

TOOLKIT ON STRUCTURAL FUNDS FOR SOCIAL NGOs

*Getting delivery
on the poverty target and partnership principle
in the new Programming Round (2014-2020)*

TABLE OF CONTENTS

INTRODUCTION.....	3
1. HOW TO PROCEED - KEY STEPS	5
A. How to influence the content of your OPs?.....	5
B. Monitor the draft OPs.....	5
C. Give feedback to EAPN Secretariat	5
Prepare your input	6
A. Influencing your Operational Programme(s).....	7
B. Monitor your Partnership Agreement and/ or Operational Programme(s).....	9
Checklist – Monitor your Partnership Agreement and OPs	10
2. GET INSPIRED – SHOWCASE OF EAPN SUCCESSFUL INVOLVEMENT	14
3. WHO TO CONTACT?.....	15
List of Managing Authorities.....	15
List of Desk Officers in the European Commission.....	15
4. GLOSSARY OF TERMS	18

INTRODUCTION

This toolkit is created to support National Networks to make use of the ESF in their fight against poverty.

Structural Funds for the programming period 2014-2020 amount to 352 € billion.

ESF will get at least 23.1% of the national Structural Funds' allocation. For the first time, the **ESF national budgets are secured, with the mandatory minimum of 23.1% of the total SF national allocation**. If you want to know the exact figures for your country, please click [here](#).

There are **3 major windows of opportunity** for you as a National Network in this new funding period to push your Managing Authorities to get involved and enrich the content of the Operational Programmes so that social inclusion/ Poverty reduction assume a more prominent place:

- ✓ **A higher profile given to social inclusion and poverty reduction** with especially the **20% ESF earmarked for social inclusion and poverty reduction**¹, a better mainstreaming of social inclusion and Community-led local approaches in the different Structural Funds.
- ✓ **A strengthened partnership approach**², including [the European Code of Conduct on Partnership](#)³ which sets out minimum requirements for Managing Authorities on how to involve in a meaningful manner relevant stakeholders, including NGOs, at all stages.
- ✓ An **extended scope of intervention for FEAD** (Fund for European Aid to the Most Deprived) **for social inclusion activities**⁴.

With a stronger focus on social inclusion and a better promotion of bottom-up and community-led approaches, the Structural Funds' Regulations 2014-2020 provide a more favorable legal framework for **more funding opportunities for social NGOs**. This is a key moment for National Networks to act.

This toolkit builds on EAPN's work to strengthen EAPN National Networks' capacity to be key interlocutors from the drafting phase of Partnership Agreements and Operational Programmes.

¹Art. 4.2. ESF

²Art. 5 CPR

³Commission Delegated Regulation, European Code of Conduct on Partnership in the framework of the European Structural & Investment Funds, 7.01.2014, C (2013) 9651 Final.

⁴ Member States will have the choice between 2 types of OP: OP I (if they want to use FEAD for food aid or material assistance) OP II (if they opt for social inclusion activities). OP II is more an ESF OP-type with a Monitoring Committee and a description of a strategy to contribute to deliver on the poverty reduction target and measures to prevent any overlap with ESF.

Major Milestones

- **Partnership Agreements (PAs)** were officially submitted to the European Commission on the 22nd of April.
- **Operational Programmes (OPs)** have started to be drafted by Managing Authorities both at national and regional level. Around the month of June, Member States should officially submit their OPs. The rule is that they should do that 3 months following the submission date of the PAs. All the OPs should be adopted by the Commission by end of January 2015 at the latest.
- **This timeframe allows National Networks to still have an influence on the drafting of the OPs.**

Aim of this toolkit

- ⇒ **To provide guidance for National Networks to influence Managing Authorities while drafting the Operational Programmes.**
- ⇒ **To ensure that the SF OPs will deliver on the poverty reduction target and will respect the partnership principle** (including ESF, ERDF, FEAD).
- ⇒ **To help National Networks to monitor the draft Partnership Agreements and Operational Programmes on the delivery on the poverty reduction target.**
- ⇒ **Evaluate the compliance with the partnership principle at all stages of the Structural Funds' process** (from the design to the evaluation of Structural Funds funded-programs).

This toolkit is designed to help you to influence the content and/ or report to Commission's ESF and ERDF Desk Officers⁵ some obstacles and failure of your Managing Authorities to implement EU provisions on social inclusion and partnership.

This toolkit was developed by the Structural Funds sub-group of the EAPN EU Inclusion Strategies Group. It was drafted and coordinated by Vincent Caron, EAPN Policy Officer with the support of Sian Jones, Policy Coordinator and Amana Ferro, Senior Policy Officer and produced by Nellie Epinat, EAPN Communications Officer.

⁵The ESF and ERDF Commission's Desk Officers are the ones who will review the OPs that will have been submitted by the Managing Authorities. They are in charge of making sure that the content and process are in compliance with the SF Regulations. They can ask the Managing Authorities to make changes/ adjustments in case of need.

1. HOW TO PROCEED - KEY STEPS

A. How to influence the content of your OPs?

- ✓ It is crucial to have a **direct contact**/ maintain your existing contact with your Managing Authorities (see key contacts below)
- ✓ **Find out the state of play** of your OPs by contacting your Managing Authorities (see the section Key Contacts)
- ✓ **Prepare an input to the OPs**: this could be framed around the 7 points listed in the 1st box below on “influencing your OP”. If you can get the draft OP, you can additionally use the checklist provided in the section “Monitoring your OPs”, if you want to draft a more targeted submission. (see section below)
- ✓ **Talk to other stakeholders** (other social, environmental NGOs or trade-unions...) about making a joint submission or statement.
- ✓ **Get publicity/ raise awareness** on your submission
- ✓ **Try to get a meeting with your Managing Authority to present your submission** and come to the meeting with clear requests (i.e. this could be about being member of the Monitoring Committee, which is central for NGOs because it will allow you to closely monitor the implementation of SF in your country).

B. Monitor the draft OPs

Monitor the draft OPs on the basis of the above checklist **and report to the ESF, FEAD and ERF Desk Officers** (see key contacts below) the obstacles you have been encountering in getting involved and the missing elements related to social inclusion/ poverty reduction in the respective SF. This is important because the Commission has the power to ask Managing Authorities to review their OP if it goes against the SF Regulations. Please do it before the OP is officially submitted to the Commission. The sooner you will do it, the better. Check the time schedule of the OP submission directly with your Managing Authority.

C. Give feedback to EAPN Secretariat

Give feedback to EAPN Secretariat on the outcomes of your actions (influencing your OPs and/ or monitoring your PA and OPs).

Prepare your input

Please find below useful information to prepare your inputs.

⇒ Key reference documents

- **Official Documents:**
- Structural Funds Regulations: [Common Provisions Regulation](#), [ESF](#), [ERDF](#), FEAD (soon available).
- [Commission's position paper](#) (for all EU Member States): guidance document sent to Managing Authorities, on the basis of which they had to build their OPs.
- [European Code of conduct of partnership](#) (only in EN).

⇒ EAPN Documents:

- [EAPN toolkit on Structural Funds for social NGOs.](#)
- [EAPN Mapping Document - Structural Funds 2014-2020: What room for social inclusion and the involvement of NGOs?](#)
- [EAPN briefing note on ex-ante conditionality on social inclusion.](#)
- [EAPN template letter on CLLD.](#)

A. Influencing your Operational Programme(s)

If your OP(s) are not finalized yet, you could prepare an input, drawing on the reference material from the EU and EAPN documents. In that regard, please find below a toolbox to help you to prepare your own contribution to influence the drafting of your ESF and ERDF OPs.

HOW TO PROMOTE SOCIAL INCLUSION & THE PARTNERSHIP PRINCIPLE IN A SNAPSHOT

- 1) **Social Inclusion and Poverty Reduction⁶ are included both as core integrated priority in the ESF and ERDF OPs and as cross-cutting issue in all Structural Funds.**
 - For ESF: this must be done first and foremost by a clear financial translation of the 20% of the ESF earmarked on poverty reduction⁷. This requires an integrated range of measures aiming at providing holistic, personalized pathways to inclusion, quality work and participation. This would be done most efficiently through integrated active inclusion approaches but other investment priorities should be reflected
 - Poverty Reduction/ Social Inclusion should also be mainstreamed in the other thematic priorities of all Structural Funds (i.e. for ESF: quality work, inclusive education; for ERDF: targeted use for energy efficiency improvements in poor households' housing...)
 - Making sure that FEAD ensures a smooth transition toward more sustainable and integrated ESF-funded activities. FEAD should be seen as a first step for the most deprived on their road to social re-integration (social services centers for those who are the furthest from the labour market to get information on the kind of social benefits they are entitled to – support in dealing with the administration to claim their social rights/ counseling/ group activities to help people to re-engage with other people and to get more self-confidence and participate in social activities....)
- 2) **Against the creaming phenomenon – reaching all disadvantaged groups** (long-term unemployed, people with disabilities, migrants, ethnic minorities, marginalized communities (including Roma), lone parents, homeless people and other groups facing or at risk of facing poverty and social exclusion).
- 3) **Push your Managing Authority to include Community-led local development⁸ in the ESF, ERDF OPs** with local development strategies and Local Action Groups (LAGs) underpinning the national anti-poverty strategies focusing on integrated multidimensional schemes and putting local NGOs and people with direct experience of poverty at the center of the planning, decision-making and implementation phases (*for more tips, please read the fuller EAPN proposals provided in the [EAPN template letter on CLLD](#)*)

⁶In the ESF Regulation, promoting social inclusion, combating poverty and any discrimination is one of the thematic priorities, art. 3. 1. b.

⁷Art. 4.2. of the ESF Regulation.

⁸ Chapter II on CLLD of the CPR

- 4) **Make use of the ex-ante conditionality on poverty reduction⁹ to press your Managing Authority to check the pre-existence of an integrated anti-poverty strategy** – and make sure that this strategy will be financially backed by Structural Funds in a coordinated and integrated manner. *(For more tips, please read the [EAPN briefing on the ex-ante conditionality on poverty reduction](#)).*
- 5) **Ask your Managing Authority to make use of social inclusion indicators.** These indicators should capture the approach in terms of “progression towards employment and social inclusion” of those who are the furthest from the labour market. This should be a combination of quantitative and qualitative measurements based on the recipients’ assessment so as to ensure long-term effects of SF-funded projects.
- 6) **Make use of the new provisions on partnership¹⁰ asking to be involved as key partner at all stages of Structural Funds OPs** (from design to evaluation).
 - At strategic/ programme level: you should be asking to be a member of the relevant Monitoring Committees (especially ESF and FEAD for OP II), so as to make sure that the poverty reduction target will be effectively delivered by SF-funded projects.
 - At project level: Financial means like technical assistance¹¹, global grants¹² and capacity-building¹³ still exists, but it is up to Managing Authorities to make it available for NGOs. It is crucial that you press them to do so to ensure easier access to funding for social NGOs.
- 7) **Push for inclusive transnational cooperation¹⁴:** How? By asking to get involved in the selection of themes; by promoting integrated social inclusion responses (i.e. Active Inclusion...) to highlight the importance of supporting grass-root initiatives targeting people experiencing poverty and social exclusion; by requesting an NGO-friendly delivery system ensuring an easier access to transnational projects for social NGOs.

For more in-depth information, please read the [EAPN 2012 Structural Funds’ Toolkit](#), and especially the annex fiche (from p. 33 – 37).

⁹Art. 17 and annex 5 of the CPR (CPR) state what are ex ante conditionalities and how this should be integrated in Structural Funds.

¹⁰Namely the CPR (art. 5) and the ESF Regulation (art. 6) as well as the European Code of Conduct on Partnership.

¹¹ Art. 119 CPR.

¹² Art. 6.1. ESF.

¹³ Art. 6.3 ESF.

¹⁴ Art. 10 ESF.

B. Monitor your Partnership Agreement and/ or Operational Programme(s)

In case you managed to get a draft of the Operational Programmes:

- Monitor/ assess to what extent social inclusion/ poverty reduction as well as the partnership principle have been integrated into your OPs. If the OPs have still not been officially submitted to the European Commission by your Managing Authorities, you can use the above box as well as the checklist to press your Managing Authorities to improve the OPs accordingly.
- In parallel and/ or if the OP has already been officially submitted to the European Commission, you can contact the Commission's Desk Officers (ESF, ERDF, FEAD) (see the contact list below) and tell them about the missing elements, gaps on social inclusion/ poverty reduction as well as obstacles you have encountered while trying to get involved in the design of the OP.

Here is an indicative checklist of questions that could frame your work.

Checklist – Monitor your Partnership Agreement and OPs

I) How to deliver on the poverty reduction target

	YES / NO	Comments
a) More globally, is the poverty reduction target picked up in your PA and/ or OPs (ESF and ERDF)?		
b) How is the poverty reduction target mainstreamed in the different Structural Funds?		(Well – average – badly – inexistent) Explain
c) Is the poverty issue picked up in the employment/ education parts of the ESF OP; in the investments on energy efficiency in the ERDF OPs?		
d) Has a specific Programme being proposed? Or a thematic focus in the national ESF OP?		
e) What is the focus given by Managing Authorities on social inclusion? <ul style="list-style-type: none"> In the ESF OP, does your Managing Authority promote integrated social inclusion approaches? Is it through Active Inclusion? What are the other measures covered? (anti-discrimination / integration of marginalized communities/ social economy/ social services..) 		

<ul style="list-style-type: none"> • In the ERDF OPs, is there any support provided for social infrastructures? If yes, what kind? (childcare, housing....) • If not, what elements are missing to ensure genuine long-term pathways to social inclusion/ quality and sustainable employment? • Do you think that the measures in place will sufficiently target the hardest-to-reach? What groups? • What will be the monitoring mechanisms in place? • Did your Managing Authorities promote the use of social inclusion proofing/ social inclusion indicators to ensure long-term effect? 		
<p>f) Ex-ante conditionality on social inclusion/ poverty reduction: Did your Managing Authority fully integrate this ex-ante conditionality requiring the establishment of an anti-poverty strategy as a pre-requisite?<i>(please see the briefing note on the ex-ante conditionality for more information)</i></p>		
<p>g) Template letter on Community-led local Development: Did your Managing Authority include in the OPs the possibility to fund Community-led local development approaches in general? On Social Inclusion in particular? <i>(please see the template letter including EAPN proposals)</i></p>		
<p>h) On FEAD, did your country choose to focus on material assistance, food aid or social inclusion activities? To which specific groups (homeless and children in poor families)? What type of social inclusion activities would be the most useful to</p>		

<p>ensure a smooth transition to ESF-type of activities? (social services centers for those who are the furthest from the labour market to get information on the kind of social benefits they are entitled to – support in handling with administration to claim their social rights/ counseling/ group activities to help people to re-engage with other people and to get more self-confidence and participate in social activities....)</p>		
<p>2) Is the partnership principle being respected?</p>		
<p>a) Have you been involved in the drafting phase of the Partnership Agreement in your country as you should have been?</p>		
<p>b) Have you been involved in the drafting phase of the Operational Programmes (ESF, FEAD) by your Managing Authority(ies) as you should have been?</p>		
<p>c) If Yes, did your Managing Authorities respect the main requirements of the European Code of Conduct on Partnership?</p> <ul style="list-style-type: none"> • Ensure transparency in the selection of partners representing regional, local and other public authorities, social and economic partners and bodies representing the civil society, to be appointed as full members in the monitoring committees of the programmes. • Provide partners with adequate information and sufficient time as a prerequisite for a proper consultation process 		

<ul style="list-style-type: none"> • Ensure that partners must be effectively involved in all phases of the process, i.e. from the preparation and throughout the implementation, including monitoring and evaluation, of all programmes • Support the capacity building of the partners for improving their competences and skills in view of their active involvement in the process and • Create platforms for mutual learning and exchange of good practice and innovative approaches. 		
<p>d) Did your Managing Authorities make Technical Assistance/ Global Grants/ Capacity-building available to NGOs as foreseen (this is not obligatory, only facultative)?</p>		

2. GET INSPIRED – SHOWCASE OF EAPN SUCCESSFUL INVOLVEMENT

Official consultation processes have been organized on the drafting of Partnership Agreements and OPs involving social NGOs in several countries. At least 8 EAPN National Networks (AT, CZ, DE, FR, IE, IT, PL, ES) have been involved in one way or another to try to influence the shaping of the partnership agreements. At least 3 EAPN National Networks have even been invited to be part of monitoring committees (DE, IE, ES). Even if it still represents a minority of cases, there is nonetheless a slight improvement which is mainly due to the new provisions on partnership and on social inclusion/ poverty reduction contained in the SF Regulations.

Please see below in the box, 4 good practices of EAPN National Networks who have successfully engaged in the shaping of the programming documents 2014-2020. This can give you some inspiration as to what you could do on the content and procedural side.

4 good practices from EAPN National Networks

- ✓ NGOs will run an ESF-funded programme: German Welfare Organizations (AWO/BAGFW), on a partnership programme for the social economy sector. In Spain, the NGO-driven anti-discrimination OP will certainly continue.
- ✓ NGOs pushing to get a specific OP on social inclusion: in Italy, the draft PA provides for the establishment of a National OP on “Social Inclusion – Poverty and network” with schemes to combat poverty through active inclusion.
- ✓ NGOs managing to get full implementation of the ex-ante conditionality on poverty reduction with the ESF backing financially the Polish anti-poverty strategy (accompanied by NGOs guidelines for regions in the field of social inclusion and poverty reduction).
- ✓ NGOs empowering their own members and the public administration on how to make OPs more “social inclusion and NGOs friendly”: EAPN ES successfully organized training sessions at regional level as well as roundtables with high-level representatives from Managing Authorities at regional level.

For more information, please read the [EAPN Mapping document](#). Other good practices are developed in this publication.

3. WHO TO CONTACT?

List of Managing Authorities

⇒ If you want to contact your ESF Managing Authority, please click [here](#).

⇒ If you want to contact your ERDF Managing Authority, please click [here](#).

List of Desk Officers in the European Commission

1) List of ESF Desk Officers

	Employment desk	Social Inclusion/Protection desk
AT	Katharina.muhr@ec.europa.eu	Barbara.roubicek@ec.europa.eu
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4. GLOSSARY OF TERMS

Capacity building	Mechanism which aims at reinforcing the general organizational skills of beneficiaries (including NGOs) through a wide range of aspects (resources, networking, planning...). In the ESF draft Regulation, this would be limited only to less developed regions.
CIP	Community Initiative Programme, a Europe-wide funding programme found in earlier Structural Funds (like EQUAL, focused on supporting innovative, transnational projects aimed at tackling discrimination and disadvantage in the labour market).
Cohesion Fund	A fund for transport and environmental projects (including infrastructure) in poorer Member States.
Common Strategic Framework (CSF)	Strategic document helping Member States in setting their investments priorities for all Structural Funds, the European Agricultural Fund for Rural Development, and the European Maritime and Fisheries Fund. This document will help Member States preparing their partnership contracts with key actions for each thematic objective and Fund, ensuring a better combining of various Funds.
Community-led development approach	A specific tool for use at the local level, led by local action groups (made up of representatives of local public and private socio-economic partners including NGOs, local authorities, neighbourhood associations, groups of citizens...), which encourages them to develop integrated bottom-up approaches, focusing on building community capacity and stimulating innovation (including social innovation), while promoting community ownership by increasing participation within local development.
CSGs	Community Strategic Guidelines, principles issued for Structural Funds.
Country-Specific Recommendations (CSRs)	On the basis of the macro-economic, employment, social policy measures outlined in the NRPs aiming at achieving all the headline targets of Europe 2020, the European Commission addresses recommendations that are tailored to the particular issues facing by each Member States about the most urgent measures to be adopted.
Earmarking	Obligatory allocation of a minimum proportion of Structural Funds in each country to support the delivery on the Europe 2020 Strategy and its 5 headline targets (including the poverty reduction one).
ERDF	European Regional Development Fund
ESF	European Social Fund
European Code of Conduct on partnership	EU document that should guide Member States when organizing the participation of all the relevant partners in the different stages of the implementation of the Structural Funds, by laying down minimum requirements for National Authorities to ensure a high quality involvement of partners, including NGOs.
EPAP	The European Platform Against Poverty is the new policy framework established by the Commission as part of Europe 2020 (one of the 7 Flagship Initiatives), to support the delivery on the poverty reduction target, based

on 5 areas of action: mainstreaming across all policy areas, use of EU funds, evidence-based social innovation, working in partnership and harnessing social economy, and better policy coordination between Member States.

Ex-ante conditionalities	Conditions that must be in place before Funds are disbursed (linked to thematic objectives, regulation...).
Ex-Post conditionalities	Conditions that will make the release of additional Funds contingent on performance.
Horizontal principle	Particular value or discipline applied across all the Structural Funds (e.g. gender, environment, social inclusion).
Europe 2020 Strategy	The strategy agreed by the European Council in 2010 to deliver smart, sustainable and inclusive growth, with 5 headline targets: innovation/R&D, climate change/energy, poverty reduction (lifting at least 20 million people out of poverty and social exclusion), employment (raise the employment rate up to 75%) and education (reduce the early-school-drop-out rate below 10% and foster tertiary education). The three latter are commonly referred to as the “social targets” of Europe 2020.
Global Grants	A mechanism through which the Member State or the Managing Authority may entrust the management and implementation of a part of an Operational Programme to one or more intermediate bodies (including NGOs), and may provide small grants to NGOs with 100% financing.
Macro-economic conditionalities	Conditions that are prior to the disbursement of Funds. For Member States facing excessive budget deficit and, thus, not complying with the Growth and Stability Pact rules, Structural Funds could be suspended by the European Commission.
Multiannual Financial Framework (MFF)	It is an inter-institutional agreement (European Commission, European Parliament and Council), which sets out the spending priorities of the EU budget for a 7-year period. It gives the maximum amounts (ceilings) for each broad category of expenditures (headings). The current negotiations about the next programming period 2014-2020 are currently underway.
n+2	The principle whereby Structural Funds must be spent within two years of the period for which they are allocated
NRPs	National Reform Programmes are prepared by Member States in April of each year to deliver on the objectives of Europe 2020, based on Integrated Guidelines and the priorities of the yearly Annual Growth Survey, and Spring Council Conclusions.
NSRF	National Strategic Reference Framework – Reference document for the programming of Structural Funds at national level.
NSRs	National Social Reports are the successors of the National Action Plans for Social Inclusion and the National Strategic Reports on Social Protection and Social Inclusion, based on the agreed Common Objectives of the Social Open Method of Coordination. The NSRs are aimed at underpinning the social dimension of the National Reform Programmes.
OP	Operational Programme

Partnership	The concept that Structural Funds should be planned and managed by a combination of government, different levels of authorities, social partners, NGOs and civil society.
Partnership Contracts	Also referred to as Partnership Agreements, they are global agreements between a Member State and the European Commission on the use of Structural Funds. This is a new strategic document, drafted by Member States in cooperation with partners, detailing the indicative amount of SF money by thematic objective at national level, for each of the SF, to deliver on each of the Europe 2020 headline targets.
Performance Reserve	A total of 5% of the national allocation of each Fund will be set aside and allocated at mid-term review to the Member States for the programmes that will have fully succeeded in meeting the Europe 2020 targets.
Priority axis	An operational programme shall consist of several priority axes. A priority axis shall concern one Fund for a category or region, shall correspond to a thematic objective, and comprise one or more investment priorities of that thematic objective, in accordance with the Fund's specific rules.
Technical Assistance	Mechanism which aims at supporting the smooth running and management of Structural Funds operation, for instance by covering studies concerning the operation of the Funds, the exchange of information and experience, reaching out to final beneficiaries, as well as support to organizations in preparing funding applications and implementation if given to NGOs.
Thematic objectives	Each Structural Fund shall support the thematic objectives so as to contribute to the Europe 2020 Strategy for smart, sustainable and inclusive growth. Thematic objectives shall be translated into investment priorities for each Structural Fund. For 2014-2020, the European Commission proposed 11 thematic objectives, out of which 4 defined the scope for the ESF, and all 11 for the ERDF.
Transition regions	A new category of EU Regions, whose GDP is between 75% and 90% of the EU27 average. The 2 others are the developed regions (above 90%) and the less developed ones (below 75%).

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EUROPEAN ANTI POVERTY NETWORK

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For more information:

<http://ec.europa.eu/social/main.jsp?catId=327&langId=en>

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