhancing digital connectivity	
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	4 Green transition	SO 2.1 Promoting energy efficiency and reducing greenhouse gas emissions	Green transition
	5 Climate change and adaptation	SO2.2 Promoting renewable energy in accordance with Directive (EU) 2018/2001, including the sustainability criteria set out therein	
		SO 2.3 Developing smart energy systems, grids and storage outside the Trans-European Energy Network (TEN-E)	
		SO 2.4 Promoting climate change adaptation and disaster risk prevention, and resilience, taking into account eco-system based approaches	
		SO 2.5 Promoting access to water and sustainable water management	
		SO 2.6 Promoting the transition to a circular and resource efficient economy	
		SO 2.7 Enhancing protection and preservation of nature, biodiversity and green infrastructure, including in urban areas, and reducing all forms of pollution	
A more connected Europe by enhancing mobility	6 Transport networks and urban mobility	SO 3.1 Developing a climate resilient, intelligent, secure, sustainable and intermodal TEN-T	Green transition
		SO 3.2 Developing and enhancing sustainable, climate resilient, intelligent and intermodal national, regional and local mobility, including improved access to TEN-T and cross-border mobility	
A more social and inclusive Europe implementing the	7 Employment and labour market	SO 4.1 Enhancing the effectiveness and inclusiveness of labour markets and access to quality employment through developing social infrastructure and promoting social economy	Social and territorial cohesion+ Policies for the next generation,

Strategic coordination and financial complementarity of CPR Funds with other Instruments

European Pillar of Social Rights	8 Education, training and skills	SO 4.2 Improving equal access to inclusive and quality services in education, training and lifelong learning through developing accessible infrastructure, including y fostering resilience for distance and on-line education and training	children and youth, including education and skills
	9 Access to social services	SO 4.3 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	
	10 Access to health care system	SO 4.4 Promoting the socio-economic integration of third country nationals, including migrants through integrated actions, including housing and social services	
		SO 4.5 Ensuring equal access to healthcare and fostering resilience of health systems, including primary care, and promoting the transition from institutional to family-based and community- based care	
	11. Integration of third-country nationals, including migrants, refugees, asylum seekers	SO 4.6 Enhancing the role of culture and sustainable tourism in economic development, social inclusion and social innovation	
A Europe closer to citizens by fostering the sustainable and integrated development of all types of territories and local initiatives	12 local and urban development (exc. Mobility and transport)	SO 5.1 Fostering the integrated and inclusive social, economic and environmental development, culture, natural heritage, sustainable tourism, and security in urban areas	Social and territorial cohesion + Smart, sustainable and inclusive growth
		SO 5.2 Fostering the integrated and inclusive social, economic and environmental local development, culture, natural heritage, sustainable tourism and security in areas other than urban areas	

Source: Consortium elaboration

The table below delineates six synergy typologies within four macro categories, complete with examples. Where relevant, the 'regulatory basis' column cites specific regulations detailing each synergy type. The classifications 'sequential' and 'combined' are exceptions, as they are not grounded in distinct regulations but were instead developed 'ad-hoc' by the study team to enrich the methodological framework.

Table 24. The classification of synergies

Type of Synergy	Definition	Example	Regulatory basis ⁽⁸⁹⁾
Macro category: Phased The 'Phased Synergy' macro category, encompassing both 'Sequential' and 'Seal of Excellence' synergies, operates on the principle that interventions unfold in distinct stages while adhering to a unified strategic direction and scope. This category ensures that each phase not only aligns with overarching goals but also leverages the accomplishments of previous stages.			
Sequential	It happens when an intervention under one programme/ fund/ instrument is the follow-up of another intervention under another programme/ fund/ instrument, or leads to, or facilitates, another that would not have happened otherwise. In this type of synergies, timing plays a central role: <ul style="list-style-type: none"> - on one hand, the decision to firstly use specific funds to support defined initiatives, and later one other funding sources to support other projects, which complement the overall intervention framework, relies on the funds nature and goals (i.e. AMIF and ESF+); - on the other hand, the decision to sequentially use funds can be based on the decision to accelerate and/or amplify the interventions results (i.e. ERDF and DEP, ERDF and CEF, ERDF and HE). 	An example of sequential synergy can be represented by interventions supported by AMIF and ESF+ programmes. Interventions to support integration of third-country nationals in the new socio-cultural environment is firstly supported by AMIF programme, as it intervenes at the early stage of integration process. Later on, ESF+ funded projects can provide third-country nationals tools and instruments to enter labour market and access quality employment.	Not defined in Regulations

⁽⁸⁹⁾ The regulatory basis for the classification refers to:

- CPR Regulation 2021/1060 laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, the Just Transition Fund and the European Maritime, Fisheries and Aquaculture Fund and financial rules for those and for the Asylum, Migration and Integration Fund, the Internal Security Fund and the Instrument for Financial Support for Border Management and Visa Policy
- Regulation 2021/695 establishing Horizon Europe - the Framework Programme for Research and Innovation, laying down its rules for participation and dissemination
- General Block Exemption Regulation - Regulation (EU) No 651/2014 declaring certain categories of aid compatible with the internal market in application of Articles 107 and 108 of the Treaty
- LIFE Regulation (EU) 2021/783 of 29 April 2021 establishing a Programme for the Environment and Climate Action (LIFE)
- Erasmus+ Regulation (EU) 2021/817 of 20 May 2021 establishing Erasmus+: the Union Programme for education and training, youth and sport
- EU4Health Regulation (EU) 2021/522 of 24 March 2021 establishing a Programme for the Union's action in the field of health ('EU4Health Programme') for the period 2021-2027
- DEP Regulation (EU) 2021/694 of 29 April 2021 establishing the Digital Europe Programme and repealing Decision (EU) 2015/2240

Type of Synergy	Definition	Example	Regulatory basis ⁽⁸⁹⁾
	This type of synergy refers only to sequential interventions within the 2021-2027 programming period.		
Alternative (SoE)	Based on the Commission notice (2022/C 421/03) on Synergies between Horizon Europe and ERDF programmes, Seal of Excellence (SoE) is a quality label awarded by the Commission to a proposal which has been submitted to a competitive call for Project proposals under an EU instrument and that has been judged to comply with the minimum quality requirements ⁽⁹⁰⁾ , but which could not be funded due to budgetary constraints. The SoE allows the same proposal to receive support from other EU funding sources, such as ERDF. Acquisition of SoE does not directly mean that the MA will support that project, it is in fact up to MA decision. In case it happens, this is defined as alternative funding.	An example on alternative synergy relates to the use of the SoE within the framework of ERDF and HE programmes: R&D projects for which no funding is available in HE, but which have been awarded the SoE, can also receive funding from the ERDF programme, based on the positive decision of the MA.	CPR Articles 2(45), 73(4) and Recital (61) HE Articles 2(23), 15(2), 24(4), and 48(7) Erasmus+ Article 32(3) Life Article 16(2) DEP Article 13(1) CEF Article 19(2) General Block Exemption Regulation (GBER) Articles 25a and 25b (State aid)
Macro category: Concurrent			

⁽⁹⁰⁾ The definition of the Seal of Excellence (SoE) written in the table is taken from the CPR Regulation, the Regulation 2021/695 establishing Horizon Europe defines the SoE as: 'a quality label which shows that a proposal submitted to a call for proposals exceeded all of the evaluation thresholds set out in the work programme, but could not be funded due to lack of budget available for that call for proposals in the work programme and might receive support from other Union or national sources of funding;

Type of Synergy	Definition	Example	Regulatory basis ⁽⁸⁹⁾
This category is based on the principle that such synergic interactions unfold simultaneously, aiming to harness and amplify synergies towards a unified goal. Unlike the sequential unfolding in 'Phased Synergy', 'Concurrent Synergy' involves the strategic integration of outputs and/or financial resources from various sources at the same time, thereby aiming to boost the overall effectiveness and impact of the initiatives involved.			
Combined	Combined funding means support (from more than one source of Union budget) to <u>two separate projects/operations</u> linked by a common objective. Support to interventions should be provided <u>in parallel</u> and might have <u>different in nature</u> , e.g., different type of form of support (grant vs. financial instrument). The different interventions' outputs should focus on the same target group to generate a greater added value.	<p>Example of combined synergy can be detected between ERDF and ESF+ programmes: ERDF programmes can support interventions to promote SMEs competitiveness and companies' digitalisation, on the other hand ESF+ can fund trainings for workers on those topics.</p> <p>Another example is combined funding under Horizon Europe Teaming actions, which can become an influential and meaningful bridge particularly between S3 and excellence in R&I. Such actions require complementary funding from a national, regional, EU or private source. The Horizon Europe proposal must include a clear description of the complementary project supported by the ERDF or other funding sources. This description will also be subject to the evaluation undertaken by independent experts according to HE rules and selection criteria. This comes under the new rules with more favourable state aid conditions.</p> <p>AMIF, ISF and BMVI are also an example of combined effect towards the common goal of ensuring the good functioning of the Schengen area.</p>	Not defined in Regulations
Cumulative	Cumulative funding allows to support the same project/operation with funding from two different sources of the Union budget, provided that the funding does not cover the same cost.	<p>Example of cumulative funding can be detected between DEP and ERDF to support European Digital Innovation Hubs.</p> <p>EDIHs are a joint investment of the EU and the MS and the associated countries of Digital Europe Programme. This is reflected in the two-stage selection process described in the DEP Regulation (EU) 2021/694.</p> <p>First, Member States select and shortlist candidate entities. From this list, in a second stage, the Commission selects those entities that will make up the network of EDIHs. The selection is based on criteria of relevance, implementation and impact, but also taking into account geographical, sectorial and</p>	<p>CPR Art. 63(9)</p> <p>HE Art. 15(4)</p> <p>LIFE Art. 16(1)</p> <p>Erasmus+ Art. 32(2)</p> <p>EU4Health Art. 13</p>

Type of Synergy	Definition	Example	Regulatory basis ⁽⁸⁹⁾
		<p>technological coverage objectives, and the available budget per country. DEP co-finances selected grants with a maximum of 50 % and Member States may co-finance the remaining part through ERDF.</p> <p>Another example for cumulative funding is the new possibility to allow contributions from ERDF programmes as national contributions in Horizon Europe partnerships, make it easier to pool ERDF and Horizon Europe funds in co-funded Horizon Partnerships, thereby creating opportunities for the regions to team up with other EU countries and regions to address related smart specialisation priorities.</p>	DEP Art. 23(1)
Macro category: Transfer			
	<p>Member States may request, in the PAs or in a request for an amendment of a programme, a transfer of:</p> <ul style="list-style-type: none"> - up to 5% of the initial national allocation of each Fund to any other instrument under direct or indirect management; - up to 5% of the initial national allocation of each Fund to another Fund or Funds; - an additional transfer of up to 20% of the initial national allocation by Fund between the ERDF, the ESF+ or the Cohesion Fund within the Member State's global resources under the Investment for jobs and growth goal. <p>The Member States whose average total unemployment rate for the period 2017-2019 is under 3% may request such an additional transfer of up to 25 % of the initial national allocation.</p> <p>Member States may allocate, in the PA, an amount of up to 2 % of the initial national allocation for the ERDF, the ESF+, the Cohesion Fund and the EMFAF, respectively, to be contributed to the InvestEU Programme and delivered through the EU guarantee and the InvestEU Advisory Hub in accordance with Article 10 of the InvestEU Regulation.</p> <p>Member States, with the agreement of the managing authority concerned, may further allocate an amount of up to 3 % of the initial national allocation of each of those Funds after 1 January 2023 through one or more programme amendment requests.</p> <p>All in all, the sum of the transfers and contributions shall not exceed 5% of the initial national allocation of each Fund.</p>	<p>At PA level, there are several examples of transfer, both among CPR funds and between CPR funds and EU funds and instruments.</p> <p>Some Member States have also approved contributions to the InvestEU.</p> <p>The new possibility of transfers from ERDF to Horizon Europe is starting to be implemented (EUR 5mn from Malta and 18.5mn from Lithuania)</p> <p>Regarding Erasmus+, the transfer from ESF+ is implemented since 2022 with a total allocation of EUR 57 Mio from Germany, distributed across the entire programming period, until 2027.</p>	<p>CPR Art. 14, 26, 27</p> <p>HE Article 15(5), (6)</p> <p>InvestEU Regulation</p> <p>Erasmus+ Article 17(8)</p>
Macro category: Demarcation			

Type of Synergy	Definition	Example	Regulatory basis ⁽⁸⁹⁾
	<p>It happens when the programme has identified <u>demarcation criteria</u> for interventions having the same nature and the same implementation time, to avoid duplication of similar projects, and double funding. In this case, the programme may indicate that interventions outside of its scope could be financed by another programme/fund/instrument.</p> <p>This is about delineating clear boundaries between various funding sources, without actively engaging in the coordination of actions for enhanced synergy. Demarcation focuses on the preliminary identification of which funding source is most appropriate for specific areas, thereby ensuring streamlined efforts without the active pursuit of integrated, collaborative enhancements.</p>	<p>Example of demarcation can be detected in in ERDF and EMFAF programmes: ERDF can finance sea and river ports, including upgrading and equipment of port infrastructure and digitalization, while EMFAF supports only fishing ports.</p>	<p>Demarcation is not defined in the CPR, but art 11(1) cites demarcation as one of the elements that should be taken into account when elaborating the PA.</p>

Annex A2 – Methodological aspects for the analysis of EU funds and instruments

This annex presents an overview of the methodology used to conduct the analysis of the EU funds and instruments, which started in November 2022. This annex represents the methodology for the document assessment, based on the information collected by the NEs and the analysis carried out by the study team.

The analysis will be based on the screening of:

The **strategic documents**, e.g., the strategic plan of HE: https://www.eeas.europa.eu/sites/default/files/horizon_europe_strategic_plan_2021-2024.pdf

The **Work Programme (2023)**, e.g., for Horizon Europe, the work programme 2023: https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/horizon-europe-work-programmes_en

The current guidance includes three main activities, illustrated in the introduction chapter of this Report:

- Policy overlap analysis.
- Coordination analysis.
- Synergy analysis.

Each EU fund and instrument is assessed through multicriteria analysis encompassing the mapping of policy areas, the coordination assessment and synergy identification. This analysis enables a comparison between the level of overlap, the coordination mechanism, and the forms of synergies. The results of the consistency analysis are depicted in the figure below.

Scoring and weighting. The scoring and weighting process involves quantifying the qualitative judgments for each of the three analyses conducted. The scoring is applied as follows:

- Policy Mapping: When a fund covers a policy area, it is assigned a score of 1. The maximum score for each Fund is 12.
- Coordination Assessment: For each coordination mechanism a score of 1 is assigned. If the mechanism is specific to Cohesion Policy funds, it receives a score of 2.
- Synergy Identification: For each form of synergy a score of 1 is assigned. If the synergy is specific to Cohesion Policy funds, it receives a score of 2.

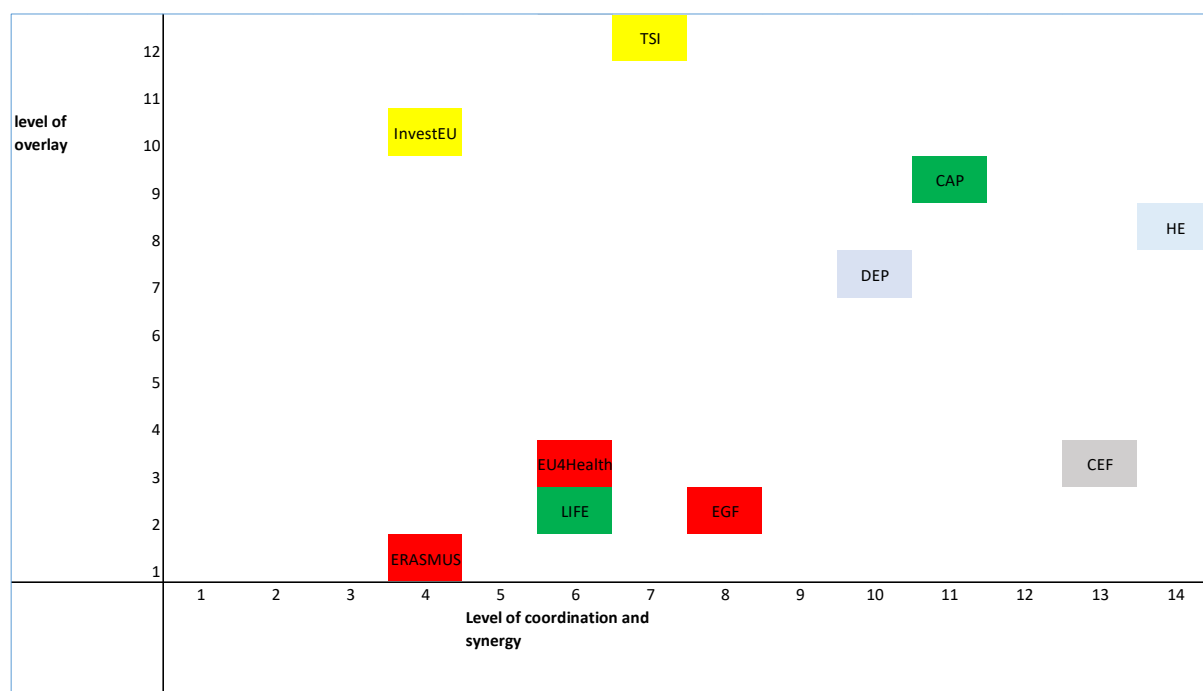
The total score for coordination and synergy is calculated by summing up the individual scores. The table on the next page provides the scoring and weighting for each fund.

Table 25. Table scoring and weighting for consistency check.

	EU FUNDS AND INSTRUMENTS	Level of overlap	Level of synergy	Level of coordination	Level of coordination and synergy
1	Technical Support Instrument (TSI)	12	3	3	7
2	European Agricultural Fund for Rural Development (EAFRD)	9	3	8	11
3	Horizon Europe (HE)	8	9	5	14
4	Connecting Europe Facility (CEF)	3	7	6	13
5	Digital Europe Programme (DEP)	7	8	2	10
6	InvestEU Programme	10	2	2	4
7	LIFE	2	3	3	6
8	EU4Health Programme	3	5	1	6
9	European Globalisation Adjustment Fund (EGF)	2	2	6	8
10	Erasmus+	1	3	1	4

Based on the scoring and weighting, the scatter chart was created (see below).

Figure 12. Scatter charter for the multicriteria analysis



Annex B – Additional information on the analysis of the Partnership Agreements

The table below illustrates the number of MS PAs that envisage using CPR funds to implement interventions in each policy area.

Table 26. Number of MSs planning to use CPR funds for each policy area

Policy area	ERDF	ESF+	CF	JTF	BMVI	ISF	AMIF	EMFAF
R&I	27	11	0	11	0	7	0	12
Digital connectivity	27	9	2	4	6	8	0	6
SMEs competitiveness	27	9	0	12	0	0	0	17
Green transition	27	5	11	18	0	0	0	14
Climate change and adaptation	27	4	10	9	0	1	0	24
Transport networks and urban mobility	23	1	14	5	0	0	0	3
Employment and labour	19	27	1	15	0	0	3	6
Education, training and skills	19	26	0	10	0	0	1	0
Access to social services	19	25	0	0	0	4	1	1
Access to health care system	17	16	0	0	0	0	4	0
Integration of third-country nationals, including migrants, refugees, asylum seekers	5	21	0	0	6	2	22	2
Local and urban development (exc. Mobility and transport)	25	18	4	7	0	0	0	17

Source: Consortium elaboration

The table below illustrates the number of MSs planning to invest EU funds and instruments in interventions in the twelve policy areas identified.

Table 27. Number of MSs planning to use EU funds and instruments for each policy area

Policy area	EAFRD	CEF	DEP	INVESTEU	ERASMUS+	EU4HEALTH	HE	LIFE	EGF	TSI	RRF
R&I	13	0	3	3	2	0	25	1	0	0	16
Digital connectivity	4	4	15	2	0	0	5	0	0	4	18
SMEs competitiveness	10	1	2	2	0	0	2	2	0	0	9
Green transition	5	3	1	0	0	0	5	7	0	4	19
Climate change and adaptation	18	0	0	0	0	0	7	16	0	0	10
Transport networks and urban mobility	0	17	0	2	0	0	2	1	0	0	13
Employment and labour market	4	0	1	0	4	0	0	0	4	0	11
Education, training and skills	4	0	1	0	12	0	1	0	0	0	13
Access to social services	5	19	0	0	2	0	0	0	0	0	9
Access to health care system	0	1	1	0	1	1	1	0	0	0	11
Integration of third-country nationals, including migrants, refugees and asylum seekers	0	0	0	0	1	1	0	0	0	0	0
Local and urban development (exc. Mobility and transport)	15	1	0	1	0	0	2	1	0	0	4

Source: Consortium elaboration

Table 28. Climate change and adaptation' coverage planned by MSs

	EAFRD	CF	EMFAF	ERDF	ESF+	HE	ISF	JTF	LIFE	RRF
AT										
BE										
BG										
CY										
CZ										
DE										
DK										
EE										
ES										
FI										
FR										
GR										
HR										
HU										
IE										
IT										
LT										
LU										
LV										
MT										
NL										
PL										
PT										
RO										
SE										
SI										
SK										

Source: Consortium elaboration

Table 29. 'SMEs competitiveness' coverage planned by MSs

	EAFRD	CEF	DEP	EMFAF	ERDF	ESF+	HE	INVEST EU	JTF	LIFE	RRF
AT											
BE											
BG											
CY											
CZ											
DE											
DK											
EE											
ES											
FI											
FR											

GR												
HR												
HU												
IE												
IT												
LT												
LU												
LV												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Source: Consortium elaboration

Table 30. 'Digital connectivity' coverage planned by MSs

	BMVI	EAFRD	CEF	CF	DEP	EMFAF	ERDF	ESF +	HE	INVEST EU	ISF	JTF	RRF	TSI
AT														
BE														
BG														
CY														
CZ														
DE														
DK														
EE														
ES														
FI														
FR														
GR														
HR														
HU														
IE														
IT														
LT														
LU														
LV														
MT														
NL														
PL														
PT														
RO														
SE														
SI														

SK

Source: Consortium elaboration

Table 31. 'Education, training and skills' coverage planned by MSs

	AMIF	EAFRD	DEP	ERASMUS+	ERDF	ESF+	HE	JTF	RRF
AT									
BE									
BG									
CY									
CZ									
DE									
DK									
EE									
ES									
FI									
FR									
GR									
HU									
IE									
IT									
LT									
LU									
LV									
MT					=				
NL									
PL									
PT									
RO									
SE									
SI									
SK									

Source: Consortium elaboration

Table 32. 'Employment and labour' coverage planned by MSs

	AMIF	EAF RD	CF	DEP	EGF	EMFAF	ERASMUS+	ERDF	ESF+	JTF	RRF
AT											
BE											
BG											
CY											
CZ											
DE											
DK											
EE											
ES											
FI											
FR											
GR											

HR												
HU												
IE												
IT												
LT												
LU												
LV												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Source: Consortium elaboration

Table 33. 'Green transition' coverage planned by MSs

	EAF RD	CEF	CF	DEP	EMFAF	ERDF	ESF+	HE	JTF	LIFE	RRF	TSI
AT												
BE												
BG												
CY												
CZ												
DE												
DK												
EE												
ES												
FI												
FR												
GR												
HR												
HU												
IE												
IT												
LT												
LU												
LV												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Source: Consortium elaboration

Table 34. 'Access to healthcare system' coverage planned by MSs

	AMIF	CEF	DEP	ERASMUS+	ERDF	ESF+	EU4HEALTH	HE	RRF
BG									
CY									
CZ									
EE									
ES									
FI									
FR									
GR									
HR									
HU									
IE									
IT									
LT									
LU									
LV									
MT									
PL									
PT									
RO									
SI									
SK									

Table 35. 'Integration of third-country nationals, including migrants, refugees, asylum seekers' coverage planned by MSs

	AMIF	BMVI	EMFAF	ERASMUS+	ERDF	ESF+	ISF
AT							
BE							
BG							
DE							
EE							
ES							
FI							
FR							
GR							
HR							
HU							
IE							
IT							
LT							
LU							
MT							
NL							
PL							
PT							

RO							
SE							
SI							
SK							

Table 36. 'Research and Innovation (R&I)' coverage planned by MSs

	EAFRD	DEP	EMFAF	ERASMUS+	ERDF	ESF+	HE	INVESTEU	ISF	JTF	LIFE	RRF
AT												
BE												
BG												
CY												
CZ												
DE												
DK												
EE												
ES												
FI												
FR												
GR												
HR												
HU												
IE												
IT												
LT												
LU												
LV												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Table 37. 'Access to social services' coverage planned by MSs

	AMIF	ERDF	ERDF	ERDF	ERDF	ERDF	ERDF	ERDF
	AMIF	ERDF	ERDF	ERDF	ERDF	ERDF	ERDF	ERDF
AT								
BE								
BG								
CY								
CZ								
DE								
DK								
EE								
ES								
FR								
GR								
HR								
HU								
IE								
IT								
LT								
LV								
MT								
NL								
PL								
PT								
RO								
SE								
SI								
SK								

Table 38. 'Transport networks and urban mobility' coverage planned by MSs

	CEF	CF	EMFAF	ERDF	ESF+	HE	INVESTEU	JTF	LIFE	RRF
BE										
BG										
CY										
CZ										
DE										
EE										
ES										
FI										
FR										
GR										
HR										
HU										
IT										
LT										

LU										
LV										
MT										
PL										
PT										
RO										
SE										
SI										
SK										

Table 39. 'Local and urban development (excl. Mobility and transport)' coverage planned by MSs

	EAFR D	CEF	CF	EMFA F	ERDF	ESF+	HE	INVE STEU	JTF	LIFE	RRF
AT											
BE											
BG											
CY											
CZ											
DE											
DK											
EE											
ES											
FI											
FR											
GR											
HR											
HU											
IE											
IT											
LT											
LV											
MT											
NL											
PL											
PT											
RO											
SI											
SK											

Figure 13. Funds used to create synergies in PO1

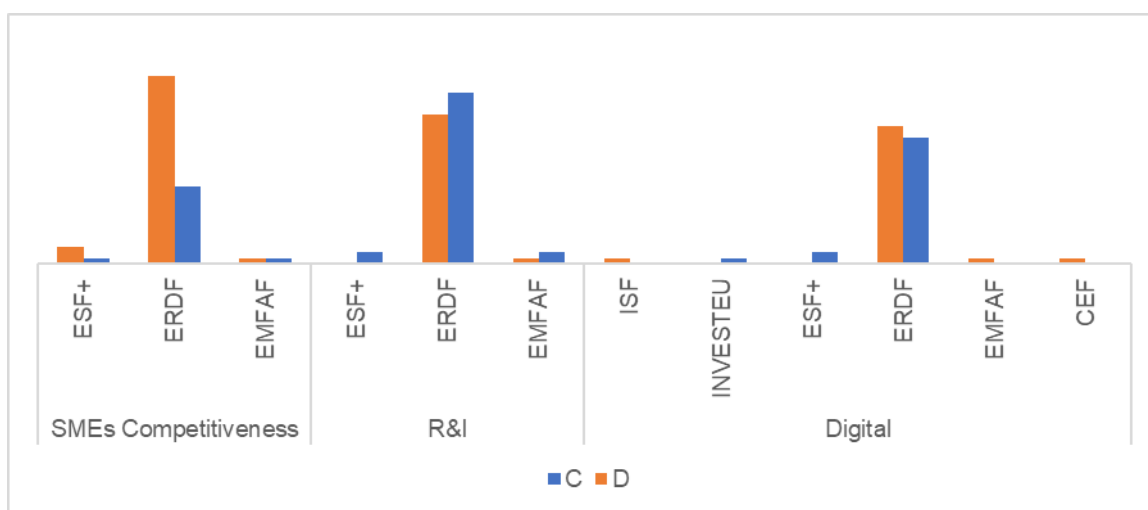


Figure 14. Funds used to create synergies in PO2

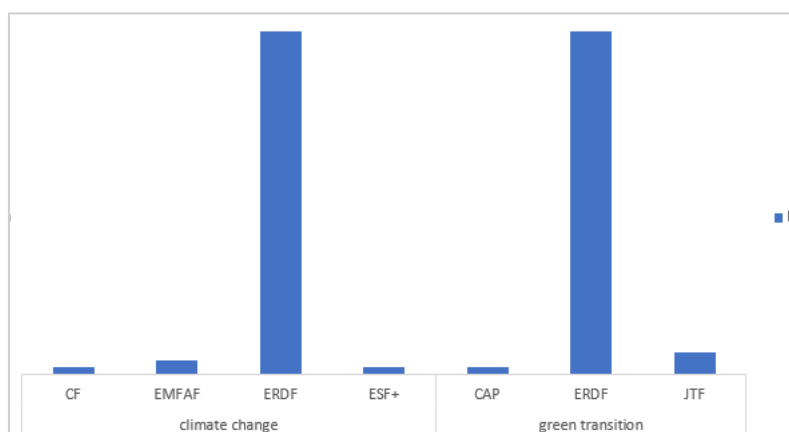


Figure 15. Funds used to create synergies in PO3

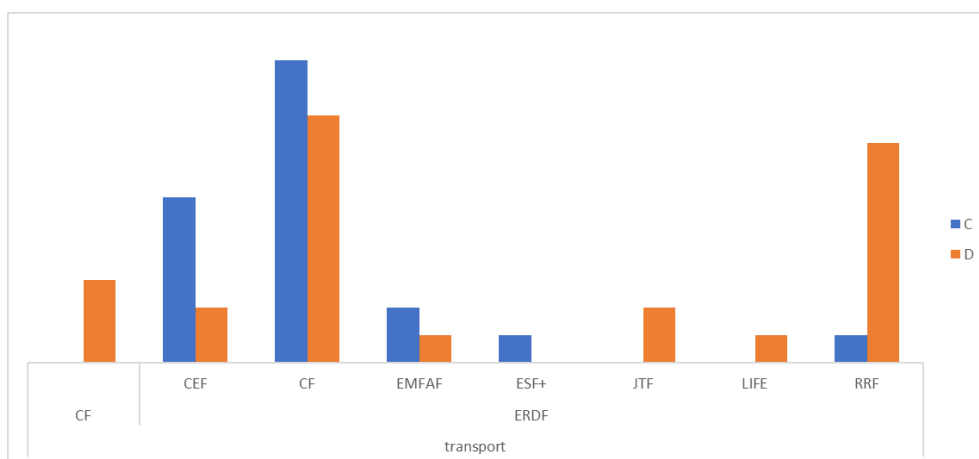


Figure 16. Funds used to create synergies in PO4

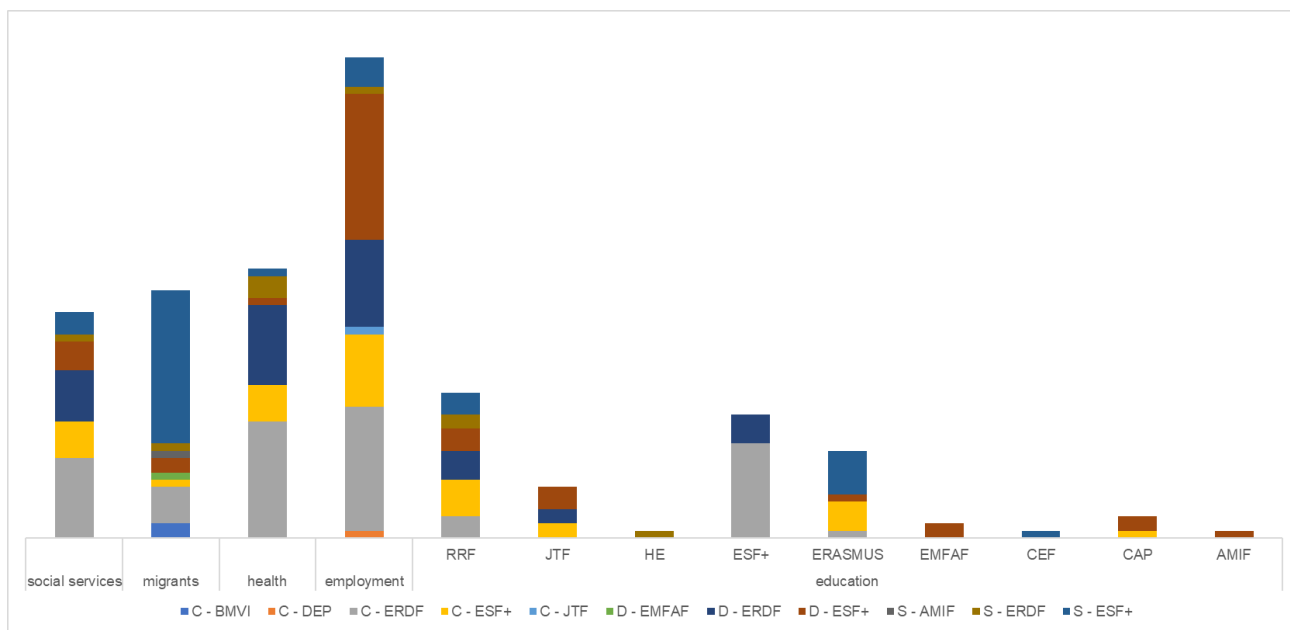
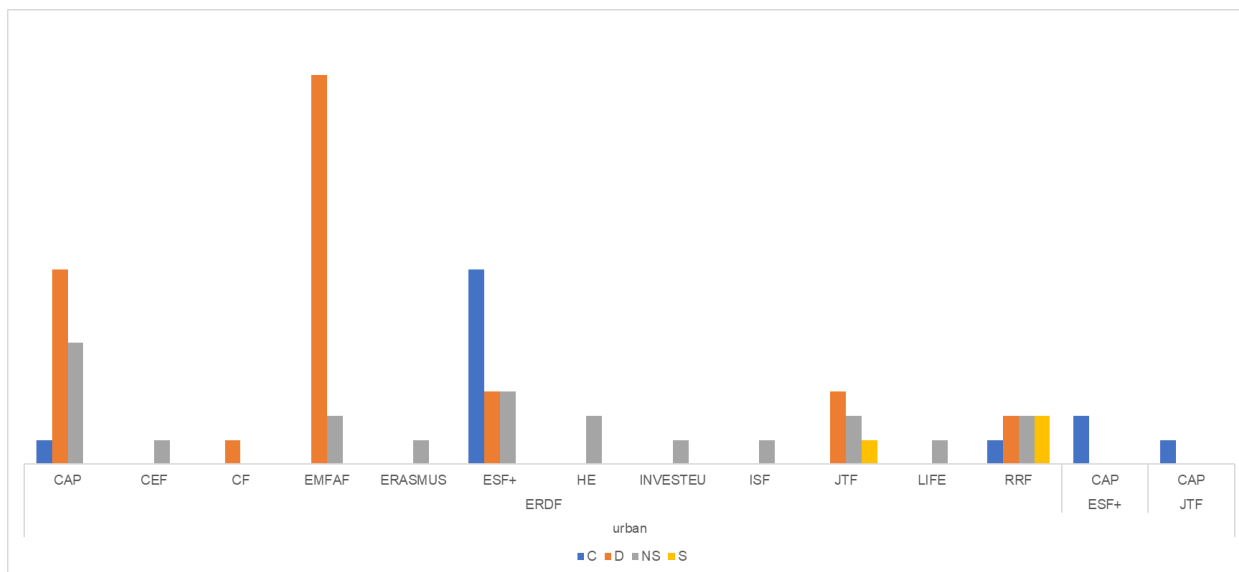


Figure 17. Funds used to create synergies in PO5



Annex C – Additional information on the analysis of the National Recovery and Resilience Plans

	It indicates that both the identification of the beneficiaries and the form of support was found in the NRRP
	It indicates that only the beneficiaries were found in the NRRP
	It indicates that the NRRP intervenes in that policy area, but it does not cite the beneficiary
	It indicates that that specific beneficiary will not be a beneficiary for that specific policy area.

Table 40. NRRP policy area mapping according to PO1 ⁽⁹¹⁾

MS	Larg e enter prise s	SME s	Rese arch centr es / Univ ersiti es	NGO s / Third secto r entiti es	Muni cipali ties	Local publi c instit ution s	Regi onal instit ution s / dev. agen cies	Natio nal instit ution s	Natio nal agen cies	Publi c utiliti es	Fina ncial inter medi aries	Indivi duals
AT												
BE												
BG												
CY												
CZ												
DE												
DK												
EE												
ES												
FR												
FI												
GR												
HR												
HU												
IE												
IT												
LT												
LV												
LU												
MT												
NL												
PL												

⁽⁹¹⁾ According to the study conducted, all MSs consider all RRF pillars in their NRRPs, all except Malta, which does not include the 'Social and territorial cohesion' pillar and the 'Policies for the next generation' pillar in its NRRP.

PT												
RO												
SE												
SI												
SK												

Table 41. NRRP policy area mapping according to PO2 ⁽⁹²⁾

MS	Larg e enter prise s	SME s	Rese arch centr es / Univ ersiti es	NGO s / Third secto r entiti es	Muni cipali ties	Local publi c institut ions	Regi onal institut ions / devel opment agen cies	Natio nal institut ions	Natio nal agen cies	Publi c utiliti es	Fina ncial inter medi aries	Indivi duals
AT												
BE												
BG												
CY												
CZ												
DE												
DK												
EE												
ES												
FI												
FR												
HR												
HU												
GR												
IE												
IT												
LT												
LV												

⁽⁹²⁾ According to the study conducted, all MSs consider all the RRF pillars in their NRRPs, all except Malta, which does not include the 'Social and territorial cohesion' pillar and the 'Policies for the next generation' pillar in its NRRP.

LU												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Table 42. NRRP policy area mapping according to PO3 ⁽⁹³⁾

MS	Large enterprises	SMEs	Research centres / Universities	NGOs / Third sector entities	Municipalities	Local public institutions	Regional institutions / development agencies	National institutions	National agencies	Public utilities	Financial intermediaries	Individuals
AT												
BE												
BG												
CY												
CZ												
DE												
DK												
EE												
ES												
FI												
FR												
GR												
HR												
HU												
IE												

⁽⁹³⁾ According to the study conducted, all MSs consider all the RRF pillars in their NRRPs, all except Malta, which does not include the 'Social and territorial cohesion' pillar and the 'Policies for the next generation' pillar in its NRRP

Strategic coordination and financial complementarity of CPR Funds with EU Instruments

IT												
LT												
LV												
LU												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Source: Consortium elaboration based on survey data

Table 43. NRRP policy area mapping according to PO4 ⁽⁹⁴⁾

MS	Large enterprises	SMEs	Research centres / Universities	NGOs / Third sector entities	Municipalities	Local public institutions	Regional institutions / development agencies	National institutions	National agencies	Public utilities	Financial intermediaries	Individuals
AT												
BE												
BG												
CY												
CZ												
DE												
DK												
EE												
ES												
FI												
FR												
GR												
HR												
HU												
IE												

⁽⁹⁴⁾ According to the study conducted, all MSs consider all the RRF pillars in their NRRPs, all except Malta, which does not include the 'Social and territorial cohesion' pillar and the 'Policies for the next generation' pillar in its NRRP

Strategic coordination and financial complementarity of CPR Funds with EU Instruments

IT												
LV												
LT												
LU												
MT												
NL												
PL												
PT												
RO												
SE												
SI												
SK												

Source: Consortium elaboration based on survey data

Table 44. NRRP policy area mapping according to PO5 ⁽⁹⁵⁾

MS	Large enterprises	SMEs	Research centres / Universities	NGOs / Third sector entities	Municipalities	Local public institutions	Regional institutions / development agencies	National institutions	National agencies	Public utilities	Financial intermediaries	Individuals
AT												
BG												
CY												
CZ												
ES												
FR												
GR												
HR												
IE												
IT												
LU												
NL												
PL												
PT												
RO												

⁽⁹⁵⁾ According to the study conducted, all MSs consider all the RRF pillars in their NRRPs, all except Malta, which does not include the 'Social and territorial cohesion' pillar and the 'Policies for the next generation' pillar in its NRRP

Strategic coordination and financial complementarity of CPR Funds with EU Instruments

SI												
----	--	--	--	--	--	--	--	--	--	--	--	--

Source: Consortium elaboration based on survey data.

Annexes D – Description of the survey data and additional information on the analysis of the CPR funds

Annex D1 - Description of the survey data

This section of the annex provides an overview of the data collected through the document analysis of all the CPR programmes. The document analysis was conducted by the Team of National Experts (hereinafter, NEs), followed by three rounds of quality checks. A total of 395 programmes were analysed, and 536 surveys were completed by the NEs as multiple surveys were needed for the multi-fund programmes. The table below (Table D.1) presents the number of programmes analysed per MS, distinguishing them based on their territorial governance level (national or regional) and whether they are multi-fund programmes. The MSs that do not envisage regional-level programmes are highlighted in blue.

The NEs were asked to classify the documents according to:

Whether the programme was multi-fund or not. In the case of a multi-fund programme, the NEs were asked to indicate which funds financed the programme and to compile a different survey for each fund, in order to provide comprehensive data on each fund.

The NEs indicated also whether the analysed programme was national or regional, depending on the administrative level it covered. Programmes were considered national if they operate in all the regions and/or local administrative entities that compose the MS. On the other hand, programmes were considered regional if they operate in precise regions or local administrative entities.

The analysis of all documents was followed by a rigorous quality check, based on three steps:

1. the first step entailed a check for homogeneity, done by the Core Team, Digital Team and Quality control team.
2. the second round envisaged the RBRT quality check, done by Digital Team and the Core Team, with the support of the National Experts.
3. the third round of quality check represents a sample quality check, done by the Core Team.

More specifically, the Core Team was responsible for the quality check in terms of homogeneity regarding the definition and interpretation of the assessment by the NEs. The support of the digital team and the quality control team also ensured that the data were consistent and free of errors in the classification of the programme documents. A second layer of quality control was ensured by the use of the RBRT instrument which was used to check key terminology regarding EU funds and instruments, as well as the 'Seal of Excellence' indication in every programme document. The results provided summary statistics of the frequency of the identified keywords, this frequency analysis was cross-checked with the synergy identified by the NEs and, where inconsistencies were found, the programme documents were reanalysed. The last layer of quality control was based on a representative sample of programme documents that were reanalysed by the Core Team to ensure consistency with the assessment done by the NEs.

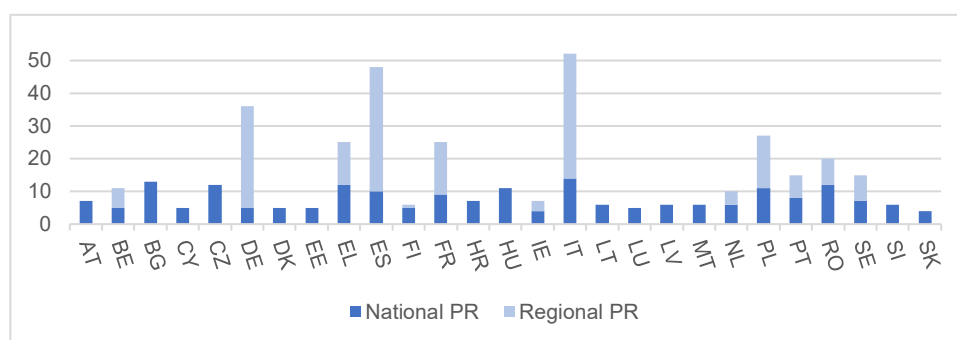
Table 45. Number of programmes analysed by Member State

MS CODE	Member State	National	Regional	Total Programmes	Of which multi-fund	Surveys
AT	Austria	7		7	2	9
BE	Belgium	5	6	11	2	12
BG	Bulgaria	13		13	2	15
CY	Cyprus	5		5	1	8
CZ	Czechia	12		12	4	16
DE	Germany	5	31	36	6	42
DK	Denmark	5		5		5
EE	Estonia	5		5	1	8
EL	Greece	12	13	25	18	44
ES	Spain	10	38	48		48
FI	Finland	5	1	6	2	9
FR	France	9	16	25	17	48
HR	Croatia	7		7	2	9
HU	Hungary	11		11	7	21
IE	Ireland	4	3	7		7
IT	Italy	14	38	52	9	61
LT	Lithuania	6		6	1	9
LU	Luxembourg	5		5	2	7
LV	Latvia	6		6	1	9
MT	Malta	6		6	1	8
NL	Netherlands	6	4	10		10
PL	Poland	11	16	27	17	49
PT	Portugal	8	7	15	8	26
RO	Romania	12	8	20	5	25
SE	Sweden	7	8	15		15
SI	Slovenia	6		6	1	9
SK	Slovakia	4		4	1	7

Source: Consortium elaboration based on survey data (darker rows refers to MS which do not have regional programmes)

Twelve of the MSs have regional programmes, which are either financed by the ERDF, ESF+ or JTF. The classification of regional and national programmes is based on the MA responsible for the implementation of the programme, as well as the geographical boundaries of its intervention. For this reason, according to the study analysis, some programmes are considered 'National' even if their territorial focus of intervention is limited to selected regions. This is the case for example of programmes financed by the JTF and managed at a national level. The number and extent of national and/or regional PRs analysed in each MS is provided in the figure below.

Figure 18. Number of Regional and National programmes analysed, by Member State

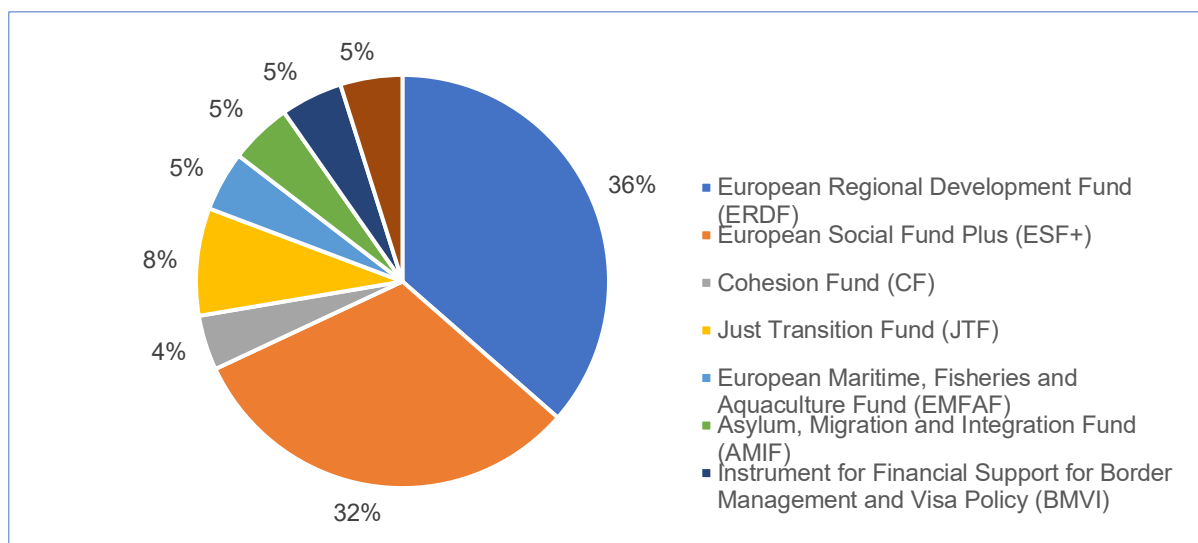


Source: Consortium elaboration based on survey data (sample: all surveys)

The document analysis pertained to all CPR programmes.

The figure below illustrates the distribution of the most frequently utilised CPR funds in European programming, considering all MSs and all programme levels analysed. Most of the programmes analysed are financed by the ERDF or ESF+, the JTF finances interventions in all MSs, except Bulgaria ⁽⁹⁶⁾. The Cohesion Fund intervenes in 15 MSs as foreseen by the CPR Regulation. ⁽⁹⁷⁾ Each MS has also approved one programme for each HOME fund (AMIF, BMVI and ISF), as well as one programme financed by the EMFAF. ⁽⁹⁸⁾ From the analysis of the data, we can observe that not only are the ERDF and ESF+ the most frequently employed funds, but when combined, they account for over half of all European programmes.

Figure 19. Percentage of employed funds in all the programmes analysed



Source: Consortium elaboration based on survey data (all samples)

⁽⁹⁶⁾ Bulgaria had not yet submitted its JTF programmes at the stime of the study.

⁽⁹⁷⁾ Regulation (EU) 2021/1060

⁽⁹⁸⁾ Some programmes are not part of the analysis, as they have been approved too late with respect to the analysis, these include: PRs financed by EMFAF in Luxembourg and Slovakia. Moreover, Denmark opted out of AMIF and ISF PRs, while Ireland opted out of the BMVI.

Annex D2 - Additional information on the analysis of the CPR funds

CPR policy overlap

The figure below illustrates the funds with the highest level of policy overlap, considering the position of each MS in relation to the EU average⁽⁹⁹⁾. A cursory observation of all quadrants in the figure indicates the differences in policy overlap for each fund combination at the EU level. In terms of the EU average, the ERDF-ESF+ overlap presents the lowest value followed by the JTF-EMFAF, ERDF-JTF policy overlap, while the highest value was seen for the ERDF-EMFAF. The combination of ERDF-EMFAF programmes presents, on average, more than double the number of beneficiaries than the ERDF-ESF+ combination. This is consistent with the policy area in which these funds focus their attention. More specifically:

The first quadrant shows the policy overlap between the ERDF and ESF+. It emerged that countries like Slovakia, Denmark, Croatia, and Lithuania have a high level of overlap between policy areas in the ERDF and ESF+ programmes. In particular, for Slovakia and Lithuania the ERDF and ESF+ programmes present the highest overlap in the policy area of education, training, and skills. For Denmark, it is in research and innovation and employment and labour markets, while in Croatia access to social services has the most overlap.

The second quadrant shows policy overlap between the JTF and EMFAF. Among the MSs exceeding the EU average, Sweden has the highest overlap in the policy area of climate change and adaptation; Slovenia in research and innovation, SME competitiveness and local and urban development; Finland in climate change and adaptation and research and innovation; Poland in green transition; and Denmark in the research and innovation area.

The third quadrant shows the policy area overlap between the ERDF and EMFAF. Finland, France, Poland, and Denmark exceed the EU average the most. Finland, in particular, has a high level of overlap in research and innovation, and climate change and adaptation. In the case of France, the policy areas include research and innovation, digital connectivity, SME competitiveness, green transitions and climate change and adaptation. For Poland, the overlap covers the policy areas of research and innovation, green transition, climate change and adaptation, and education, training, and skills. Finally, Denmark has some overlap in research and innovation and digital connectivity. Moreover, the analysis confirmed the broad use of both funds across several policy areas, in contrast with the JTF and ESF+.

The last quadrant shows the policy overlap between the ERDF and JTF. Among the MSs exceeding the EU average, Slovenia has overlaps in research and innovation, Slovakia in green transition and education, training, and skills; Sweden in green transition and research and innovation; Finland in green transition. As for the other funds, Denmark also has policy area overlap in: research and innovation, digital connectivity, SMEs competitiveness, green transitions, climate change and adaptation, and transport networks and urban mobility.

⁽⁹⁹⁾ To assess the policy overlap for each MS, the number of beneficiaries and policy areas that overlap across all programmes supported by both funds in question has been calculated, provided that these programmes operate within the same geographical territory. The EU average is determined as the mean value derived from all MS averages. In all quadrants of the figure, most MSs are either below or very close to the EU average, so there is little variation in the degree of policy overlap between MSs.

Figure 20. Policy overlap for selected funds (ERDF, ESF+, EMFAF, JTF), by Member State

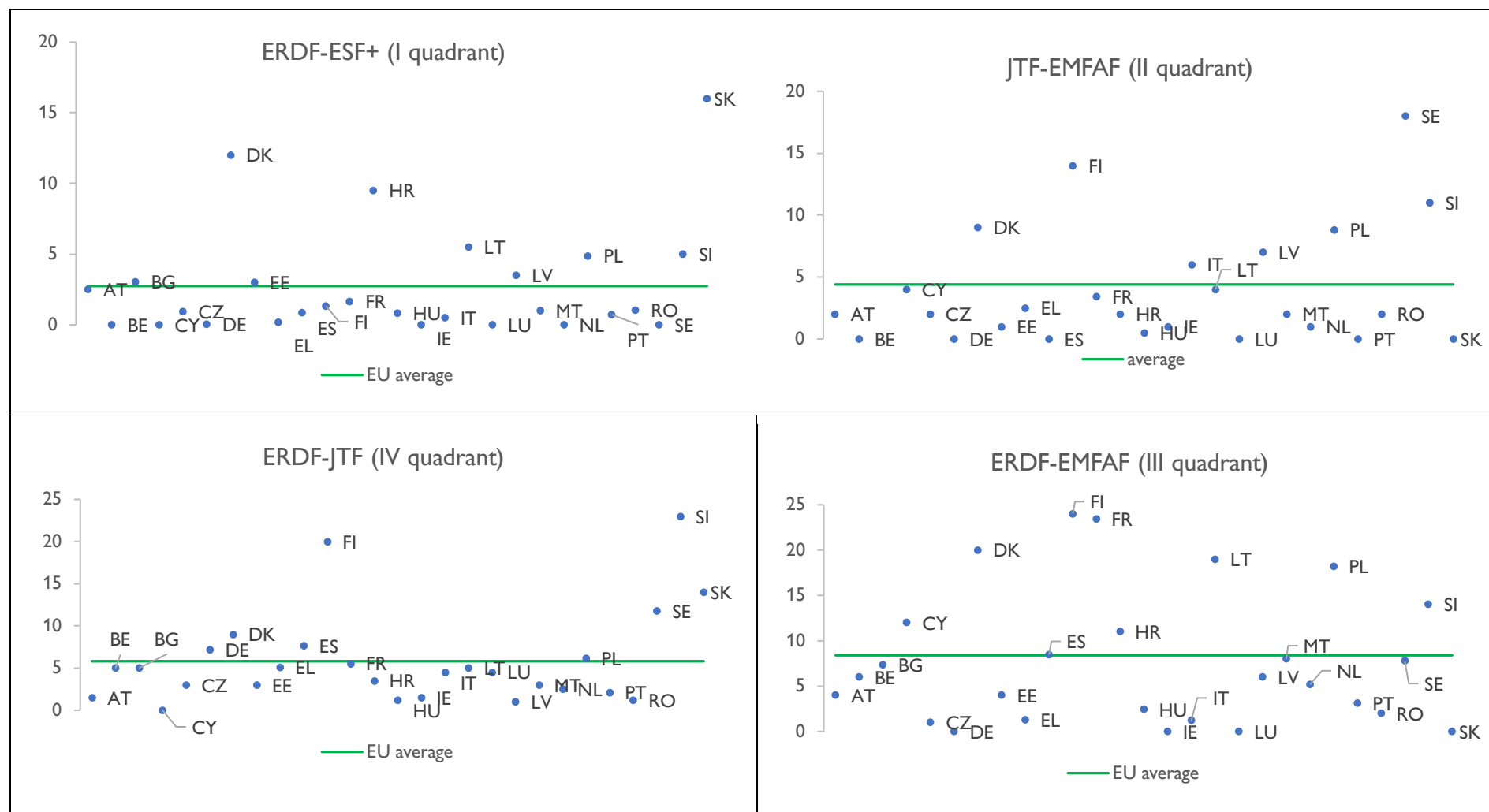
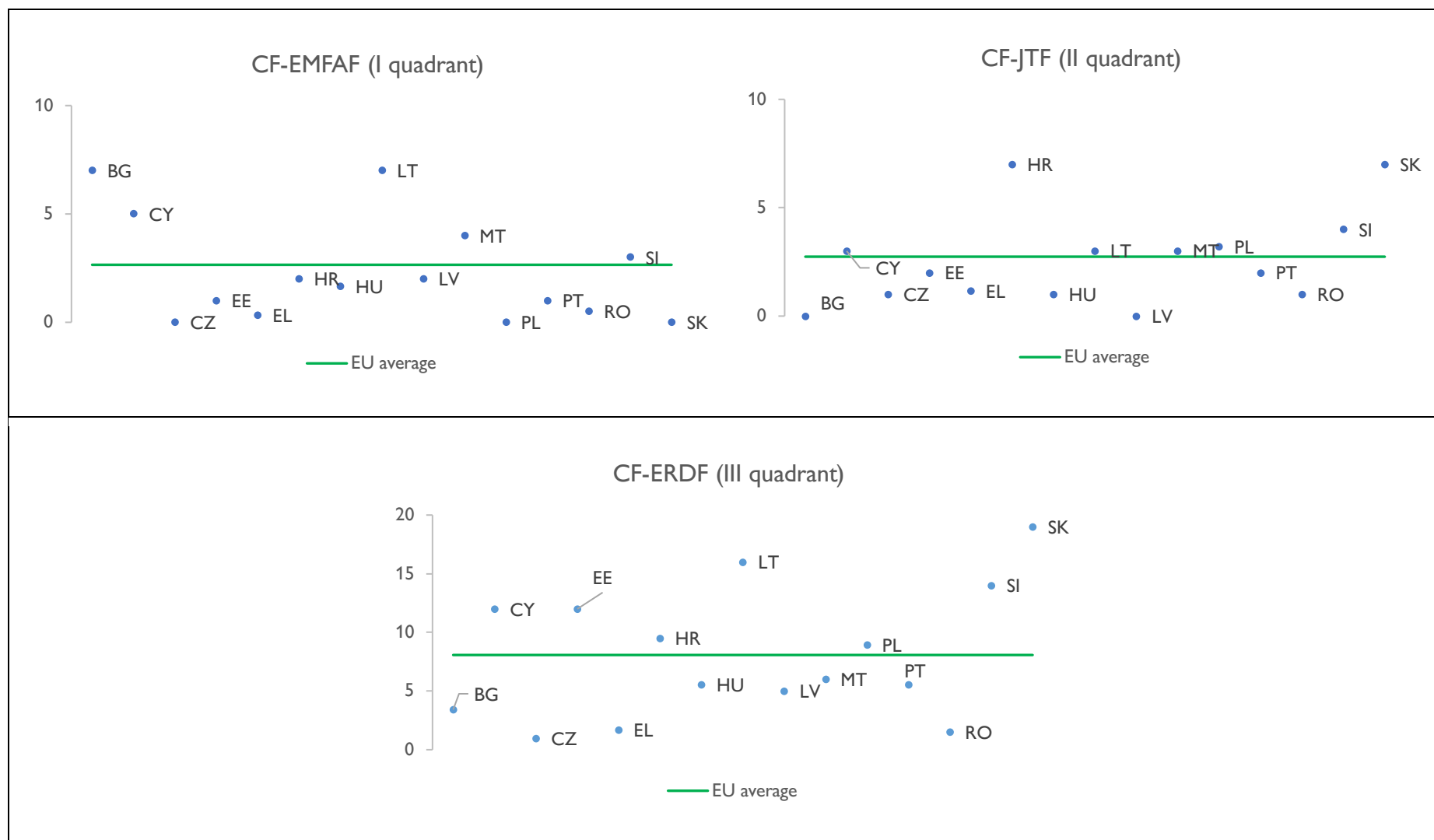


Figure 21. Policy overlap for selected funds (CF, EMFAF, JTF, ERDF) by Member State



The data regarding the CF are more consistent across MSs. Given the reduced number of MSs employing the CF, policy overlap for this fund with the ERDF, JTF and EMFAF is illustrated in the figure above. The first quadrant shows the policy overlap between the CF and EMFAF, specifying the MSs position in comparison to the EU average. It emerged that countries like Bulgaria, Lithuania, Cyprus and Slovenia have a high level of policy area overlap in the CF and EMFAF programmes, in particular, in the policy area of green transition.

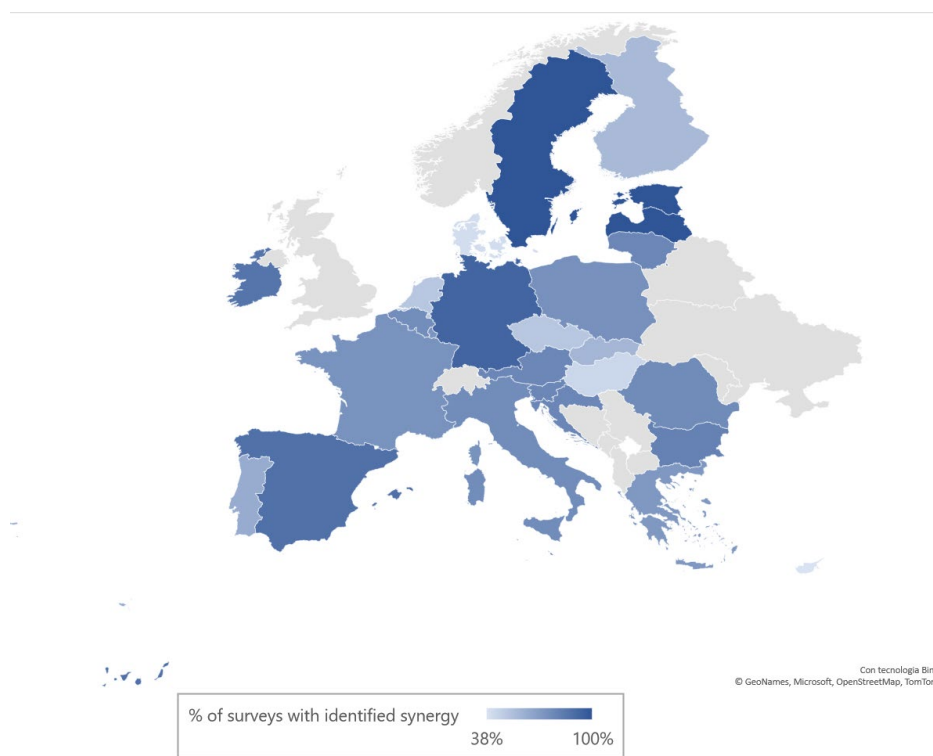
The second quadrant shows the policy overlap between the CF and JTF. The MSs with the highest overlap are Croatia, Slovakia and Slovenia. In this case, green transition is the policy area with the most overlap for Croatia and Slovakia, while for Slovenia it is transport networks and urban mobility.

Lastly, Slovakia, Slovenia and Lithuania have a marked overlap between the CF and ERDF programmes (third quadrant). For Slovakia and Slovenia, the policy areas with the highest overlap are green transition and climate change and adaptation; Slovenia also has transport networks and urban mobility. Lithuania has the largest number of policy areas that overlap, including: research and innovation, digital connectivity and, also in this case, green transition, climate change and adaptation and transport networks and urban mobility.

Synergy among CPR funds and between CPR funds and EU funds and instruments

Differences in the level of synergies by MS are provided in the map below.

Figure 22. Level of synergies, by Member State



Source: Consortium elaboration based on survey data (sample 536)

Table 46. Percentage of the level of synergy by MS of the table above

MS Code	Percentage Synergy
AT	78%
BE	75%
BG	80%
CY	38%
CZ	50%
DE	93%
DK	40%
EE	100%
EL	70%
ES	88%
FI	56%
FR	73%
HR	78%
HU	43%
IE	86%
IT	75%
LT	78%
LU	71%
LV	100%
MT	88%
NL	50%
PL	73%
PT	62%
RO	76%
SE	100%
SI	78%
SK	57%

Annex E - List of programmes identified as practices and good practices for analysis and interviews

The table in the next page presents an overview of the cases proposed for consideration for the interviews and analysis of best practices. The table also presents the geographical coverage of these programmes, the synergies with EU funds and instruments identified in the selected programmes and the transfers approved. When categorisation of the risk scenario is uncertain due to insufficient details on the coordination mechanisms, the cell is left blank.

A section of the interviews will be dedicated to assess the readiness and preparedness of the project pipeline, as well as the potential risks associated with submitting parallel applications under different EU funding programmes. Based on available data from the 2014-2020 period from COHESION DATA, the table below presents a list of programmes analysed in task 6 and 7 that could potentially have projects with a total cost exceeding 50 million euro.

Table 47. List of potential programmes for analysis of project pipeline

Programme Code	Programme name	Geographical coverage	Funds
2021AT16FFPR001	Multi-fund Programme Investments in employment and growth ERDF / JTF Austria 2021-2027	National	ERDF/JTF
2021BG16RFPR001	Programme ERDF Competitiveness and Innovation in Enterprises	National	ERDF
2021CZ05FFPR001	Johannes Amos Comenius, multi-fund CZ	National	ERDF, ESF+
2021EL16FFPR004	Programme Transport 2021-2027 ERDF/CF	National	ERDF, CF
2021ES16RFPR001	National Multi-regional programme ERDF 2021-2027	National	ERDF
2021IT16FFPR005	NP Metro+ and southern medium sized cities 2021- 2027	National	ERDF, ESF+
2021LT16FFPR001	EU Fund Investments LT	National	ERDF, ESF+, CF, JTF
2021SI16FFPR001	Slovenia's EU Cohesion Policy Programme 2021- 2027	National	ERDF, ESF+, CF, JTF
2021SK16FFPR001	Programme EU funds Slovakia - SK	National	ERDF/CF/JTF/ESF+

Table 48. Proposed list of interviews

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
Austria	2021AT16FFPR001	Multi-fund Programme Investments in employment and growth ERDF / JTF Austria 2021-2027	National	ERDF, JTF	High overlap with ESF+, good example of description of coordination mechanism	EAFRD, HE, NRRP	Low-risk scenario	Transfer from ERDF to ESF+ (both transition and more developed regions)
	2021AT05FFPR001	ESF+ Programme Employment Austria & JTF 2021-2027	National	ESF+	Selected to further analyse the possible synergy with EU funds and instruments	EAFRD, Erasmus+, NRRP		
Belgium	2021BE14MFPR001	Belgium EMFAF	National	EMFAF	High overlap with two CPR funds (JTF and ERDF), without any description of coordination mechanisms		High-risk scenario	Transfer from ERDF to ESF+ (more developed region) and ESF+ to ERDF (transition region)
	2021BE05SFPR005	Programme ESF+ Flanders 2021-2027	Regional	ESF+	Selected to assess the approved transfer	Erasmus+	Policy overlap not significant	
Bulgaria	2021BG16RFPR001	Programme ERDF Competitiveness and Innovation in Enterprises	National	ERDF	High risk scenario because policy overlap with EMFAF is high but the coordination is not described. Furthermore, the programme presents several	HE, DEP, NRRP	High-risk scenario	Transfer from ERDF and CF to InvestEU

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					instances of synergy with EU funds and instruments.			
	2021BG05SFPR003	Programme ESF+ Food and Basic Material Support Programme	National	ESF+	The only programme in Bulgaria that describes a coordination mechanism (with other ESF+ funded PRs)		Low-risk scenario	
Cyprus	2021CY16FFPR001	Cohesion Policy Programme "THALIA 2021-2027"	National	CF, ERDF, ESF+, JTF	The most significant programme in Cyprus, no coordination mechanism described either with EU funds and instrument or with other CPR programmes	HE, LIFE	High-risk scenario	
Czechia	2021CZ05FFPR001	Johannes Amos Comenius, multi-fund CZ	National	ERDF, ESF+	Selected to evaluate the decision on transfer and synergies with EU funds and instruments	HE, Erasmus+, NRRP		Contribution from ERDF to InvestEU. Transfer from ESF+ to CF
Germany	2021DE16FFPR002	Multi-fund Programme ERDF/JTF North	Regional	ERDF, JTF	Among the regional ERDF programmes,	HE	Low-risk scenario	Transfer from ESF+ to Erasmus+,

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
		Rhine-Westphalia 2021-2027			these are the ones that better describe coordination with other funds (ESF+, ERDF and EAFRD)			from ERDF to ESF+ (more developed region) and ESF+ to ERDF (transition region)
	2021DE05SFPR009	Programme ESF+ 2021 - 2027 Mecklenburg-Vorpommern	Regional	ESF+			Policy overlap not significant	
	2021DE65AMPR001	Programme Germany - AMIF	National	AMIF	Overlap and synergy with ESF+ but no coordination mechanism described		High-risk scenario	
Denmark	2021DK16JTFR001	Green Technologies and Skills for a Just Transition	National	JTF	High overlap with ERDF, the programme cites coordination mechanisms with other CPR funds but does not provide details		Low-risk scenario	
	2021DK16RFPR001	National programme for the ERDF in Denmark: Strong enterprises through innovation, digitalization and green transition	National	ERDF	Interesting case of collaboration with HE through the Danish Agency for Education Research	HE	Low-risk scenario	Contribution to InvestEU
Estonia	2021EE16FFPR001	Programme for Cohesion Policy for the period 2021-2027	National	ERDF, ESF+, JTF, CF	High coordination with NRRP	EAFRD, CEF, DEP, Erasmus +, NRRP	Low-risk scenario	Transfer from CF to ERDF and ESF+

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
Greece	2021EL16FFPR004	Programme Transport 2021-2027 ERDF/CF	National	ERDF, CF	The programme describes coordination in the digital area	CEF, DEP	Low-risk scenario	Transfer from Cohesion Policy funds (ERDF, ESF+, CF) and EMFAF to BMVI
	2021EL16FFPR013	Instrument for Financial Support for Border Management and Visa Policy (BMVI) of the Integrated Border Management Fund	National	BMVI	Transfer from Cohesion Policy funds (ERDF, ESF+, CF) and EMFAF to BMVI		Policy overlap for digital with ERDF, for further analysis	
Spain	2021ES16RFPR001	National multi-regional programme ERDF 2021-2027	National	ERDF	The programme describes a Fund Coordination Committee that should ensure adequate coordination at regional and national level among CPR programmes. This Committee will also seek synergy with the NRRP	EAFRD, CEF, DEP, Erasmus+, NRRP	Low-risk scenario	Transfer from ERDF to ESF+ (more developed and transition regions)
	2021ES16RFPR020	Programme Basque Country ERDF	Regional	ERDF	All regional programmes in Spain have little description of coordination as the MA is national. This is the programme that	EAFRD, HE, LIFE, NRRP		

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					envisions more synergies with EU funds and instruments			
	2021ES14MFPR001	Spain EMFAF	National	EMFAF	Significant overlap with ERDF, the programme cites the necessity for collaboration mechanisms with ERDF and EAFRD but does not provide details on their implementation	NRRP		
Finland	2021FI16FFPR001	Innovation and skills in Finland 2021 – 2027 ERDF, ESF+, JTF	National	ERDF, ESF+, JTF	While not described in detail, a cooperation group should coordinate funds from ERDF, ESF+, JTF and EAFRD to exploit synergies among them	EAFRD, NRRP		Contribution from ERDF to InvestEU
	2021FI65ISPR001	Programme ISF - Finland	National	ISF	The home fund programmes all describe coordination among them, including a joint electronic information system. The ISF programme also cites a		Low-risk scenario	

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					collaboration mechanism with HE			
France	2021FR14MFPR001	European Maritime, Fisheries and Aquaculture Fund - Programme for France	National	EMFAF	The programme does not describe any coordination mechanisms despite a high level of overlap with ERDF and JTF	EAFRD	High-risk scenario	
	2021FR05FFPR001	Regional programme for Île-de-France and the Seine basin ERDF-ESF+ 2021-2027	Regional	ERDF, ESF+	The PRs ensure coordination with national ERDF and ESF+ programmes through the MC	EAFRD	Low-risk scenario	
	2021FR16FFPR001	Programme Provence-Alpes-Côte d'Azur and Massif des Alpes ERDF-ESF+-JTF 2021-2027	Regional	ERDF, ESF+, JTF		HE	Low-risk scenario	
Croatia	2021HR16FFPR001	Programme Competitiveness and Cohesion 2021 – 2027 ERDF	National	ERDF, CF	National coordination committee for ESIF funds	Erasmus+, NRRP	Low-risk scenario	Transfer from ESF+ to ERDF
	2021HR16FFPR002	Integrated Territorial Programme 2021 - 2027	National	ERDF, JTF		NRRP	Low-risk scenario	

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
Hungary	2021HU16FFTA001	Implementation Operational Programme Plus	National	ERDF, ESF+, CF, JTF	The programme describes a new information system to be implemented to foster collaboration among CPR funds	TSI		Transfer from ESF+ to ERDF
	2021HU14MFPR001	Hungarian Fisheries Programme Plus	National	EMFAF	No description of coordination mechanisms with other CPR funds despite significant policy overlap		High-risk scenario	
Ireland	2021IE14MFPR001	Ireland EMFAF	National	EMFAF	Policy overlaps among funds are low but the PA describes mechanisms to ensure coordination and synergy that should be set up during the implementation phase of the programmes	HE, CEF	Low-risk scenario	
	2021IE16RFPR002	Southern, Eastern and Midland Regional Programme 2021–2027	Regional	ERDF		LIFE, NRRP		
Italy	2021IT16FFPR005	NP Metro+ and southern medium cities 2021- 2027	National	ERDF, ESF+	The programme presents significant policy overlap with the NRRP and regional CPR programmes but does not describe		High-risk scenario	Transfer from ERDF to ESF+ (all categories of regions)

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					any form of coordination			
	2021IT16RFPR017	PR ERDF Toscana region	Regional	ERDF	As in other regional programmes in Italy, no form of coordination with other CPR funds is outlined	NRRP	High-risk scenario	
	2021IT14MFPR001	Italy EMFAF	National	EMFAF	Significant policy overlap with other CPR funds (especially ERDF), with no description of coordination		High-risk scenario	
	2021IT05SFPR013	Sardegna ESF+	Regional	ESF+	Assess transfer to ESF+. The programme does not detail any coordination mechanisms with either other regional or national programmes.			
Lithuania	2021LT65BVPR001	Programme Lithuania - BMVI	National	BMVI	The PR describes a system of coordination with all CPR funds through the MC that will also recommend combining funding		Low-risk scenario	Transfer from CF to ERDF

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					from different EU funds and instruments when appropriate			
Luxembourg	2021LU05FFPR001	ESF+ Programme 2021-2027: Investing in the future	National	ESF+	According to the programme, a consultation committee will ensure coordination among the CPR funds		Low-risk scenario	Transfer from ERDF to ESF+
Latvia	2021LV16FFPR001	Cohesion Policy funding - LV – ERDF/CF/ESF+	National	ERDF/CF/ESF+	The programme describes a 'double financing Risk Control Matrix' developed by the Ministry of Finance to coordinate complementary investments	HE, DEP, LIFE, Erasmus+, NRRP	Low-risk scenario	Transfer from ERDF to ESF+ and from CF to ERDF
Malta	2021MT16FFPR001	Towards a smarter, well connected and resilient economy, a greener environment and an integrated society ERDF/CF	National	ERDF/CF/JTF	Assess transfer to HE and contribution to InvestEU	TSI, EAFRD, HE, NRRP	Low-risk scenario	Transfer from ERDF to HE and contribution to InvestEU
Netherlands	2021NL16JTTPR001	Programme JTF 2021 – 2027 Netherlands	National	JTF	The ESF+ and the JTF closely collaborate to implement the	NRRP	Low-risk scenario	

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					employment strategy			
	2021NL16RFPR002	Programme ERDF 2021-2027 West Netherlands	Regional	ERDF	The PR has significant policy overlap with other funds (EMFAF, JTF; ESF+) but does not describe coordination mechanisms	EAFRD, HE	High-risk scenario	
Poland	2021PL65AMPR001 2021PL65BVPR001 2021PL65ISPR001	Home funds (PR AMIF, PR ISF, PR BMVI)	National	AMIF, ISF, BMVI	The three HOME fund programmes have a common MA that should ensure collaboration in the implementation of these programmes		Low-risk scenario	Transfer from ESF+ to CF
	2021PL16FFPR001	Dolny Śląsk - PL	Regional	ERDF, ESF+, JTF	Both regional programmes collaborate on the implementation of the JTF.	NRRP	High-risk scenario	
	2021PL16FFPR012	European Funds for Lower Silesia 2021-2027	Regional	ERDF, ESF+, JTF	Nonetheless, both programmes lack information of possible cooperation mechanisms with other CPR funds and EU funds and instruments	LIFE, NRRP	High-risk scenario	

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
	2021PL16FFPR017	European Funds for Infrastructure, Climate Environment 2021-2027 CF	National	ERDF, CF	Assess transfer from ESF+ to CF	LIFE, EU4Health	High-risk scenario	
Portugal	2021PT16CFPR001	Thematic Programme for Climate Action and Sustainability PT - Thematic Programme for Climate CF	National	CF	No coordination mechanisms are described despite significant policy overlap with ERDF and JTF	CEF, NRRP	High-risk scenario	Transfer from CF to ESF+ and EMFAF
	2021PT16FFPR003	Norte Regional Programme 2021-2027	Regional	ERDF, ESF+, JTF	Assess possible transfer as well as how synergy with EU funds and instruments could be implemented as the programme does not elaborate on it	EAFRD; CEF, NRRP	High-risk scenario	
Romania	2021RO16RFPR004	South Muntenia ERDF regional programme	Regional	ERDF	Assessment of transfer from ESF+ to ERDF. Furthermore, the programme lacks information on coordination both with other CPR funds and EU funds and instruments		High-risk scenario	Transfer from ESF+ to ERDF
	2021RO16FFPR003	PR Health ERDF/ESF+	National	ERDF, ESF+	Interesting case of synergy between	NRRP	For further analysis	

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					ERDF and EU4Health			
	2021RO05FFPR001	PR Social Inclusion and Dignity	National	ERDF, ESF+	The programme lacks a description of how it coordinates with other CPR regional programmes, and it provides few details on the implementation of synergy with EU funds and instruments	EAFRD, NRRP	High-risk scenario	
	2021RO65AMPR001 2021RO65BVPR001 2021RO65ISPR001	Home funds (AMIF PR, BMVI PR and ISF PR) – one MA	National	HOME funds	The three programmes employ a common MA to foster collaboration and synergy		Low-risk scenario	
Sweden	2021SE16RFPR007	European Regional Development Fund programme for Central Norrland 2021-2027	Regional	ERDF	The PR presents the most detailed coordination mechanism among the regional programmes (involving ESF+ and ERDF)	EAFRD, HE	Low-risk scenario	
	2021SE16JTTPR001	Just Transition Fund National programme 2021-2027	National	JTF	High overlap with ERDF without any description of the	LIFE, NRRP	High-risk scenario	

Strategic coordination and financial complementarity of CPR Funds with other EU Instruments

Member State	PR CODE	PR name	Geographical level	Funds	Justification	Synergy with EU funds and instruments	Categorisation of potential risk	Transfer at MS level
					coordination mechanism			
Slovenia	2021SI65AMPR001 2021SI65BVPR001 2021SI65ISPR001	Home funds (PR AMIF, PR ISF, PR BMVI)	National	HOME funds	In all three OPs – BMVI, AMIF and ISF – the importance of coordination guided by the Ministry of Interior was highlighted.		Low-risk scenario	Transfer from ESF+ to ERDF
Slovakia	2021SK16FFPR001	Programme EU funds Slovakia - SK	National	ERDF/CF/JTF/ESF+	Assessment of transfer to CF		Low-risk scenario	Transfer from ERDF and ESF+ to CF

Annex F - Template of semi-structured interviews

The following boxes present the draft questions for use during the interviews with MAs of Programmes, as illustrated in the guidance presented to the NEs.

The NE should start the interview with an introduction regarding the study and the analysis conducted so far. The following points should guide this introduction:

Very brief overview of the objectives of the study and what the study team intends to achieve with the interview,

Structure of the interview, illustrating the two main themes to be investigated:

- coordination mechanisms at programme level
- synergies at project and programme level

Relevance of the information that we are trying to assess from the MA: the interview should complete and provide a wider and more comprehensive picture of the findings that have emerged so far. The NEs should briefly illustrate the major findings of the analysis so far (level of policy overlap, coordination and synergy) for the programme interviewed. Also, the NEs should indicate what other documents (related to MC and selection criteria) have been analysed.

MAIN QUESTIONS	POINTS TO HELP GUIDE THE ANSWERS
Ice Breaking question	
1. In your opinion, what are the advantages of complementarities and what are the costs/possible obstacles?	Relate what has emerged from the survey in the policy area mapping (beneficiaries, policy areas, form of support)
Coordination	
The questions should be guided and adapted according to the findings from:	
<ul style="list-style-type: none"> - the analysis of the programme in the coordination section - the analysis of Monitoring Committee composition 	
2. For your programme, how does coordination with <ul style="list-style-type: none"> a. other CPR programmes happen? b. the NRRP happen? 	The question 'how does the programme coordinate with' intends to assess whether there are structured mechanisms for coordination at the programme level, or whether the MA has a more discontinuous/informal approach to

<p>c. other EU funds and instruments happen?</p> <p>Could you please provide further details and elaborate on this?</p> <p>3. What are the costs/difficulties of implementing these coordination mechanisms?</p>	<p>coordination. Furthermore, at what level (national, regional) do these mechanisms work?</p> <p>The coordination mechanism can also refer to modalities of <i>exchange of information</i>.</p> <p><u>Other questions to stimulate the dialogue:</u></p> <p>What type of checks were done during the preparation of programmes to minimise the risks of overlaps?</p> <p>Reflect on the coordination mechanism differences:</p> <ul style="list-style-type: none"> - from past programming periods. Maybe current routines and mechanisms are a continuation of past experiences or have been implemented to overcome past difficulties. - between CPR funds and other EU funds and instruments, and within the CPR funds.
<p>MONITORING COMMITTEE</p> <p>4. For your programme, does the Monitoring Committee have a role in the coordination described above? In general, is the MC a relevant and useful policy tool to ensure coordination among CPR funds and between CPR funds and other EU funds/instruments?</p>	<p>If relevant, relate what has emerged from the analysis of the MC documents. Are authorities managing other EU funds and instruments represented in the PR Monitoring Committee?</p> <p>If yes, reflect on their role and contribution.</p> <p>Assess whether and to what degree Managing Authorities participate in the relevant meetings and exchange moments with authorities in charge of relevant EU funds and instruments, and the NRRP.</p>
<p>Synergy and selection criteria</p>	
<p>The questions should be guided and adapted according to what has emerged from:</p>	

- the analysis of the programme in the synergies section (which EU funds and instruments or CPR funds?)
- the analysis of selection criteria (which EU funds and instruments or CPR funds?)

5. From our documental analysis, it has emerged that you intend to implement synergies with the EU fund/instrument [...]

[For NEs: here refer to both surveys, citing the EU funds and instruments that are written in the programmes or referred to in the selection criteria].

Can you please elaborate on it?

6. From our documental analysis, it has emerged that you intend to implement synergies with the CPR funds [...]

[For NEs: this question should repeat the previous one but cite CPR funds instead of EU funds and instruments]

In case there is NO synergies detected in the documental analysis:

5. In your opinion, what are the advantages of synergy with CPR funds and other EU funds and instruments, and what are the costs/possible obstacles to implementing them? Please elaborate *[guide again the discussion based on the additional points provided in question 5].*

6. If no synergy is contemplated, can you please elaborate your strategic and operational decision not to opt for synergy with other EU funds and instruments? How does the programme avoid double funding and the risk of overlapping?

7. Are you aware that the EC has elaborated a *guidance on synergy* with HE? Has it helped your planning of the programme? Is there, or should there be, support from the EC?

QUESTION 5 and 6:

Guide the response with the following additional questions:

- how are these synergies implemented?
- what advantages do they provide?
- what obstacles/drawbacks or costs do they present?
- have they been implemented in past programming periods?
- do they specifically focus on alternative or cumulative funding?

If you have identified any **selection criteria** that are relevant to the study (Task 5), ask how said criteria should favour and contribute to ensuring synergies with other EU funds/instruments.

Follow up to questions 5 and 6: Did we overlook anything in our documental analysis (analysis of the PR and selection criteria) that you would like to add?

Info to help guide the answer on how the synergies are implemented:

- influenced by National routines
- elaborated thanks to the interaction with other actors from other funds

Obstacles and costs could be related to:

- national/ EU legal/ administrative obstacle to using this policy tool to ensure synergy. How are you planning to address it/them?
- Insufficient administrative capacity of the programme Authorities or beneficiaries.

Typologies of selection criteria: eligibility criteria, quality criteria, priority criteria.

8. In your opinion, are there any other mechanisms, policy tools or strategies to encourage synergies with other CRP funds / EU funds and instruments?	
Financial Transfer	
<p>9. Do you plan to implement financial transfers pursuant to Article 26? If so, why? (Why not? What are the disadvantages?)</p> <p>10. What are the possible benefits of these transfers?</p>	Refer back to the transfer tables at the PA level made available by the Core Team.
Project Pipeline	
<p>11. In your project pipeline, how do you ensure demarcation mechanism with other funds including EU funds and instruments (also, NRRP)?</p> <p>12. In relation to your projects of strategic relevance, do you have mechanisms in place to ensure demarcation of the funds?</p> <p>13. What are the advantages of these demarcation mechanisms?</p> <p>14. How are the potential beneficiaries informed about the different sources of EU funding and how are they oriented towards one or the other?</p> <p>15. Have you planned a project with total costs exceeding EUR 50 million?</p>	Ask in particular the mechanisms in place to avoid double funding with RRF.

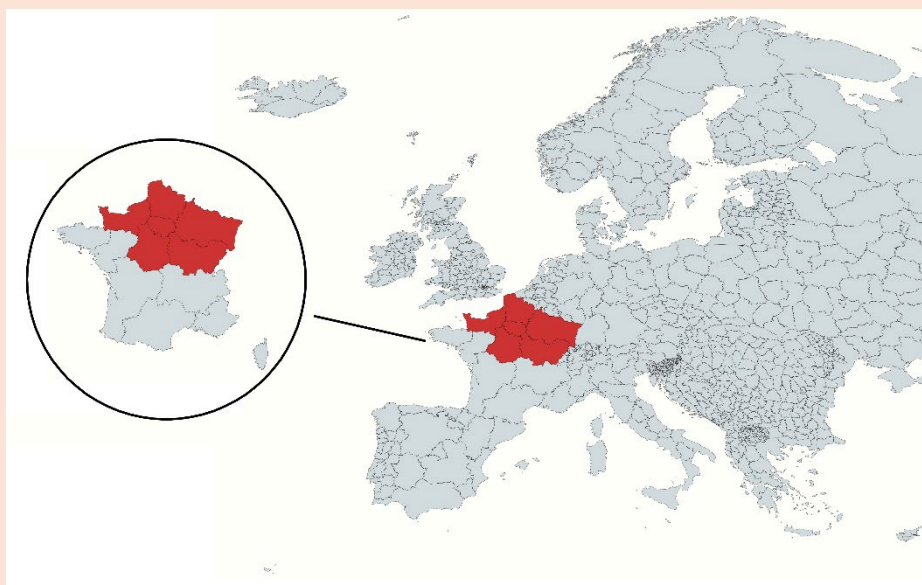
Annex G – Best practices

Annex G1 – Coordination mechanisms



France

Programme name	Regional programme Île-de-France et bassin de la Seine ERDF-ESF+ 2021-2027
Programme IC	2021FR05FFPR001
Fund	ERDF/ESF+
Programme budget	EUR 1.07 billion
Managing Authority	Île-de-France Region



KEY ELEMENTS

The regional ERDF-ESF+ Île-de-France et bassin de la Seine programme is an excellent example of coordination between regional and national levels. Moreover, this case also highlights the need to ensure continuity between programming periods, provide a stable policy framework facilitating the work of programme authorities, stakeholders and beneficiaries, and safeguard the possibility of continuing incomplete projects or up-scaling existing investments.

The main takeaways from this practice are the following:

- An ex-ante analysis carried out at the national level, with the involvement of regions and relevant stakeholders, allowed for the elaboration of demarcation lines and potential synergies among the CPR funds and other EU funds and instruments under direct and indirect management. This was reflected in the Partnership Agreement (PA). Moreover, managers of programmes supported by EU funds and programmes involved in this ex-ante demarcation exercise meet once a year in the State-Regions Interfund Committee to discuss the management of EU funds.
- At the national level, regions and the central government jointly elaborate planning contracts to facilitate the convergence of funding in favour of structural projects for regional development and the coherence of public policies, enabling a shared strategic vision at the regional level.
- These elements result in the regional establishment of formal and structured mechanisms to ensure coordination between the national and regional levels. The Regional Monitoring-Interfund Committee provides an example of this structured coordination.

PROGRAMMING CONTEXT



The Île-de-France et bassin de la Seine region is one of the most developed regions in the European Union; therefore, the financial resources allocated to the programme are limited. Consequently, the programme authorities decided to concentrate:

- the ERDF budget on PO1 - A smarter Europe, PO2 - Greener Europe, and to the Seine Basin inter-regional axis.
- The ESF+ budget is concentrated with PO4 - A more social Europe.

The critical strategic vision for regional development relies on smart, green and inclusive development. For this reason, Integrated Territorial Investments (ITIs) are mobilised within PO1 and PO2 to support innovation for a sustainable city, in line with the S3 strategy, the reduction of greenhouse gas emissions and the creation of multifunctional green spaces to preserve biodiversity.

These goals are paired with interventions for the digitisation of territories, thermal building renovation, the circular economy, and biodiversity.

As for the National Recovery and Resilience Plan (NRRP), the French National Agency for the Cohesion of Territories (ANCT) elaborated a guide on articulating funds between Cohesion Policy funds and the NRRP.

In line with the S3 strategy, the programme also has synergies with the EAFRD to support R&I in the agricultural sector.

To foster an integrated development vision encompassing multisectoral and multidisciplinary approaches, the regions have established a dual-level coordination mechanism primarily at the national level, involving two key entities: the ANCT and the General Delegation for Employment and Vocational Training of the Ministry of Labour, Employment and Integration. This framework ensures synergies between programme-supported interventions and those funded by other EU programmes and instruments through information sharing and active collaboration, achieving robust complementarity at strategic and operational levels.

COORDINATION MECHANISM



Given the specific multilevel governance structure in France, the Île-de-France et bassin de la Seine ERDF-ESF+ 2021-2027 programme has developed an ongoing structured model of coordination between the regional MA and national agencies. This model is distinguished by its dual approach to coordination. Firstly, at the regional and national levels, the Regional Monitoring-Interfund Committee plays a crucial role in facilitating horizontal coordination among funds. Secondly, the national coordination, driven by funds, adopts a more vertical approach.

ERDF-ESF+ / Interreg Coordination at the regional level

The Île-de-France Region cooperates very closely with the general and inter-department general delegation to employment and vocational training (DGEFP), which is responsible for implementing the national ESF+ programme led by the Ministry of Labour, Employment and Integration.

A joint committee (Regional Monitoring-Interfund Committee) has been set up at the regional level: it includes the PR programme authorities and a representative of the DGEFP. During the programme preparation period, the two entities also defined demarcation lines between the state and the region to delineate the responsibilities and roles in implementing interventions; the agreement was signed at the end of 2022.

Regarding the European territorial cooperation programmes, the region has a regional contact figure within its departments for the Interreg North-West Europe Programme, which is also on the national monitoring committee for this programme.

The Monitoring Committee and the joint monitoring committee ensure coordination between CPR funds that are managed at regional and national levels. Indeed, these committees bring together representatives of the state's decentralised services and representatives of the region, thereby increasing the visibility of coordination among the actors.

Cohesion Policy Fund cooperation at the national level

Cooperation at the national level is facilitated through continuous communication and operational collaboration.

In terms of communication, the regional MA participates in the work carried out by the ERDF coordinating authority (ANCT) and regularly exchanges information with the other French regions also carrying out Cohesion Policy programmes (ERDF, ESF+ and JTF). These working groups and thematic networks allow for the exchange of good practices and highlight the difficulties encountered in management.

Concerning ESF+ interventions, it is pivotal to ensure that the regional and national programmes supported by this fund complement each other. Therefore, the Ministry, the relevant national agencies and departments and the region and its intermediary bodies publish their calls for projects on their joint website: www.europeidf.fr

The calendar for calls for projects is updated at least three times per year by the MA.

Regarding collaboration between the state and the region, technical coordination meetings between the Île-de-France Region's departments and the state's decentralised departments are organised on a regular basis to ensure the consistent operational implementation of European funds throughout the region.

Additional mechanisms in place to prevent double funding include:

- An IT system to verify the applicant's eligibility and request documentary evidence (e.g. ID, certificates from the unemployment agency...etc.).
- Limited geographical scope: the project must be implemented and benefit the Île-de-France territory only. Calls for projects may further reduce this scope.

Coordination with other EU and national funds

In the PA, demarcation lines are established to define which interventions can be funded by the ERDF, ESF+, and EAFRD. This document serves as the cornerstone for coordinating the utilisation of these funds, ensuring strategic alignment and preventing overlap in funding areas, thus optimising resource used across the different initiatives.

The regional programme MA is also the MA for part of the CAP National Strategic Plan (NSP), developed at the national level. The region facilitates exchanges between the directorates responsible for both the Cohesion Policy Programmes 21-27 and the NSP. This includes mutual participation in each programme's governance body, ensuring cohesive management and implementation strategies across different levels of governance.

Regarding the NRRP, during the design phase of both the regional programme and the NRRP, the State, through the ANCT (acting as the ERDF coordinating authority), facilitated working groups to identify complementarities and the risks of overlap between the different funding. These meetings gathered regional representatives and ministry officers in charge of managing and implementing investments and reforms under the NRRP. In line with the decision taken at the national level involving all the French regions, the region decided to include the following statement in all calls for projects: 'Due to the principle of banning dual European funding, projects funded by the Recovery and Resilience Facility (RRF) will not be eligible under this call for projects.' Exchanges with the ANCT may have taken place on a case-by-case basis for certain projects in order to avoid any risk of double financing.

Moreover, as for other EU funds and instruments under direct management, the region has established a service to guide project holders towards suitable EU funds and instruments for financing their projects. This service assists during the application process, overseeing all European programs and liaising with national contact points for EU instruments. Notably, it facilitates support for Horizon Europe (HE) projects awarded

the Seal of Excellence and explores synergies with the Digital Europe Programme (DEP) via the European Digital Innovation Hubs (EDIH).



Germany

Programme name ESF+ Programme 2021 - 2027 Mecklenburg-Vorpommern

Programme IC 2021DE05SFPR009

Fund ESF+

Programme budget EUR 333.80 million

Managing Authority

Joint Managing Authority for ERDF and ESF+: State Chancellery of Mecklenburg-Western Pomerania, Joint Administrative Authority for ERDF and ESF+.

ESF+ PR Managing Authority: Ministry of Economic Affairs, Infrastructure, Tourism and Labor of Mecklenburg-Western Pomerania.



KEY ELEMENTS

The ESF+ regional programme 2021-2027 Mecklenburg-Vorpommern has elaborated several instruments to enhance coordination with other funds, particularly with the ERDF and EAFRD. This was particularly relevant in the design phase of the programme. In the implementation phase, coordination occurs between the responsible line departments and the other fund managers, mainly at the operational level.

The main takeaways from this practice are the following:

- The Joint Managing Authority (JMA) for the ERDF regional programme and the ESF+ regional programme: this structure allows for structured coordination at the regional level and ensures cooperation and information exchange between the regional ERDF and ESF+ programmes.
- Coordination between the ERDF, ESF+ and EAFRD-supported interventions works well because it occurs mainly at the operational level (line departments), involving personnel working on the programme implementation daily. Therefore, the exchange is operative and continuous. Exchanges also involve national agencies managing ESF+ interventions and AMIF activities.

PROGRAMMING CONTEXT



The ESF+ programme 2021 - 2027 Mecklenburg-Vorpommern aims to contribute to achieving the goals envisaged in Policy Objective 4 – a more social Europe. The PR will also support investments in PO1 – A Smarter Europe, and PO2 – A Greener Europe, although to a lesser extent. The programme will concentrate resources to support inclusive and qualitative growth, acting in synergy with ERDF-funded interventions. While the ERDF will support measures boosting the development of companies with high added value and a high degree of innovation, the ESF+ PR will fund actions designed to create attractive jobs and promote equal working opportunities. Attractive jobs include fair working conditions for both genders, employment with appropriate qualifications and compatibility of working and private life. The ESF+ PR will fund initiatives designed to create appealing jobs and promote equal working opportunities."

Moreover, the PR allocates financial resources to increase investments in education and human resources, including school education, vocational training and lifelong learning opportunities.

Particular importance is attached to promoting the well-being and inclusiveness of children by reducing educational disadvantages and fostering social inclusion.

Cross-sectorial goals relate to investments towards PO1 and PO2. For PO1, the PR supports the development of digital competences and skills in youth and adulthood. In this context, the PR envisages synergies with the Digital Europe Programme (DEP) and the Connecting European Facility (CEF) to support digital development.

The PR also envisages synergies with the AMIF: the ESF+ will support investments to promote third-country nationals and asylum seekers in the labour market, while the AMIF focuses on socio-economic aspects for asylum seekers and third-country nationals.

COORDINATION MECHANISM

In the 2014-2020 programming period, a joint managing authority (JMA) oversaw all three programmes: the ERDF, ESF and EAFRD¹⁰⁰. However, due to the new structure of the EAFRD under the CAP Strategic Plan, the JMA for the 2021-2027 period has been set up solely for the ESF+ & ERDF PR. The current EAFRD fund management will only serve as a subordinate authority for the federal programme following an extension of the previous programming period.

The decision to set up the JMA for the ERDF and ESF+ reflects the positive experiences in 2007-2013 and 2014-2020, as well as the interest and positive feedback expressed by the relevant stakeholders in the programmes.

The JMA ensures structured and continuous coordination between the ERDF and ESF+ programmes, which can be echoed in the different phases of the programme lifecycle:

- **Programme design:** this represents the most relevant and intensive phase of coordination. It includes both multilateral and bilateral contact between the JMA and the fund administrations.
- **Programme implementation:** there are regular JMA meetings between the JMA and the three fund administrations. The EAFRD fund management will remain in this coordination in the future to ensure complementarity between the three funds. These JMA meetings take place about six times a year (according to planning) and are supplemented by further meetings if there is a corresponding need. This need can be formulated by each of the participants.

The coordination process and exchange are most intensive with the ERDF as it represents the main fund with which the PR coordinates. In addition, coordination also occurs with the EAFRD. The ESF+ and ERDF hold separate meetings between the fund managers on average twice a month. These meetings play a pivotal role during the implementation phase, as they are occasions where both operational and strategic aspects of the programme implementation are discussed.

One of the challenges during the PR design phase related to defining the demarcation criteria for ESF+ and AMIF interventions. Regional coordination with the AMIF took place through the contact point in Hamburg, with the involvement of ESF+ departments. During the implementation, the responsible department also maintained contact with the AMIF contact point in Hamburg. The ESF+ fund manager played a significant role in coordinating the demarcation with the federal programme.

The coordination with the other programmes (CEF, DEP, NRRP) was mainly done by involving the respective technical units during the programme preparation phase to coordinate and delimit the different programmes. The fund management was less involved.

Overall, coordination is well structured and takes place at the line department level. The fund manager, who has taken over many operational tasks from the JMA, is the coordination link between the JMA and the specialist units. These technical units have better insight into the ongoing developments than either the fund management or the JMA. Another advantage of the ongoing coordination at the operational level is that these units are much better able to identify and assess concrete synergies and ensure fine-

¹⁰⁰ The EAFRD was extended for another two years, which is why the programme period is still ongoing for the JMA. The old JMA name (incl. EAFRD) will be kept until the 2014-2020 is closed (incl. EAFRD).

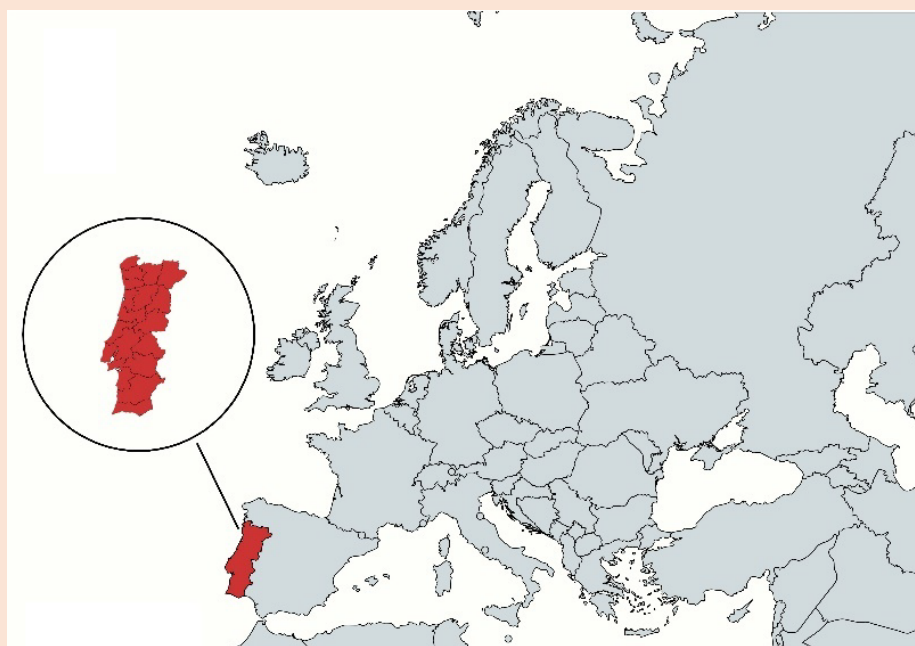
tuning of the programme implementation since they can take into account current developments, which they have a better view of than other units.

There is usually no coordination for demarcation at the level of individual projects since this is already done beforehand when the project guidelines are developed. These guidelines define the rules according to which the projects are approved. Additional delineation is only necessary for a few individual projects not covered by the guidelines. There is a special demarcation for these projects (of which there are very few in any funding period) jointly carried out by the fund manager and the specialist department.



Portugal

Programme name	Thematic Programme for Climate Action and Sustainability
Programme IC	2021PT16CFPR001
Fund	Cohesion Fund (CF)
Programme budget	EUR 3.10 billion
Managing Authority	Management Authority of the Programme for Climate Action Programme



KEY ELEMENTS

The Thematic Programme for Climate Action and Sustainability (Sustainability 2030) is a national programme entirely supported by the CF dedicated to climate action and sustainability and managed at the national level by the Ministry of the Environment and Climate Action.

The main takeaways from this practice are the following:

- National coordination mechanisms are established to implement interventions supported by the national programme and to delineate them from regional programmes.
- Through this coordination, the risk of double funding is limited.
- The Agency for Cohesion and Development (AD&C) plays a coordinating role in the programme implementation.
- The articulation networks play a pivotal role in supporting the management and implementation of the programme.

PROGRAMMING CONTEXT



The Thematic Programme for Climate Action and Sustainability is a national programme financed by the CF. Its main aim is to address the challenges of energy and climate transition and achieve carbon neutrality in 2050. The programme covers demanding challenges falling within the principal EU strategic objectives, such as adaptation to climate change, risk prevention and disaster resilience, and the transition to a circular economy and sustainable urban mobility.

The programme includes Specific Objectives (SO) closely related to Policy Objectives 2 and 3 – a greener Europe and a more connected Europe:

- SO 2.3 Develop smart energy systems, grids and storage outside of TEN-E
- SO 2.4 Promote adaptation to climate change, risk prevention and disaster resilience, taking into account ecosystem-based approaches
- SO 2.6 Promote transition to a circular and resource-efficient economy
- SO 2.8 Promote sustainable multimodal urban mobility as part of the transition to a carbon-neutral economy
- SO 3.1 Develop a climate-resilient, smart, safe, sustainable and intermodal TEN-T.

The programme strategy also aligns with the European Ecological Pact, which prioritises sustainability to create a modern, competitive and resource-efficient economy.

The Sustainability 2030 Programme is one of twelve programmes designed to operationalise Portugal 2030, the primary national strategy for the 2021-2027 programming period. Portugal 2030 outlines the main strategic objectives guiding the elaboration and implementation of the EU funds included in the Common Provision Regulation (CPR), namely the ERDF, CF, ESF+, JTF, EMFAF, AMIF, BMVI and ISF.

Considering the five POs of the Cohesion Policy, the Sustainability 2030 Programme was developed within this framework to promote interventions related to PO2 and PO3.

COORDINATION MECHANISM



Portugal's governance system features a robust coordinating institution for **Cohesion Policy funds**. The AD&C, which operates independently with its own assets, is tasked with coordinating regional development policy and overseeing the Cohesion Policy funds nationwide. Operating within the indirect administration of the State and under the supervision of the Presidency of the Council of Ministers, the AD&C's composition ensures the participation of social partners, public services and bodies responsible for implementing critical public policies supported by Cohesion Policy funds.

The AD&C organises monthly meetings with all Managing Authorities (MA), facilitating mutual coordination and allowing the MAs to discuss key aspects of coordination.

Additionally, a unified information system, facilitated by a centralised data hub, reorganises data management for all programme authorities. This ensures that MAs consistently have a clear and comprehensive understanding of programme implementation at the grassroots level.

The AD&C also coordinates several articulation networks in the Portuguese system. These networks monitor the capacity-building measures carried out by all programme authorities and stakeholders involved in implementing European funds in their respective areas of activity and make recommendations on their respective structuring projects whenever justified. These networks include all MAs and are organised according to programming cycles and topics, such as R&D&I, climate change, green innovation, etc.

In the case of the Sustainability 2030 Programme, the articulation network supporting the programme is the Climate Action and Sustainability network, which ensures coordination among MA to align the notice plan for submitting applications and to develop and implement other management instruments. This coordination network holds very active monthly meetings.

The Ministry of Environment and Climate Action, in charge of environmental and climate investments under the NRRP and Cohesion Fund (CF), has decided that NRRP interventions for thematic environmental areas will be managed by the Environment Fund unit within the Ministry's General Secretariat. The programme MA also participates in the Ministry's General Secretariat. Therefore, coordination is inherently robust as the political and technical management decisions regarding the CF programme and NRRP interventions are taken by the units within the same structure.

Communication and the exchange of information occur very easily at both formal and informal levels. A formal structure for coordination between Cohesion policy funds and RRF has been established through a protocol between the two units to regulate joint actions. Additionally, beneficiaries of CF funding will not be eligible for benefits under the RRF, ensuring there is no risk of duplicate financing.

The situation is different for other EU funds and instruments. In the case of LIFE, the programme is managed and directed by the European Commission. Two structures in Portugal provide support and coordination for supported projects: the Environment Agency and the Nature Conservation Institute. The latter institution has always been interested in finding synergies with the other Cohesion Policy funds, but there are no formal setups for this cooperation.

The State secretaries and the Minister constantly coordinate to clarify whether support from the CF is necessary in addition to other funds. However, there is no structured coordination mechanism in place for all EU funds and instruments.

Although the Monitoring Committee (MC) of the Sustainable 2030 programme is not *'the'* primary tool for supporting coordination among funds, it serves as an ideal forum for discussing the interplay between funds and public policies, as it brings together key institutions responsible for the policies funded by the Cohesion Policy, along with representatives from regulatory bodies. The MC connects the programme and the main stakeholders from civil society and academia, but it is not a tool for coordination with other funds. The articulation network and the AD&C play a central role in the coordination and exchange of information with other EU programmes and instruments. As for the NRRP, the political and technical decision to centralise the management of interventions supported by this programme and the NRRP strand dedicated to climate change and adaptation within the same Ministry enhances coordination.

The dedicated website Portugal 2030 has been set up to inform beneficiaries of the potential opportunities offered by all PT programmes, including the Sustainability 2030 programme. This comprehensive website provides detailed information on all programmes, including current calls and their respective timing. The entire calls plan was released at the end of September 2023, making all currently open calls accessible through the website.



Romania

Programme name Social Inclusion and Dignity

Programme IC 2021RO05FFPR001

Fund ERDF/ESF+

Programme budget EUR 4.23 billion

Managing Authority Ministry of European Investments and Projects



KEY ELEMENTS

The Social Inclusion and Dignity Programme (PIDS), supported by the ERDF and ESF+, is managed by the Ministry of Investment and European Projects (MIPE). MIPE also ensures coordination with the other funds.

The main takeaways from this practice are the following:

- The national programme Managing Authority (MA) is involved in the Coordination Committee for the Management of the Partnership Agreement (CCMPA) providing strategic direction in terms of Cohesion Policy fund deployment.
- The Monitoring Committee (MC) is an essential tool for coordination, as it involves representatives of other ministries implementing complementary actions in relation to the programme and relevant stakeholders.
- The programme MA elaborates guidelines for applicants to provide potential beneficiaries with information on synergetic actions to develop with other EU funds also adding the typologies of interventions that can be supported by the type of fund.

PROGRAMMING CONTEXT

The PIDS is a comprehensive initiative aimed at reducing poverty and addressing social exclusion. It integrates national and local strategies in line with the principles of the European Pillar of Social Rights.

More specifically, the main objectives of the programme are:

- Increasing access to social services for vulnerable people, especially from rural areas, through the establishment and development of social services at the local level;
- Increasing the quality and capacity of social services targeting vulnerable groups by providing well-trained specialist staff and adequate infrastructures at the local level;
- Reducing social exclusion for vulnerable groups by offering support and accessible services to help them overcome difficult situations;
- Increasing the capacity of local authorities to identify and assess the social needs of the community in a participatory way and to develop appropriate action plans.

PIDS's actions focus on specific key objectives such as community integration and the prevention of child poverty; social housing and support for the social economy in rural areas; support for persons with disabilities and in long-term care, and social services and material support.

The programme develops local development under community responsibility strategies (DLRC), designed to support local communities in developing integrated bottom-up approaches to achieve the above-mentioned goals.

This programme aligns with Creative Europe, Citizens, Equality, Rights and Values, and Single Market Programmes, emphasising citizens' quality of life and cultural heritage preservation. It complements the national Smart Growth, Digitalisation and Financial Instruments Programme (PCIDIF), supported by the ERDF. It will synergise with NRRP Pillar IV, focusing on social and territorial cohesion, particularly in tourism and culture.

COORDINATION MECHANISM



The Partnership Agreement (PA) is the most important instrument in Romania to ensure coordination and coherence among the EU funds and programmes.

Representatives of the PIDS MA actively participate in the Coordination Committee for the Management of the Partnership Agreement (CCMPA). The Committee has a permanent topic related to ensuring complementarity with other sources of funding on its agenda.

Moreover, since 2020, the Interministerial Committee for the coordination and monitoring of Romania's participation in European programmes and initiatives managed centrally by the European Commission has also been operational at the national level. The committee has the role of analysing the complementarity and synergies between them and the programmes financed from Cohesion Policy funds, as well as formulating proposals and recommendations to develop mechanisms for support for improving access to and increasing participation in European programmes and initiatives centrally managed by the European Commission. This mechanism supports the EU programme managers in finding the most suitable resources to create synergies with other EU funds. The MA of the PIDS participate in this Interministerial Committee.

At the programme level, the MC of PIDS includes the representatives of governmental bodies in charge of regulating the areas covered by the programme, such as the Ministry of Labour and Social Solidarity, the Ministry of Family, Youth and Equal Opportunities, as well as agencies dealing with disability, gender equality, Roma affairs and employment. It also includes civil society organisations representing the programme's areas of interest. The participation of public regulatory institutions is crucial for coordinating national policies in these areas and aligning them with initiatives funded by other sources.

The MC is crucial for ensuring coordination among the CPR funds, including the EAFRD, since it includes the Ministry of Agriculture.

The MIPE ensures coordination with the NRRP; it acts as the programme MA and the NRRP coordinator.

Furthermore, to ensure that double funding is avoided, the MIPE launched the Opportunities-EU platform, which integrates information on funds from different funding sources.

At the project level, the programme elaborates an instrument to facilitate potential beneficiaries' access to programme funds and better detail potential synergies between the projects and other EU funds in the application guidelines. This document is also elaborated by other programmes at the regional and national level. The MA of regional/national programmes details the specific conditions that projects should include in terms of complementarity with other EU programmes and funds. These guidelines are published before the launch of the investment calls.

Potential beneficiaries identify possible sources of funding to finance their projects as well as the possible demarcation between the funds. They can also propose amendments and highlight possible complementarity problems with other national funds/programmes or policies.

Demarcation among funds is mainly done at the level of the beneficiaries.

The application guidelines generally refer to a specific Priority or a Specific Objective (SO) for published calls. In some cases, it is also possible to consult beneficiary manuals regarding the general conditions for applying to the programme calls.

The application guidelines provide beneficiaries with information regarding the type of call, forms of support, budget allocation, actions supported by the call for projects and specific targets the programmes aim to reach. Moreover, indicators that need to be considered in the implementation of projects and conditions of eligibility are defined and explained.

The PIDS' application guidelines for the call related to SO04.11 (*"Expanding equal and timely access to quality, sustainable and affordable services, [...] ESF+"*), under P01 (*"Local development placed under community responsibility"*), deal with potential measures for community-led local development strategies (CLLD). CLLDs are funded by the EAFRD, ERDF, ESF+ and EMFAF, while single actions can be supported under two or more of the four EU funds simultaneously through the multi-funded CLLD concept.

CLLD is a tool to address specific challenges and problems in sub-regional territories managed by the community through local action groups (LAGs). Building on the 2014-2020 experience, CLLD was identified as a good practice in terms of an integrated approach to solving the problems faced by marginalised communities through a multi-sectoral approach, achieved by correlating and ensuring complementarity between investments in ERDF-type infrastructure and ESF+-type soft measures, and the EAFRD.

The application guidelines specify the types of expenses eligible for the ERDF, ESF+ and EAFRD. Overall, the types of calls intrinsically envisage synergies among these three funds.

Additional examples of guidelines for applicants from other regional and national programmes can be found.

The guidelines for applicants of the Nord-Est programme, supported by the ERDF, elaborated for calls for proposals within the programme priority 6: SO4.2 *"Improve equal access to quality and inclusive service in education [...]"*, points out that some projects can fall under the umbrella of the ESF+ type of activities, that address desegregation and promote social inclusion within the limit of 15% of the total budget of an infrastructure investment project. Therefore, the projects that include exclusively ESF+ type activities are ineligible.

In the case of the regional programme of the South Muntenia region, supported by the ERDF, the guidelines for applicants include additional documents which specify the distinction and complementarity between interventions that can be supported by the regional programme and investments that can be funded by other programmes as well as the NRRP. Demarcation and complementarity between the programme and the other funding sources are specified for every policy objective. For example, for PO 1 (*"Develop and increase research and innovation capabilities and technology adoption advance"*), it is indicated that demarcation and complementarity between the regional programme and Horizon Europe will be ensured through the National Strategy for Intelligent Specialisation 21-27: *"Synergy in the field of R&D&I between the funds and the Horizon Europe programme will be ensured through the National Strategy for Intelligent Specialization 2021-2027. Monitoring and stimulating the participation of Romanian beneficiaries in the Horizon Europe program will be ensured by the Ministry of Research, Innovation and Digitization, which is the National Contact Point for this programme. In addition, another document shows the communication strategy of the territory. [...] The demarcation between the two sources of financing consists mainly of the territorial dimension and the different scope of the projects: while the Horizon Europe Programme*

finances transnational projects without necessarily having a territorial approach, PR Sud Muntenia 2021-2027 finances projects with regional relevance.”



Italy

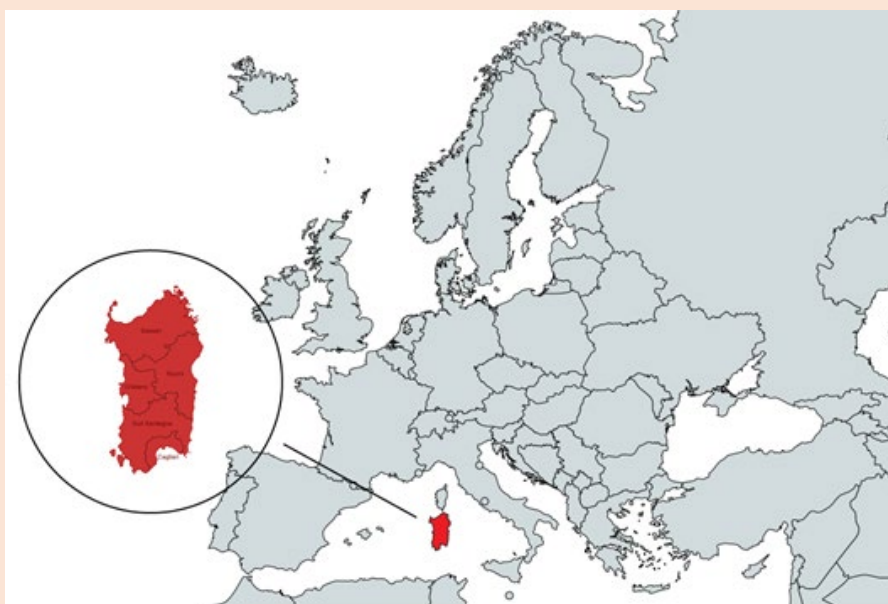
Programme name Sardinia ESF+ 2021-2027

Programme IC 2021IT05SFPR013

Fund **ESF+**

Programme budget **EUR 744.02 million**

Managing Authority **Department of Labour, Professional Training, Cooperation and Social Security**



KEY ELEMENTS

The Sardinian ESF+ Regional Programme 2021-2027 is notable for its complementarities with other national and EU funds and programmes in terms of coordination and synergies. The region has designed an overarching regional strategy that integrates various funds, matching them with potential national and EU programmes and instruments. The main takeaways from this practice are the following:

- The adoption of sustainable development goals (SDGs) and indicators as the overall strategic framework encompassing national and EU funds.
- The design of a 'coherence matrix' to identify possible synergies among different funding sources (including Cohesion Policy programmes).
- The establishment of a governance structure that includes all stakeholders to facilitate bottom-up coordination.

PROGRAMMING CONTEXT

The regional economic context has gradually recovered since 2019, with key indicators improving in ESF+ intervention areas. The onset of the COVID-19 crisis introduced new economic, employment, and social challenges, the full impact of which is still unfolding.

To address regional challenges, the ESF+ Regional Programme (PR) focuses on four priorities: employment; education, training, and skills; inclusion and combating poverty; and youth employment.

The PR seeks synergies, particularly with the ERDF's PO5, A Europe closer to citizens, by utilising urban and territorial development strategies to address issues such as marginality and poverty, enhance services, and foster employment and inclusion alongside cultural and environmental heritage development. Furthermore, the PR collaborates with the ERDF (notably PO4) to bolster the third sector in social services, advance local welfare systems, encourage social innovation (including social housing and school projects), and promote public-private partnerships, with municipalities playing a pivotal role in territorial planning. Additionally, cooperation with the EAFRD for vocational training, particularly in digital and ecological innovation, and with the EMFAF for skills development in the blue economy is planned.

Complementarity with relevant national PRs is facilitated through collaboration with Managing Authorities (MA) during the PR's implementation phase, even at the operational level. Moreover, the ESF+ PR is strategically positioned to complement the NRRP interventions and reforms, aiming for convergence towards shared objectives in employment, education, and social inclusion. Specifically, it seeks to expand the target group of ESF+ beneficiaries or allocate resources to areas within the thematic scope of the ESF+ that are also covered by the NRRP.

COORDINATION MECHANISM



Coordination between the ESF+ PR in the Sardinia Region and other programmes, especially at the national level, was addressed during the programme design phase, notwithstanding the challenges arising from the regional PR's more advanced status compared to those managed at the central level. This complexity arose from insufficient knowledge of national PRs, making it difficult to establish clear demarcation lines.

The region decided to promote coordination in a systematic structure by integrating the Regional Sustainable Development Strategy (SRSvS) with the planning of the ESF+ PR. The SRSvS is the overarching framework for integrating strategies developed at regional, national, and European levels. Anchored to the SDGs of the 2030 Agenda, the SRSvS emphasises the interconnectedness of 5 strategic themes, 34 strategic objectives, 104 lines of intervention, 571 actions, 102 indicators, and 41 targets.

Moreover, the Regional Department of Environmental Defence, the Department of Planning, and the research institute Fondazione Eni Enrico Mattei (FEEM) developed a study to create and identify the most effective programming options by investigating the interconnections between the 169 targets of the 2030 Agenda and the 182 intervention fields of the CPR funds.

A coherence matrix (see below) within the SRSvS links each Strategic Objective to the 2030 Agenda, the National Strategy for Sustainable Development, and regional opportunities from various European, national, and regional plans, programmes, and funds, such as the ERDF and ESF+. The figure below shows an example of the matrix for ERDF.

Sardigna2030 strategic themes	Operational Programmes financed by the ESF+ 2021-2027								
	OS I:	OS II:	OS III:	OS IIIbis:	OS IV:	OS V:	OS VI:	OS VII:	OS VIII:
	Improve access to employment	Modernising institutions and services of the job market	Promote a participation in the balanced job market	Promote the adaptation of workers, companies, and entrepreneurs to change	Improve the quality of the job market in education and training systems	Promote equal access e completion to an instruction e quality and inclusive training	promote Lifelong Learning	Encourage active inclusion	Promote integration socio-economic background of third-country nationals
A smarter Sardinia									
A more connected Sardinia									
A more social Sardinia									
A Sardinia closer to citizen									

N° Goal intercepted

4

3

2

1

0

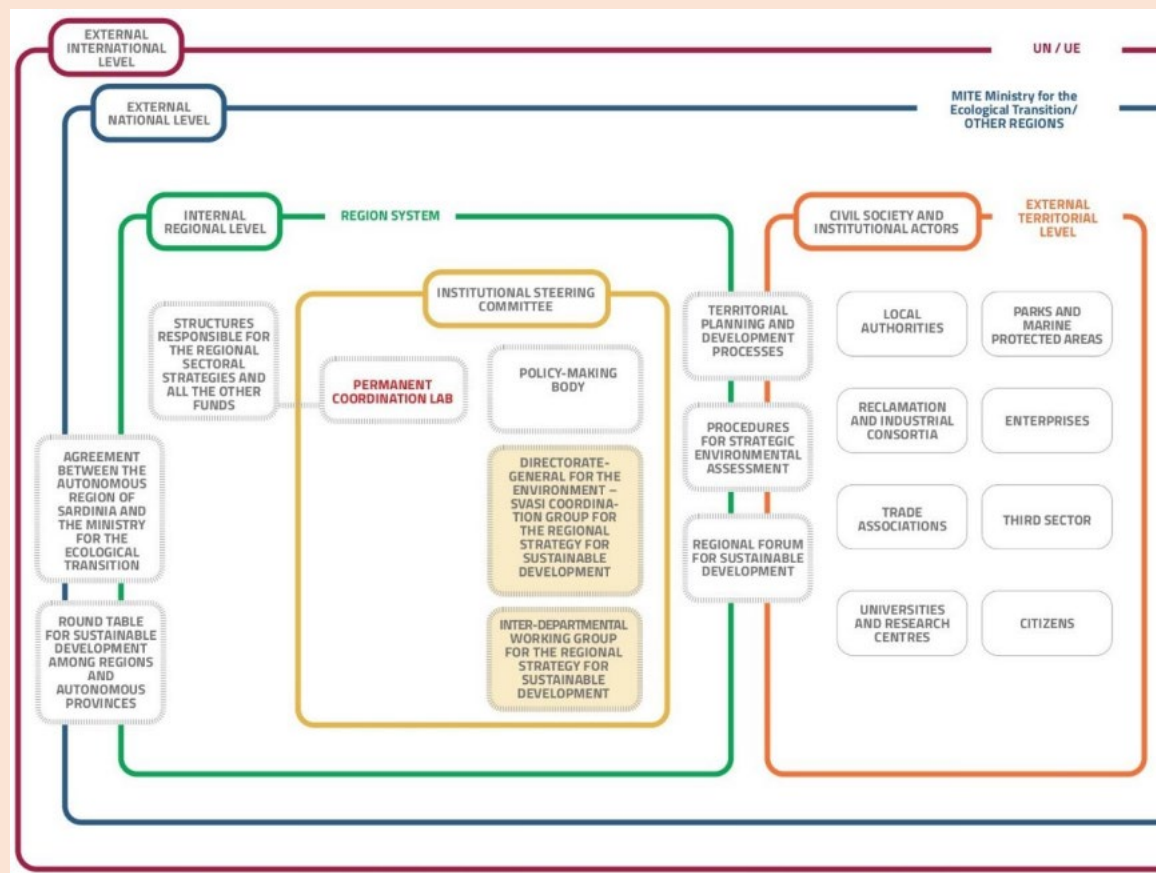
Source: Voluntary Local Review (VLR) of the Sardinia2030.

Moreover, the development of the PR involved a comprehensive stakeholder consultation process. Throughout the design phase, the ERDF and ESF+ MA organised round table discussions with institutional and economic partners, social bodies, and representatives of organised civil society, including the certifying and audit authorities of the PR and the inter-assessor working group. A steering committee, led by the regional secretary general, was established to guide the strategic objectives of the region, marking a significant step towards a unified programmatic approach across regional policies. This method fostered enhanced planning capabilities, a more robust representation of regional societal needs, enriched strategic definition through diverse knowledge and skills, and improved transparency in decision-making.

Stakeholders from the round table discussions play crucial roles in the implementation phase, contributing valuable insights for the success of interventions. During the programme's implementation, discussions continue through full sessions and thematic groups across all stages of programming, management, and monitoring to assess effectiveness and alignment with the ESF+ strategy.

The Region employs an integrated communication strategy, harmonising its efforts with those of other programmes to foster a unified EU vision and enhance synergy and effectiveness through institutional communication activities. The overall governance structure is illustrated in the figure below.

Figure 23: Governance structure of the SVSvS



Source: Source: Voluntary Local Review (VLR) of the Sardinia2030.



Spain

Programme name	Pluri-regional programme Spain ERDF 2021-2027
Programme IC	2021ES16RFPR001
Fund	ERDF
Programme budget	EUR 18.10 billion
Managing Authority	ERDF General Management Sub-directorate, under the General Directorate of European Funds - Ministry of Finance and Public Function



KEY ELEMENTS

The Spanish Pluri-regional ERDF Programme 2021-2027 presents significant features that ensure coordination and synergies with other CPR funds and EU funds and instruments.

The main takeaways from this practice are the following:

- The establishment of a governance structure which includes all the stakeholders to facilitate bottom-up coordination.
- Several operational arrangements to ensure coordination among CPR funds and the NRRP, including both formal guidelines and governance structures, as well

as informal channels to guarantee the exchange of information and data among the actors involved.

PROGRAMMING CONTEXT

For the 2021-2027 period, Spain will channel ERDF implementation through a national pluri-regional programme and 19 regional programmes with an overall budget of EUR 12.3 billion. A significant portion (55%) is designated for less developed regions, while 35% is for transitioning regions and 10% for more developed regions. The Ministry of Finance's Directorate General for European Funds, under the Secretariat General for European Funds, manages this programme.

The programme addresses all five Priority Objectives (POs), emphasising the digital and smart transformation of regional economies (PO1 – a smarter Europe). This entails promoting collaborative research, aiding technology transfer and supporting innovative startups aiming to incorporate emerging technologies into public services. This initiative is geared towards driving sustainable growth, boosting competitiveness, and creating jobs in small businesses.

Additionally, it commits to reducing energy emissions and shifting towards more sustainable solutions (PO2 – a greener Europe). Significant investments are directed towards renewable hydrogen and extensive renovations of public buildings to enhance energy efficiency. Furthermore, it introduces measures for climate change adaptation, disaster preparedness, sustainable water management, and nature conservation, benefiting citizens directly and contributing to a more resilient and sustainable environment.

Given its emphasis on the twin transition, the pluri-regional programme aligns naturally with the Spanish NRRP. Indeed, the NRRP addresses the initial phases of company project lifecycles, while the ERDF programme focuses on the later stages, enhancing business competitiveness. Additionally, the ERDF programme and the NRRP synergistically support sectors crucial to the Smart Specialisation Strategy (S3). Ultimately, the ERDF programme ensures the continuation of investments initiated by the NRRP, offering a coherent regional development perspective. In addition, the pluri-regional programme also seeks coordination with Horizon Europe (HE) projects, particularly those awarded the Seal of Excellence (SoE).

Synergies have been identified with the EAFRD, particularly within the framework of PO2, for interventions related to water infrastructures and irrigation systems. The programme will also act in synergy with ESF+ programmes to support interventions dedicated to fostering social cohesion.

To facilitate such collaboration, the programme has instituted several mechanisms, with the Comité de Coordinación de Fondos playing a crucial role in steering these efforts. Moreover, thematic networks ensure consistent collaboration among CPR fund-Managing Authorities for a cohesive approach across Spain's territories.

COORDINATION MECHANISM



The case of the pluri-regional programme coordination showcases two approaches: formal and informal. Formal coordination is achieved through several platforms. The most relevant is the Comité de Coordinación de Fondos, which was set up at the national level and institutionalises coordination efforts, ensuring cohesive planning and execution across these initiatives. Informally, and arguably more crucially, day-to-day communication and collaboration occur through informal relationships, underscoring the significance of both structured processes and the flexibility of informal networks in effective programme coordination.

The pluri-regional programme also demonstrates that coordination can be enhanced through a 'bottom-up' approach. This means that in addition to formal arrangements and informal relationships among programme authorities (a top-down approach), engaging stakeholders is crucial for deeper integration. This involvement ensures that coordination is not only dictated by policymakers but is also influenced by those directly affected by and involved in the projects, fostering more comprehensive and effective synergies across the different levels of programme implementation.

Formal coordination approach

The programme operates under the Ministry of Finance and is specifically managed by the Directorate General for European Funds within the Secretariat General for European Funds. This organisational structure includes the Directorate General for the NRRP, highlighting a significant coordination advantage since both the Cohesion policy programmes and NRRP management are housed together. This setup facilitates structured coordination across the CPR funds and with the NRRP, ensuring a cohesive approach to fund management and strategic alignment within the same organisational framework.

It is also noteworthy how programme authorities managing CPR and Cohesion Policy funds achieve coordination and exchange strategic insights through the Fund Coordination Committee (Comité de Coordinación de Fondos). This committee, building on practices that emerged during the 2007-2013 and 2014-2020 programming periods, convenes formally four times a year, offering a structured forum for aligning all CPR funds. Hosted by the ERDF's General Sub-directorate of Programming and Evaluation, it is a pivotal forum for aligning policies supported by CPR funds with other EU policies and instruments, enhancing coordinated programming and amplifying the collective impact. In this programming period, the Committee also integrates NRRP authorities to identify synergies in planning and fund implementation. Furthermore, the ERDF Spanish pluri-regional programme's coordination is formalised through the participation of multiple Managing Authorities (MAs) in its Monitoring Committee (MC), ensuring comprehensive collaboration across various programmes.

The internal guideline on synergy issued by the Secretary General of the Ministry of Finance is an interesting form of coordination. This guideline directs ministries to adhere to the 'one project, one fund' principle to prevent double funding. It is crucial to determine when to utilise Cohesion Policy funds versus the NRRP. Spain's programming aligns with the RRF and ERDF timelines, commencing with the RRF for immediate projects and transitioning to the ERDF for those requiring more time. This strategic approach, aligned with the NRRP scope during the ERDF programme design, prevents overlap through careful timing.

Informal coordination approach

Coordination between the ERDF and NRRP happens on a daily basis, as the institutions managing these funds are both part of the Secretary General for European Funds under the Ministry of Finance. The Directorate General for European Funds, in charge of the ERDF pluri-regional programme, and the Directorate General for the NRRP have staff members who know each other very well and whose offices are adjacent to one another. Coordination and communication are constant, both formally and informally. Coordination and the exchange of information happen regularly, even without dedicated bodies to take care of it. Working relationships and a trust-based environment facilitate exchanges.

For example, when drafting the initial RRF programme and thereafter through its modifications in the Addendum, the directorates working on the RRF and ERDF consulted each other extensively on how to achieve synergies with projects.

In addition, these directorates work with the other ministries responsible for sectorial policies. For example, when determining which transport projects should be funded by the RRF or ERDF, the Ministry of Transport is consulted alongside the units in charge of the ERDF and RRF within the Ministry of EU funds. The Ministry of Transport is equipped to decide which projects to include under one fund and which to support through other funds, depending on the characteristics of each fund, the facilities and the timeline.

The Ministry in charge of a specific policy has an overarching view of the projects. It determines how to manage them, controls implementation and assesses whether there are synergies and complementarities with other funds.

The case of coordination mechanisms between the programme and the EU funds and instruments under direct and indirect management is different. There is no formal channel to ensure constant and systematic coordination. Nevertheless, staff working with funds and programmes supported by the EU budget know each other and informal channels of communication and information exchange are present. Moreover, sectoral units within the ministries in charge of the activities supported by EU funds under direct and indirect management informally update the units and departments working with CPR funds. This collaborative approach is observed in the case of HE.

Coordination with the programme stakeholders

Coordination begins during the programme design phase, involving economic and social partners, research institutions, NGOs, and civil society actors to develop the programme. This inclusive approach helps to identify complementarity needs and establish necessary connections precisely.

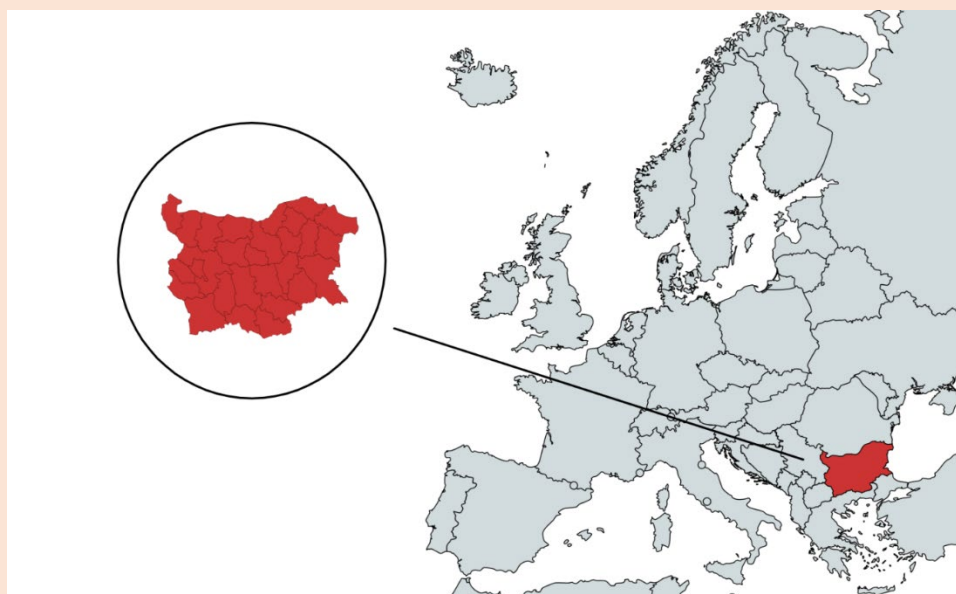
The consultation process extends into the implementation phase, ensuring ongoing engagement. Stakeholders are categorised into groups based on their nature and level of involvement, including general partners, NGOs (including environmental ones), universities and research organisations, civil society, regional actors, ministry representatives, thematic networks, and representatives of other CPR and EU funds and programs. This structured stakeholder involvement enriches the programme's development and execution, promoting a comprehensive and integrated approach to meeting regional needs and leveraging diverse expertise and perspectives.

Annex G2 - Synergies



Bulgaria

Programme name	Research, Innovation and Digitalisation for Smart Transformation
Programme IC	2021BG16RFPR002
Fund	ERDF
Programme budget	EUR 1.09 billion
Managing Authority	Ministry of innovation and growth - Chief Directorate of the European funds for competitiveness



KEY ELEMENTS

The Program Research, Innovation, and Digitalisation for Smart Transformation (PRIDST) in Bulgaria stands out for its emphasis on establishing complementarities through synergies with other EU funds and programmes. In addition to coordinating with other national programmes within the framework of the Smart Specialization Strategy, the programme establishes robust synergies with EU programmes by leveraging the Seal of Excellence (SoE) and cumulative funding. The main takeaways from this practice are the following:

- Design of concurrent and phased synergies: the PRIDST programme aims to leverage synergies with the Digital Europe Programme (DEP) and Horizon Europe (HE) to support European Digital Innovation Hubs (EDIHs). This includes providing ERDF resources to hubs already funded by DEP and supporting additional hubs selected through the SoE mechanism.
- Operational alignment: Through synergies with DEP and HE, the EDIHs align with the intervention logic of PRIDST. This ensures that investments in research and innovation are connected with investments in SME digitalisation, focusing on enhancing data quality and quantity, bolstering cybersecurity, and fostering trust.

PROGRAMMING CONTEXT

The national programme PRIDST 2021-2027 delivers the National Innovation Strategy for Smart Specialization 2021-2027. Therefore, its primary goal is to enhance Bulgaria's innovation performance and to bridge the digital divide.

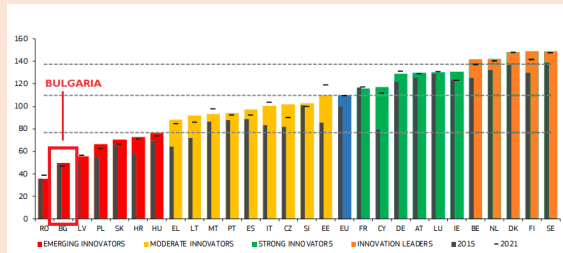
Indeed, as shown in the chart below, the European Innovation Scoreboard 2022¹⁰¹ ranks Bulgaria among the 'emerging' innovators with an aggregated innovation index of 45.2%¹⁰².

Likewise, in the field of digitisation, where progress is tracked by the European Commission through the Digital Economy and Society Index (DESI), Bulgaria ranks 26th out of 27 countries. This highlights the insufficient digitalisation of the human capital and the public sector, alongside the low levels of connectivity and integration of digital technology within enterprises.

¹⁰¹ The European Innovation Scoreboard ranks the Member States based on 32 indicators, from 'emerging innovators', with performance levels below 70% of the EU average, to 'innovation leaders', with performance levels exceeding 125% of the EU average.

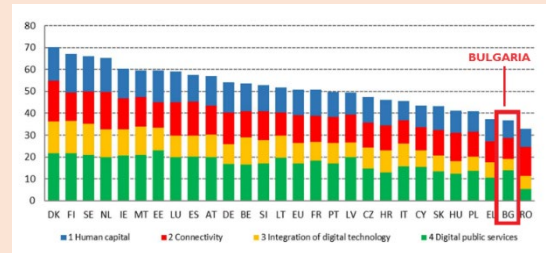
¹⁰² Bulgarian performance is unsatisfactory even when compared to the average among 'emerging' innovators (50.0%). Moreover, the increase in performance is growing at a lower rate (1.6% points) than that observed in the EU, which has seen a rise of 9.9 percentage points, with the consequence of the expansion of the performance gap between the country and the EU.

Figure 25. Performance of EU Member States' innovation systems



Source: European Commission, 'European innovation scoreboard 2022'

Figure 26. Digital Economy and Society Index (DESI) 2021 ranking



Source: Republic of Bulgaria, Ministry of Innovation and Growth, 'Support for European Digital Innovation Hubs in Bulgaria'

As indicated in the graphics above, PRIDST faces two major challenges, one related to innovation and the other linked to digitalisation. Therefore, programme resources must be optimised and leveraged through complementarities with other national and European programmes.

PRIDST has responded to this need by seeking solid, effective coordination and synergies. Coordination has been sought primarily with other national programmes funded by Cohesion Policy funds, while synergies are sought with HE and the DEP.

More specifically, the programme focuses on achieving these goals under priority 1, 'Sustainable development of the Bulgarian research and innovation ecosystem', with the specific objective RSO1.1. 'Development and strengthening of capacity for research and innovation and the deployment of advanced technologies (ERDF)'. In particular, under:

- Action 2, 'Stimulation of international scientific cooperation and participation in the framework programs of the EU,' envisages two specific types of synergies: concurrent and phased. The first type of macro-synergy, 'concurrent', pertains to initiatives realised through cumulative funding for projects led by Bulgarian entities and supported by HE (under the category 'Expanding participation and strengthening the European research space'). The second type, 'phased', encompasses the utilisation of the SoE to finance projects that have satisfied the evaluation criteria within HE, specifically for Twinning and ERA Chairs initiatives.
- Action 4, 'Internationalization of innovations in Bulgaria and ensuring synergy with Horizon Europe and Digital Europe programmes', tackles the limited adoption of digital technologies in the Bulgarian economy and society. In this case, the SoE and cumulative funding are implemented through the European Digital Innovation Hubs (EDIHs), as illustrated in more depth below.

SYNERGIES



Under Action 4, two types of synergies are planned with HE and the DEP to support the creation of **EDIHs** offering services tailored to specific focuses and expertise while aiding the local private and public sectors in digital and green transformation.

The EDIHs are part of the European Digital Innovation Network (EDIH network), which consists of 228 EDIHs, with 151 receiving funding from the DEP and national or regional

resources funding the remaining 77. The primary objective of the network is to improve the digital capabilities of both companies and public sector organisations. Furthermore, EDIHs are essential for the delivery of:

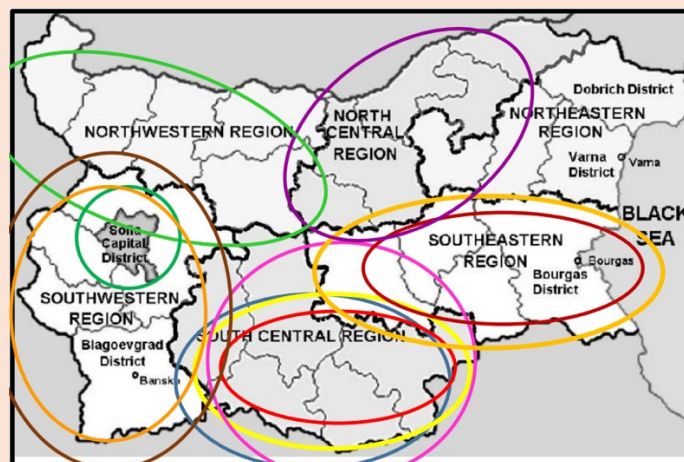
- Innovation Strategy for Smart Specialization 2021-2027 (ISSS).
- National Strategy for Small and Medium Enterprises 2021-2027 (NSSMEs).
- National Program 'Digital Bulgaria' 2025.

Following the approval of the DEP work programme, the initial restricted call for EDIHs was concluded, resulting in the selection of 136 projects. Subsequently, a second call was initiated to complement the EDIH selection and address network gaps, leading to the selection of an additional 15 hubs. Funding for this initiative is split evenly between DEP (providing 50%) and contributions from Member States, associated countries, their regions, and private sources (providing the remaining 50%). National governments and regional authorities played a pivotal role in the EDIH selection process by identifying suitable candidates to respond to the European calls for proposals.

Therefore, PRIDST aims to support those EDIHs already funded by the DEP call through cumulative funding and to assist those selected but not funded through the SoE (phased synergy). In total, 12 EDIHs will be supported through the Programme in synergy with the DEP and HE.

Cumulative synergy will be implemented with 50% funding by the DEP for 4 EDIHs (CYBER4AllSTAR, EDICS, AgroDigiRise, SynGReDiT) chosen by the European Commission to enter into grant agreements. Cumulative synergy enables support for the same project or operation through funding from two distinct sources of the Union budget, as long as the funding does not overlap or cover identical costs. This approach allows PRIDST to provide a more comprehensive financial framework by combining resources from different sources without duplicating expenses.

Figure 27. Bulgarian EDIHs Network



Source: Republic of Bulgaria, Ministry of Innovation and Growth, 'Support for European Digital Innovation Hubs in Bulgaria'

The other 8 (UDIH 4 EU, ADi4SMEs, RCDSI NCIZ, InnovationAmp, Next-Gen-BioTechEDIH, EDIH DIGIHUB, MECH-E-DIH, EDIH-NWACB) have earned the **SoE** from the European Commission and will be entirely funded by the PRIDST. The SoE acknowledges the high quality of these projects, enabling them to leverage the analytical work and expertise of the DEP despite initial budget limitations. This recognition allows for budget optimisation, enhances the quality of the initiative, saves selection time and avoids sunk costs related to non-selection.

The EDIHs will offer specialised services, concentrating on distinct areas of expertise, supporting both the local private and public sectors in digital and green transformation

and fostering the research capacity and infrastructure of research organisations, universities, and SMEs.

Through synergies with the DEP and HE, the EDIHs fully embody the intervention logic of PRIDST, which aims to enhance the connection between investments in research and innovation and investments in SME digitalisation. This focus includes improving the quality and quantity of data, bolstering cybersecurity, and fostering trust, thereby creating a conducive digital environment across public, scientific, and private sectors. Collaboration facilitated by EDIHs is expected to expedite the rate of economic, digital, and social transformation.



Cyprus

Programme name	Programme Cyprus – AMIF
Programme IC	2021CY65AMPR001
Fund	AMIF
Programme budget	EUR 71.65 million
Managing Authority	European Funds Unit, Ministry of Interior



KEY ELEMENTS

The national AMIF programme presents synergies with the other HOME funds, with the ESF+, which is also built on the experience of the previous programming period, and with the NRRP.

The effective and efficient implementation of these synergies is based on centralised and structured coordination among ESF+ and HOME Managing Authorities (MA).

PROGRAMMING CONTEXT

The AMIF programme responds to challenges and difficulties that arise in the MS due to migratory flows and related criticisms characterising the national territory, as observed in the previous programming period. The situation in Cyprus underscores the migration challenges: for the fifth consecutive year, the MS has retained its position as the top recipient among EU MSs in terms of first-time asylum applications in proportion to its population. By December 2020, around 7.000 new applicants had been registered in the MS, with Syrians being the most significant nationality in asylum applications. Although 2020 registered fewer asylum applications due to the COVID-19 pandemic, 2021 saw an increase culminating in 13.235, and in July 2022, applications were already equal to 13.818.

The AMIF programme intends to address the challenges of accessing and supporting asylum seekers with application requests, facilitating access to reception centres, and providing access to services for social inclusion.

In light of this, the programme aims to reinforce the following measures:

- support for asylum application requests,
- support for access reception centres,
- horizontal support.

More specifically, the programme will intervene to:

- Improve information exchange, also enhancing the links between national IT databases and EU databases (i.e. Eurodac),
- Increase the number of staff working in centres dedicated to supporting asylum seekers,
- Support reception centres and increase their capacity, with particular attention to the Kofinou, Limnes and Nicosia Reception Centres,
- Implement a possible housing option for vulnerable persons.

Synergies with the national programme supported by the ESF+ and the other HOME funds are envisaged, particularly with the ISF. Moreover, the programme also intends to create synergies with the NRRP, in particular through policy component 5.2, 'Labour Market, Social Protection and Inclusion', which aims to provide support for the provision of care and safeguarding the rights of asylum seekers and refugees. The NRRP intends to create an additional eight centres to host minors under the management of the Direction of Social Welfare Services.

Effective implementation of synergies relies on structured coordination mechanisms, drawing on previous programming periods (2007-2013 and 2014-2020) and extending throughout the 2021-2027 period. This approach is reinforced by the incorporation of the HOME funds into the CPR Regulation.

As detailed in the Partnership Agreement (PA), a framework of cooperation has been established between the MAs of the Cohesion Policy funds and the HOME funds, represented respectively by the DG Development and the European Funds Unit of the Ministry of Interior. This framework facilitates meetings and the exchange of views throughout the preparation of programming documents and the programme implementation, with the aim of optimising resources. In addition, both MAs participate in the Monitoring Committees (MC) of the respective programmes. Indeed, the MC is used to ensure coordination and consequently avoid overlapping between the actions implemented under each EU Fund and use the available resources more effectively.

SYNERGIES

The national AMIF programme leverages synergies with other funds. Notably, a single MA was appointed to manage the AMIF, BMVI and ISF programmes. This mechanism strengthens coordination and the ability of programme managers to design activities that can complement each other and amplify their added value.

Designing synergic interventions requires a structured coordination mechanism that involves exchange among the programme managers and relevant stakeholders. Firstly, the MA collects written suggestions for potential projects and needs submitted by relevant stakeholders and public departments during the programme implementation stage. Furthermore, the MA responsible for the AMIF, BMVI, and ISF engages primarily with the Directorate of General Growth, serving as the ESF+ MA, designing and planning implementation actions to support synergies with the ESF+.

An example of synergy between the AMIF and ESF+ was present in the AMIF 2014-2020. The AMIF collaborated in funding projects alongside other funds, with notable interactions primarily occurring between the ESF+ and AMIF. Adequate demarcation and mechanisms were in place to facilitate these synergies. One such mechanism enabling the implementation of synergies is particularly evident in the provision of Greek language lessons for minors and adults, as well as mediation services in schools supported by both AMIF and ESF+. In 2018, 588 teachers and education staff received skills training on managing diversity and reinforcing Greek language learning and multilingualism.

The Ministry of Education plays a critical role in managing this intervention by coordinating the two projects to offer courses at different schools for diverse student groups and at varied times, thereby addressing a comprehensive range of language integration needs. Building on the positive experience of the 2014-2020 period, the intervention will continue, adopting the same approach and thus the same intervention logic and synergy. The Ministry of Education has been consulted and is in the process of identifying needs and gaps which will not be addressed by other resources so that actions under the AMIF will act in a complementary manner to other measures/ actions implemented for migrant students, both adults and minors.

Another example of synergy is seen between the AMIF and ISF. Based on the positive experience of the previous programming period and considering current needs, the AMIF and ISF coordinate to support operations at the Pournaras Reception Centre. More specifically, this synergy also envisages the implementation of the Emergency Assistance Grant Scheme (EMAS), which is directly implemented by the EC. This partnership is a prime example of effectively delivering essential services. The centre upgrade will encompass an extensive renovation of the initial reception procedures area, a significant increase in accommodation capacity with the addition of 1.184 places, and the creation of adequate quarantine facilities. The three key objectives guiding the extensive construction efforts are the integration of protective measures, the assurance of environmental sustainability, and the enhancement of safety protocol.

As for synergies between the NRRP and AMIF, the programme clearly mentions that, due to the large number of migrant arrivals in Cyprus, a part of the NRRP can be allocated to cover these costs. Moreover, the NRRP has included specific funds under policy component 5.2, 'Labour Market, Social Protection and Inclusion,' to support centres for addiction services and treatment. Thanks to the NRRP, CY will be able to increase the reception capacity of those centres that are not currently supported by AMIF.



Lithuania

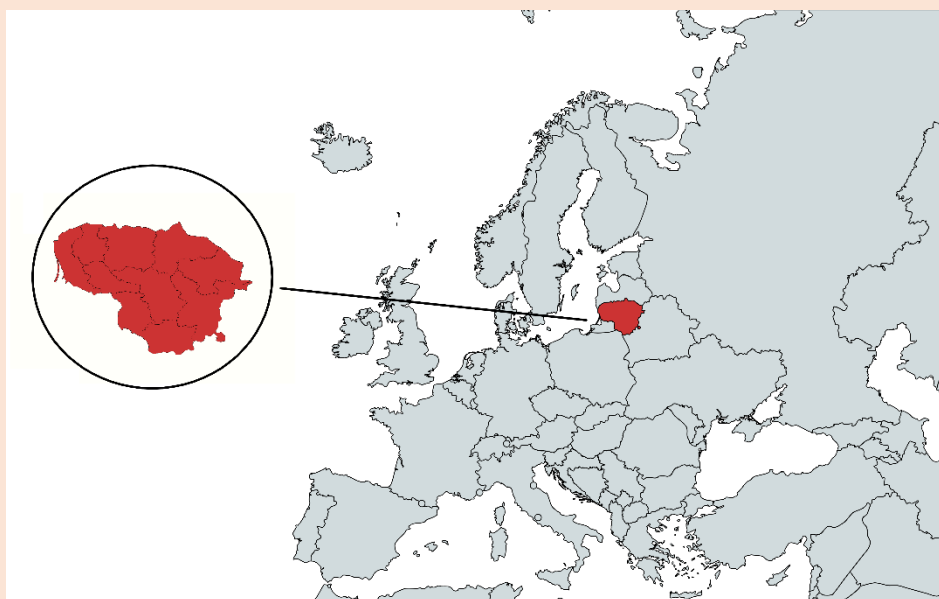
Programme name Programme for the European Union Funds' Investments in 2021–2027

Programme IC 2021LT16FFPR001

Fund ERDF/ESF+/CF/JTF

Programme budget EUR 7.74 billion

Managing Authority Ministry of Finance



KEY ELEMENTS

The Programme for the European Union Funds' Investments in 2021–2027 is notable for establishing complementarities in terms of synergies. The programme designs an overarching strategy that integrates various funds, aligning them with potential national and EU programmes and instruments. The main takeaways from this practice are the following:

- Establishing complementarity involves an overall strategic programme approach to align objectives and funding mechanisms, collectively support broader EU development goals and avoid overlapping.
- Establishing combined synergies between Cohesion Policy Funds, the National Recovery and Resilience Plan (NRRP), and the Connecting European Facility (CEF) for a complex transnational communication network requires a collaborative framework. This framework leverages the strengths of each funding source to support the project's multifaceted needs, ensuring efficient resource utilisation and maximising impact.

PROGRAMMING CONTEXT

**ES fondų investicijos
2021-2027 m.**



The Programme for the European Union Funds' Investments in 2021–2027, managed by the Ministry of Finance, is articulated into eight priorities: Smarter Lithuania (Priority 1), Greener Lithuania (Priority 2), Better connected Lithuania (Priority 3), More socially responsible Lithuania (Priority 4), Lithuania closer to its citizens (Priority 5), Social innovations (Priority 6), Digital infrastructures (Priority 7), and Sustainable mobility (Priority 8).

Almost 47% of the programme funds are allocated to investments in innovation and green transition, focusing on areas that will create the greatest added value for the Lithuanian economy in the long term.

Additionally, 30% of the programme funds will target measures strengthening human capital, addressing the challenges of social inclusion, improving achievements in education, health, and culture and ensuring high employment rates in the labour market.

Lithuania's specific geographical location and size naturally drive the country to seek integration with other Member States (MS) in the Baltic area. To enhance integration in the Baltic Sea Region's economic sector, the programme adopts a dual approach: firstly, it aims to strengthen economic collaboration by boosting R&D&I, accelerating digitalisation, and enhancing the competitiveness and market position of small businesses. Secondly, the programme emphasises significant investment in physical connectivity within the Trans-European Network (TEN-T), with a particular focus on broadband infrastructure development.

Synergies to boost the R&D&I sector are implemented in Priority 1 'Smarter Lithuania', for example in:

- In Specific Objective (SO) 1.1 'To develop and strengthen research and innovation capacities and the use of advanced technologies', the measures planned mainly aim at increasing investments in R&D&I, supporting the transfer of knowledge, boosting the development, acceleration and expansion of startups,

creating the conditions for supporting the transformation and innovation of SMEs, and encouraging their participation in international R&D&I initiatives. Financed by the ERDF, these investments also envisage interactions with other EU funds and instruments, such as **Horizon Europe (HE)**, **InvestEU**, and the **NRRP**. Specifically, the measures envisage participation in Twinning, Teaming projects, European partnerships, etc. Moreover, the SO also foresees the possibility of financing projects awarded with the Seal of Excellence (SoE) by HE.

- SO 1.2 'Harnessing the benefits of digitisation for citizens, businesses, research organisations and public authorities', funded by the ERDF, to support measures related to integration into EU strategic international value chains and the development of sustainable circular and high-impact technologies, with **synergies** between the **DEP** and **NRRP**.
- SO 1.3 'Strengthen sustainable growth and competitiveness of SMEs and job creation in SMEs, including through productive investment' contributes to increasing SMEs' productivity and competitiveness. It will also improve the conditions for business creation and growth in central and western Lithuania through synergies with **InvestEU**.

Moreover, the programme has approved a transfer to HE totaling EUR 18.5 million, specifically EUR 7.1 from the ERDF more developed region category and EUR 11.3 from the less developed category. The key motivation for this transfer was to encourage more active cooperation between stakeholders in scientific research and innovation at the international level and encourage Lithuanian applicants to take advantage of HE opportunities. The transfer mechanism offers enhanced flexibility, distinguishing it from previous arrangements. This multifaceted flexibility is instrumental for optimising the use of funds.

Regarding fostering logistic and communicational integration in the Baltic Sea Region, Priority: 7 Digital infrastructures, SO 1.5 Improving digital connectivity contributes to reducing the digital divide and introducing new digital technologies.

The use of the digital strand of the CEF is planned for implementing the international 5G transport corridors project. To this end, memoranda of cooperation have been signed with the other two Baltic countries and Poland. Moreover, the NRRP will be deployed to ensure the coverage and penetration of high-bandwidth electronic communication networks meeting the needs of digital businesses and adapted to the smooth development of 5G communication networks.

This case will be further illustrated in the next section.

SYNERGIES



Interventions planned under SO 1.5 of the programme are intended to enhance the provision and accessibility of ultra-high-speed networks in the market. This will facilitate extensive utilisation of products, services, and applications within the shared digital marketplace and directly stimulate the growth of the Lithuanian economy.

In particular, resources are dedicated to financing 5G networks for all urban territories and along the most relevant highways. This should ensure that all households have internet access at a speed of at least 100 Mbps and guarantee gigabit connectivity to all the main engines of social and economic progress, such as schools, major transport hubs and major public service providers, as well as digital-intensive companies. In 2020,

Lithuania approved the 5G development guidelines, encompassing the legal measures to deploy the reforms and investments to carry out the investments.

Moreover, the digital strand of the CEF will be used to implement the international 5G transport corridors project, which fits into the broader context of the **‘Rail Baltica’ project**. This project is one of the most significant TEN-T transport infrastructure initiatives aimed at integrating the Baltic States into the broader European rail network, establishing seamless connectivity among key cities, including Helsinki, Tallinn, Pärnu, Riga, Panevežys, Kaunas, Vilnius, and Warsaw. **‘Rail Baltica’** is one of the most important transit arteries in Eastern Europe, being the only transport corridor in the Republic of Lithuania, Republic of Latvia and Republic of Estonia for transporting goods in a North-South direction.

Figure 27. 5G Cross-border Corridors for Connected and Automated Mobility

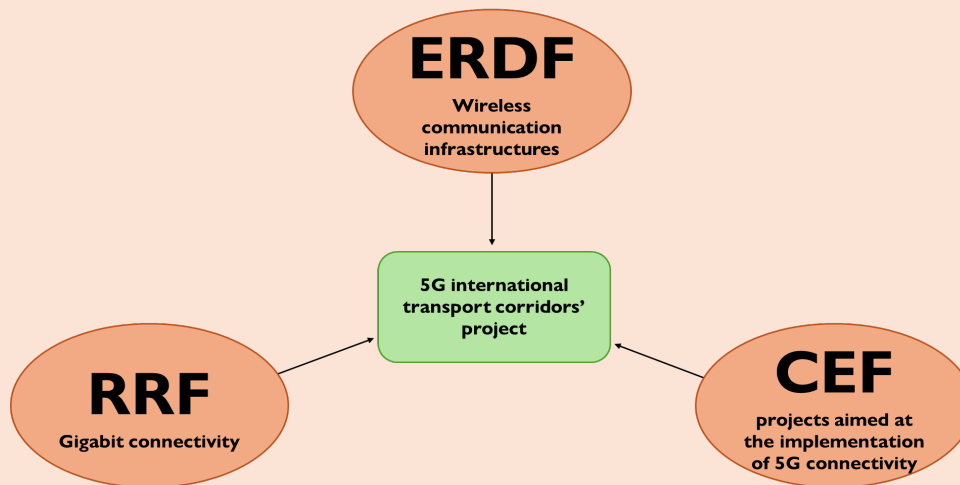


Source: European Commission, *‘Shaping Europe’s digital future: 5G cross-border corridors’*

To this end, three different instruments are used: the ERDF, RRF and CEF. Through **combined synergy**, the **ERDF** will be used to develop wireless communication infrastructures in all urban territories and major terrestrial transport paths. The **RRF** will fund gigabit connectivity, that is, internet connection with a speed of at least 1 Gbps in places with social and economic development initiatives, specifically through investments in fibre optic infrastructure. **CEF Digital** (EUR 286 MLN) will be used to fund the implementation of the 5G international transport corridors project.

CEF Digital will fund projects to facilitate the deployment of 5G infrastructure along cross-border corridors to guarantee the seamless provision of 5G services across borders, particularly in crucial industry sectors such as connected and automated mobility and automated manufacturing operations. These investments will be allocated explicitly to motorways, ports, railways, and inland waterways, enabling the implementation of innovative services for both passenger and freight transport as well as funding projects that deploy 5G connectivity for smart communities, for example, schools, hospitals, and community centres to improve access to online services and digital skills. This approach allows all resources to be leveraged to finance one large and vital infrastructure project.

Figure 28. Type of funds and measures funded



Source: own elaboration

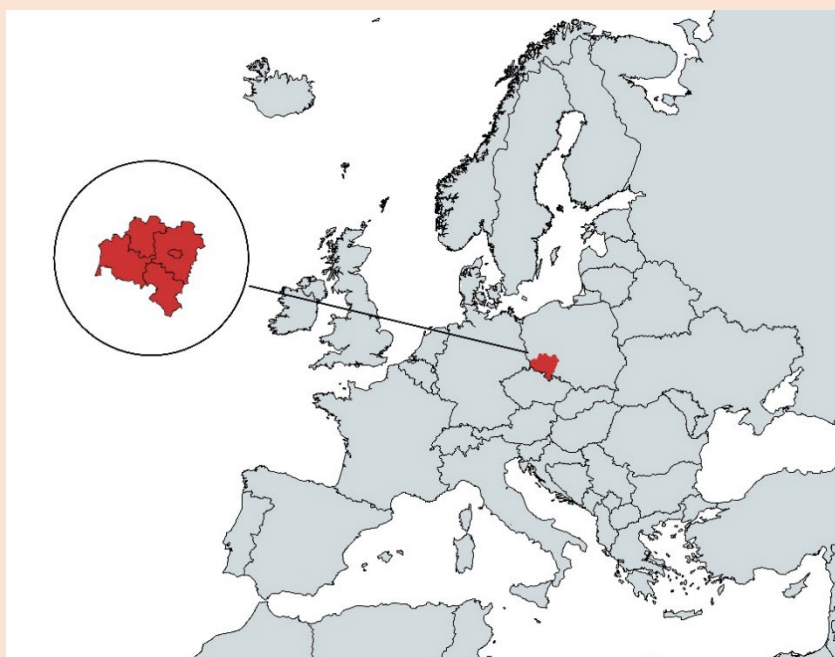
The project 'The development of 5G network infrastructure along the TEN-T Via Baltica and Rail Baltica' was prepared in Lithuania. Through this initiative, areas lacking adequate coverage, often referred to as white spots, have been identified. It has been determined that to establish a 5G corridor along the Via Baltica in Lithuania, an additional 32 masts need to be erected, along with the implementation of the requisite communication infrastructure utilising optical cable connections. The Lithuanian project envisages the installation of masts reaching a height of 30 meters. Furthermore, the project includes a supplementary development concept that entails the installation of an additional 18 masts.

5G connectivity and Connected Automated Mobility (CAM) in major TEN-T transport paths will ensure seamless 5G connectivity along Lithuania's primary transport corridors, Via-Baltica and Rail-Baltica, by constructing the necessary mobile infrastructure, including ducts, fibre optics for transmission, towers, electricity supply, and other essential components tailored for 5G technology. This initiative aims to foster an environment conducive to the deployment of 5G, facilitating CAM, which represents a significant leap towards sustainable transportation and enhanced traffic safety. Moreover, it holds the potential to unlock various innovative digital services. Additionally, the investments seek to establish a secure and safe environment for citizens to fully experience the advantages of connected and automated mobility.



Poland

Programme name	European Funds for Dolny Śląsk 2021-2027
Programme IC	2021PL16FFPR001
Fund	ERDF/ESF+/JTF
Programme budget	EUR 3.31billion
Managing Authority	Lower Silesian Voivodship supported by the Marshal's Office of the Lower Silesian Voivodship in Wrocław



KEY ELEMENTS

The European Funds for Dolny Śląsk 2021-2027 is a regional multi-fund programme supported by the ERDF, ESF+ and JTF.

The main takeaways from this practice are the following:

- Being multi-fund, the regional programme envisages synergies within the programme and structured synergies with the national programmes, mainly the

European Funds for Infrastructure, Climate, Environment program for 2021-2027, supported by the ERDF and CF.

- The programming phase was crucial for delineating the demarcation lines and involved constant consultations with the Ministry of European Funds.
- Building on the positive experience from 2014-2020, the programme will use the ITIs framework, establishing more functional areas within it.

PROGRAMMING CONTEXT

The programme is based on the Strategy of Lower Silesian Voivodeship 2030, which responds to the need to strengthen the competitive advantage of the existing regional manufacturing sector and exploit the R&D&I potential of scientific research centres in the Wrocław agglomeration. The programme intends to promote diversification in terms of economic development by increasing support for weaker areas in the region.

The **JTF** strand of the programme is crucial, as one of the most critical challenges in the Lower Silesian is the transition to a low-carbon economy. This will be achieved by increasing energy production from renewable energy sources, developing green and blue infrastructure, and supporting greener public transport. Another issue in the region is related to demographic challenges due to the low birth rate, ageing population, and high unemployment rate. Therefore, the programme aims to support what is called 'social transformation'.

The Managing Authority (MA) is the Board of the Lower Silesian Voivodship operated by the Marshal's Office of the Lower Silesian Voivodship in Wrocław. In 2020, the Lower Silesian Voivodeship Management Board created a Working Group to assist in developing the regional programme for 2021-2027, aligning it with national and European strategies and ensuring coordination with other programmes. Additionally, a Working Group for the Just Transition Fund was set up.

Demarcation and potential synergies are identified within the Partnership Agreement (PA). Where there is a risk of overlapping, defined demarcation lines are applied. Synergies in the programme mainly refer to activities co-financed by the ERDF, ESF+ and JTF. Identifying intervention synergies is an important factor both in the programming and implementation phases of the Lower Silesian programme.

Cooperation with other EU programmes, funds, and instruments is centrally coordinated by the Ministry of European Funds. This ministry, in consultation with other MAs, has established clear delineations of supported activities at both regional and central levels, as well as under the NRRP and other programmes. Moreover, the scope and implementation levels of interventions are defined by the PA.

Formal coordination mechanisms, such as the Convention of Marshals, facilitate information exchange among the MAs from different regions. This convention, created in 1999, is a forum to promote the effective implementation of development and social policy in the regions and includes presidents of the Polish regions. It helps reach a consensus on fund implementation issues and outlines synergy from various sources. The Convention of Marshals is an advisory and consultative group for the Association of Polish Regions. It evaluates legislative proposals, addresses ongoing issues in the governance of the regions and formulates unified positions, which are then communicated to the relevant authorities.

Difficulties in coordinating support mechanisms with other programmes and funds mainly concern the simultaneous launch of potential complementarities in different programmes and the need to avoid double funding. To address this problem, standard mechanisms such as demarcation lines and consultations with the Ministry were used during the

programming phase. Each programme was also reviewed by the Ministry of the Funds and negotiated with the European Commission.

The MAs of regional programmes must take account of the provisions of the demarcation line from the programme creation stage and may not plan support that is not provided for by the demarcation line.

Synergies with the **NRRP** and EU programmes were formulated according to a model defined centrally by the Ministry of Funds, focusing on supporting enterprise projects in the R&D&I sector. Moreover, synergies with the NRRP in thermal modernisation and rail infrastructure were implemented, clarifying the scope of support between the regional programme and the NRRP.

The programme has pursued complementarity with **Horizon Europe** (HE) in smart specialisation fields, scheduling calls for proposals for 2024 while opting not to utilise the Seal of Excellence (SoE) instrument for support at the national-level. Synergy with HE is mainly realised in the national programme - European Funds for Smart Economy 2021–2027, which is the continuation of two previous national programmes, Innovative Economy 2007-2013 and Smart Growth 2014-2020. The 21-27 Smart Economy programme is supported by the ERDF, and its main objectives are: increasing the potential for research and innovation and the use of advanced technologies; increasing the competitiveness of SMEs; developing skills for smart specialisations, industrial transformation and entrepreneurship; and transformation of the economy towards Industry 4.0 and green technologies.

These projects are funded through programmes with funds from the ERDF, ESF+ or JTF and should not duplicate interventions already supported by the NRRP.

The ERDF's actions to strengthen the role of culture and sustainable tourism will complement the ESF+ initiatives, especially those related to developing skills in the cultural sector and promoting cultural offerings and social innovations.

The programme also incorporates **Integrated Territorial Investments Strategies (ITIs)** as part of its implementation strategy. ITIs promote a collaborative partnership model between local government units in cities and surrounding functional areas.

SYNERGY



**Fundusze Europejskie
dla Dolnego Śląska**

The regional programme presents many synergies between the ERDF and ESF+. These occur as the ERDF mainly supports hard infrastructure while the ESF+ funds training programmes and support for personnel. This is evident in the health sector, where the ERDF supports health care infrastructure, while the ESF+ funds medical personnel and preventative care projects, e.g. interventions planned under Specific Objectives (SO) 4.5, 4.6, 5.1. Moreover, the programme plans complementary activities through the national European Funds for Infrastructure, Climate, Environment programme for 2021-2027, supported by the ERDF and CF in the area of energy efficiency and production of renewable energy – e.g. SO 2.1, 2.2,

The programme plans to deploy ITI in SO 5.1, *Fostering integrated and inclusive social, economic and environmental local development, culture, natural heritage, sustainable tourism and security in areas other than urban areas.*

ITI will support the execution of spatial strategies, thereby promoting the sustainable development of urban areas. The budget allocated to implementing ITI amounts to EUR 100.3 million from the ERDF and ESF+.

The 2021-2027 ITI created within the regional programme builds on the experiences of the 2014-2020 period. It was proposed following extensive social consultations with representatives of local governments and aligned with their goals.

In the 2014-2020 programming period, the programme for Dolny Śląsk envisaged the ITIs framework, which played a crucial role in distributing EU funds between functional areas. The framework served as a targeted instrument to address the intra-regional differences and disparities identified in previous periods. During the last programming period, it was implemented in the functional urban areas of Wrocław, Wałbrzych and Jelenia Góra. The ITIs facilitated a thorough diagnosis of the territorial needs and potential in various areas. This process involved extensive consultation with social partners to ensure that actions were aligned with the territorial development goals. This approach also reinforced the administrative capacity of the local authorities involved.

The PA for 2021-2027 highlighted the positive effects of ITI operations in the 2014-2020 period, which involved the three above-mentioned functional areas. Consequently, the ITI was proposed for the following functional areas: the Wrocław Functional Area, the Jelenia Góra Functional Area, the Wałbrzych Functional Area, the Legnica-Głogów Functional Area, the Western Functional Area, and the Southern Functional Area.

This will be supported by the regional programme funded by the ERDF and ESF+ in synergy with the European Funds for Infrastructure, Climate, and Environment Programme 2021-2027 to expand the goals and reach of the ITI.

Funds will be dedicated to the following types of interventions:

- renovation of public spaces, including the development of inter-block spaces, promenades, parks, markets and squares, measures for safety, construction/modernization of energy-saving street lighting;
- development of sustainable public transport connecting the city and its functional area;
- improving the condition of the natural environment in the functional area of the city, especially in terms of air quality;
- improving the condition of residents through the development of infrastructure for social activation and integration;
- supporting the development of vocational education and training in response to the needs and challenges of the labour market in the ITI area;
- protecting, developing and promoting natural and cultural heritage, including sustainable tourism. Support will be provided to tourist trails, e.g. those related to bicycle infrastructure, and the necessary elements accompanying such investments, such as toilets, bicycle racks, and elements ensuring safety.

ITI-supported projects will also contribute to achieving the objectives within PO2 – promoting a greener Europe, and PO4 – fostering a more social Europe. Under PO2, activities related to water and sewage management, biodiversity protection, urban mobility and energy efficiency for both public and residential buildings are planned. As for PO4, supported interventions will relate to preschool, vocational education and the support and development of social services.

The Jelenia Góra functional area is one of the functional areas using the ITI approach¹⁰³.

Figure 29. Territorial coverage of the Jelenia Góra functional area.



Source: *Integrated Territorial Investments strategy - Jelenia Góra Agglomeration for the years 2021-2029*

The coverage of this area has increased by eight new communes since the 2014-2020 programming period. Despite this expansion, it remains one of the less developed areas of the region. The main challenges include addressing the lack of transport infrastructure, transitioning to a low-carbon economy and improving access to schools and education.

Developing projects using an integrated approach allows various aspects of territorial development and their interactions to be considered, including the economy, environment, social issues, infrastructure investments, cultural heritage and tourism. Coordinating and agreeing on activities enables consideration of the diverse needs and interests of local residents. Collaboration between local government representatives and communities in crafting and executing territorial development strategies fosters the creation of spaces that cater to various social groups while respecting each area's unique characteristics. An integrated approach to planning and implementing also facilitates the optimal utilisation of available territorial resources, encompassing natural resources, infrastructure, spatial arrangements, and human potential, including social and cultural assets. Jointly undertaking strategically significant initiatives facilitates sustainable and harmonious territorial development, enhancing residents' quality of life and bolstering the area's allure and competitiveness.

An example can be found in education, which is concerned with expanding education opportunities within the functional area. The initiative includes:

- equipping students with basic and transversal vocational skills and supporting the potential of all students, particularly those from disadvantaged groups. This includes developing students' professional skills, in particular acquiring additional skills to increase their chances in the labour market, offering scholarship assistance programmes, and providing national and international internships for students;

¹⁰³ Integrated Territorial Investments strategy - Jelenia Góra functional area for the years 2021-2029.

- improving the work of schools and vocational training centres;
- improving the competences of teachers and other staff in the education system, developing teaching and management staff, primarily for the needs of vocational education;
- strengthening and promoting vocational education, including vocational education, in particular through cooperation with employers and the dissemination of work-based education. This includes ensuring the active participation of employers in the educational process, implementing a system of paid internships and training tailored to the needs of specific employers, and creating patronage classes in new fields of study;
- support for education and vocational education, taking the needs of students with disabilities into account;
- equipping schools and vocational education institutions to meet the needs of modern teaching;
- developing the competencies needed in the process of transformation towards a green economy;
- developing and improving the educational guidance and career counselling system;
- improving the quality and availability of educational infrastructure to meet the identified needs at the subregional level.

The project called *The Professional Academy* is spearheaded by the Lower Silesian Business Incubator Association from Świdnica with collaboration from two entities from the NGO sector, the City of Jelenia Góra, the City of Kowary, the Karkonosze County, the Lviv County, and the Złotoryja County. Leveraging ERDF and ESF+ funds, the initiative targets students and the staff of education infrastructures in the functional areas.

The project aims to address common social and economic challenges such as limited access to the labour market, education deficiencies, and enterprise competitiveness, as well as to ensure equal access to good quality, inclusive education and vocational training, particularly for disadvantaged groups.

Implementation of the project is expected to enhance the availability of public services in the field of high-quality vocational education, increase its attractiveness, and strengthen the professional competencies of school graduates and employees, thus bolstering the competitiveness of the functional area's economy. Support for vocational education will contribute to increasing the number of professional staff, which aligns with the intention to develop a sustainable economy.

GETTING IN TOUCH WITH THE EU

In person

All over the European Union there are hundreds of Europe Direct information centres. You can find the address of the centre nearest you at:

https://europa.eu/european-union/contact_en

On the phone or by email

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),
- at the following standard number: +32 22999696 or
- by email via: https://europa.eu/european-union/contact_en

FINDING INFORMATION ABOUT THE EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website at: https://europa.eu/european-union/index_en

EU publications

You can download or order free and priced EU publications at: <https://op.europa.eu/en/publications>. Multiple copies of free publications may be obtained by contacting Europe Direct or your local information centre (see https://europa.eu/european-union/contact_en).

EU law and related documents

For access to legal information from the EU, including all EU law since 1952 in all the official language versions, go to EUR-Lex at: <http://eur-lex.europa.eu>

Open data from the EU

The EU Open Data Portal (<http://data.europa.eu/euodp/en>) provides access to datasets from the EU. Data can be downloaded and reused for free, for both commercial and non-commercial purposes.

