Session IV: the key strategic lines and programs of the European Union in the Mediterranean region for 2014-2020

Albert Sorrosal
1. **Strategy, policies & projects**
   1.1. Strategic approach and programme cycle management
   1.2. Why developing multi-partner projects

2. **EU policies and financial instruments 2014-2020**
   2.1. EU policies and budget 2014-2020
   2.2. Financial instruments available in the Mediterranean

3. **Conclusions**
1. Strategies, policies and projects

**Programmed**: integrated into a coherent frame at EU, national & regional levels

**Identified**: as regards to the beneficiaries needs

**Formulated**: defined in a viable way

**Implemented**: executed activities to achieve the results

**Evaluated**: to justify the actions & to achieve lessons learned
1. Strategies, policies and projects

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1. Strategies, policies and projects

What kind of proposals can be submitted for EU grants?

- Local strategies and policies
- Potential area of European financing
- EU funding opportunities
1. Strategies, policies and projects

What is a grant? (Council’s financial regulation 966/2012)

Article 121. Scope of grants

1. Grants are direct financial contributions, by way of donation, from the budget in order to finance any of the following:

   a) an action intended to help achieve a Union policy objective;

   b) the functioning of a body which pursues an aim of general Union interest or has an objective forming part of, and supporting, a Union policy (‘operating grants’).
A project is an independent action/operation with:

• A series of coherent activities
• Well defined operational objectives and target groups
• Planned and tangible results
• Limited duration
• And above anything else…PEOPLE
1. Strategies, policies and projects

Why develop a multi-partner project?

Projects proposals need to provide answers to:

• How to solve a problem or overcome a common constraint

• How to meet a need or take advantage of a common opportunity

• Which might be common solutions applied though pilot projects, development of new systems, studies and exchange of experiences

• How is the project contributing to the programme/instrument priorities and the related EU policy
2. EU policies and financial instruments 2014-2020

What is Strategy 2020?

Five objectives:
- employment, research and innovation
- climate change and energy
- education
- fighting poverty

Smart Growth
- developing an economy based on knowledge and innovation

Sustainable Growth
- promoting a more resource efficient, greener and more competitive economy

Inclusive Growth
- fostering a high-employment economy delivering social and territorial cohesion

INNOVATION
- Flagship initiative «Innovation Union»

EDUCATION
- Flagship initiative «Youth on the move»

DIGITAL SOCIETY
- Flagship initiative «A digital agenda for Europe»

CLIMATE, ENERGY, MOBILITY
- Flagship initiative «Resource efficient Europe»

COMPETITIVENESS
- Flagship initiative «An industrial policy for the globalisation era»

EMPLOYMENT AND SKILLS
- Flagship initiative «An agenda for new skills and jobs»

FIGHTING POVERTY
- Flagship initiative «European platform against poverty»

http://ec.europa.eu/europe2020/index_en.htm
2. EU policies and financial instruments 2014-2020

- Smart and inclusive growth: 47%
- Economic, social and territorial cohesion: 33.9%
- Competitiveness for growth and jobs: 13.1%
- Compensations: 0.0%
- Administration: 6.4%
- Global Europe: 6.1%
- Security and citizenship: 1.6%
- Sustainable growth: natural resources: 38.9%
2. EU policies and financial instruments 2014-2020

2014-2020: approx. 960 billion € to be spent in programmes and projects

- 80% managed by national and regional authorities (shared)
- 18% centrally managed (RTD...)
- 2% others (1/3 countries, UN...
2. EU policies and financial instruments 2014-2020

Main EU instruments/funds available for the Mediterranean

- European Neighbourhood Instrument (ENI): 15 Billion €
- Instrument for Pre-Accession (IPA): 11 Billion €
- Other
2. EU policies and financial instruments 2014-2020

- **DG Development and Cooperation**
  - Until October 2014

- **DG Enlargement**
  - From November 2014

- **DG Humanitarian Aid and Crisis Management**
  - From November 2014

- **DG Neighbourhood and Enlargement Negotiations**
  - From November 2014
"Ambition and commitment to reforms will guide the massive EU funding for our neighbours for the coming years. Priorities for support have been established through close dialogue with our partners, involving all the relevant stakeholders, in the spirit of ownership and partnership. The funding will help them address key challenges their societies are facing".
2. EU policies and financial instruments 2014-2020

- ENI
  - Bilateral programmes
  - Regional and ENI-wide programmes
    - ENI East
    - ENI-wide
    - Cross-Border programmes
    - ENI South
2. EU policies and financial instruments 2014-2020

Bilateral programmes

Bilateral programmes are jointly between EU and each country decided through the Action Plans, which set out an agenda of political and economic reforms with short and medium-term priorities of 3 to 5 years.

ENP Action plans reflect each partner’s needs and capacities.

The funds are channelled in two ways:

• Grants managed by EU Delegations in each country

• Loans from European Investment Bank (EIB) or European Bank for Reconstruction and Development (EBRD)
2. EU policies and financial instruments 2014-2020

**Lebanon:** the indicative allocation for the period 2014-2016 is between €130,000,000 – €159,000,000. The three priority sectors of intervention to be financed through this envelope are the following:
- Justice and security system reform (indicative 15%)
- Reinforcing social cohesion, promoting sustainable economic development and protecting vulnerable groups (indicative 40%)
- Promotion of sustainable and transparent management of energy and natural resources (indicative 20%)

**Tunisia:** the indicative allocation for the period 2014-2015 is between €202,000,000 - €246,000,000. The three priority sectors of intervention to be financed through this envelope are the following:
- Socio-Economic reforms for inclusive growth, competitiveness and integration (indicative 40%)
- Strengthening fundamental elements of democracy (indicative 15%)
- Sustainable regional and local development (indicative 30%)

**Morocco:** the indicative allocation for the period 2014-2017 is between €728,000,000 – €890,000,000. The three priority sectors of intervention to be financed through this envelope are the following:
- Equitable access to basic social services (indicative 30%)
- Support to democratic governance, the Rule of Law and mobility (indicative 25%)
- Jobs, sustainable and inclusive growth (indicative 25%)

Further support to the Action Plan and Civil Society (indicative 20%)
2. EU policies and financial instruments 2014-2020

Regional and ENI-wide programmes

They are managed by EC in Brussels.

**Regional South:** the indicative allocation for the period 2014-2017 is between €371,000,000-€453,000,000. The four priority sectors of intervention to be financed through this envelope are the following:

- Building a partnership for liberty, democracy and security (indicative 20%)
- Building a partnership for inclusive and sustainable economic development (indicative 20%)
- Building a partnership between the people (indicative 25%)
- Support regional and sub-regional institutional cooperation (indicative 15%)

**European Neighbourhood-wide programme:** the indicative allocation for the period 2014-2017 is between €1,675,000,000 to €1,876,000,000 of which €770,000,000 for specific support ("Umbrella programmes") for countries progressing further towards deep and sustainable democracy and implementing agreed reforms contributing to that goal. The other three priority sectors of intervention to be financed through this envelope are the following:

- Building a partnership for inclusive and sustainable economic development and integration (indicative 55%), notably support to the Neighbourhood Investment Facility.
- Building a partnership between people: Erasmus+ in the Neighbourhood and Russia (indicative 40%)
- Building capacity for European Neighbourhood countries (indicative 5%)

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2. EU policies and financial instruments 2014-2020

17 Cross-border cooperation programmes 2014-2020

*Three overarching objectives:*

1. Economic and social development
2. Common challenges in environment, public health, safety and security
3. Promotion of better conditions and modalities for ensuring the mobility of persons, goods and capital

*Main principles:*

- Single management mechanism
- Single set of procedures
- Multiannual programming
- Partnership
- Complementarity
2. EU policies and financial instruments 2014-2020

3 cross-border cooperation programmes in the Mediterranean

*Mediterranean Sea Basin (ENI MED)*

Portugal, Spain, France, Italy, Malta, Greece, Cyprus, Lebanon, Israel, Palestine, Jordan, Egypt, Tunisia and Algeria (to be confirmed). Other countries, such as Turkey and Morocco may join later.

*Italy-Tunisia*

Sicily and North of Tunisia

*Mid-Atlantic*

Spain, Portugal & Morocco
2. EU policies and financial instruments 2014-2020

Overview - Instrument for Pre-accession Assistance

The Instrument for Pre-accession Assistance (IPA) is the means by which the EU supports reforms in the 'enlargement countries' with financial and technical help. The IPA funds build up the capacities of the countries throughout the accession process, resulting in progressive, positive developments in the region. For the period 2007-2013 IPA had a budget of some € 11.5 billion; its successor, IPA II, will build on the results already achieved by dedicating € 11.7 billion for the period 2014-2020.

Current beneficiaries are: Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Iceland, Kosovo*, Montenegro, Serbia, and Turkey.

Purpose

EU pre-accession funds are a sound investment into the future of both the enlargement countries and the EU itself. They help the beneficiaries make political and economic reforms, preparing them for the rights and obligations that come with EU membership. Those reforms should provide their citizens with better opportunities and allow for development of standards equal to the ones we enjoy as citizens of the EU. The pre-accession funds also help the EU reach its own objectives regarding a sustainable economic recovery, energy supply, transport, the environment and climate change, etc.
### Key figures

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<td>Albania</td>
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<td>Bosnia &amp; Herzegovina</td>
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<td>Croatia</td>
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<td>The former Yugoslav Republic of Macedonia</td>
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<td>Iceland</td>
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<td>Kosovo*</td>
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<td>Montenegro</td>
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<td>Turkey</td>
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<td>Multi-Beneficiary Programme</td>
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### IPA-CBC ADRIATIC

**Country strategies**
2. EU policies and financial instruments 2014-2020

Other EU instruments/funds available for the Mediterranean

- LIFE+
- HORIZON 2020
- COSME
- DCI
- ETC
3. Conclusions

**Keys to success:**

- Ensure adequate strategies at local level with strong political and stakeholders’ commitments
- Provide good capacity building to the technical staff and sufficient resources
- Identify project ideas that are consistent with the needs of your cities and the priorities of EU
- Assess the relevance and likely feasibility of proposals
- Identify potential sources of funding for the proposals
- Invest time and money in formulating the proposals