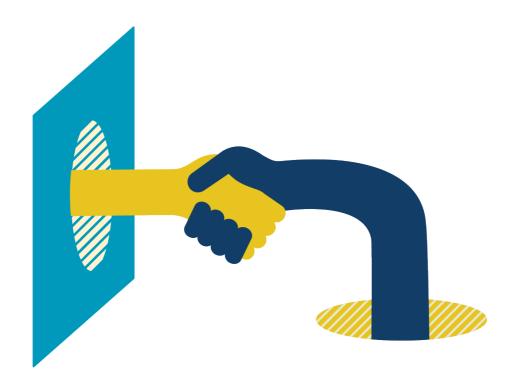


Social innovation made by Interreg

February 2023

A study focusing on the EU cooperation programme's contribution to social innovation in the period of 2014-2020, the outlook beyond 2020, and links with regional innovation strategies (S3)



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Publisher Interact Programme
Date 29.11.2022
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Based on the study conducted by ECORYS



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1. Introduction

The funding period 2021-2027 starts in a period when Europe is facing a challenging period. At the same time, the coming years will see a shift towards a green and digital future. This twin transition presents individuals, businesses, and regions with exciting opportunities, as well as a responsibility to deliver fair and inclusive solutions. Interreg has a lot to offer to build stronger territorial resilience and better response to future shocks, among others through the advancement of various social innovation measures.

Social innovation is a complex concept that has several definitions. However, based on EU guidelines ¹, social innovation is:

"social both as to its ends and its means and in particular an activity which relates to the development and implementation of new ideas concerning products, services, practices, and models, that simultaneously meets social needs and creates new social relationships or collaborations between public, civil society or private organisations, thereby benefiting society and boosting its capacity to act".

The European cooperation programmes (widely referred to as Interreg) have a special place in driving forward social innovation solutions, first by being close to territorial needs, allowing joint work and learning across borders, but also because it focuses on experimentation, piloting and developing new solutions. Solutions that can be further implemented on a national or regional scale or even inspiring larger initiatives.

This publication presents the main findings about the EU cooperation programme contribution to social innovation in the funding period of 2014-2020, the main lessons learnt for better implementation beyond 2020 and potential synergies with other funds. It also looks at potential links with regional innovation strategies which serve as inspiration for further studies.

The conclusions are based on the study commissioned by Interact and performed by ECORYS in the period of June-November 2022. The study included 176 projects financed by the EU cooperation programmes (2014-2020). In addition, the ECORYS team reached out to several programmes.

We thank you all who contributed to the study and its conclusions. The content of this document was approved by the Interact IV Monitoring Committee at the first meeting (MC01) held on 20 September 2022. The style of the document was updated in January 2023 to reflect the new Interact IV brand.

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2. Analysing the impact and role of Interreg funding regarding social innovation during 2014-2020

Interreg programme experience during 2014-2020 showed that focusing on innovation infrastructure alone is not sufficient to enable change in the region. To have a lasting effect, changes in the organizational mindsets and capacities to find new ways how to design and deliver processes, products, and services, as well as build social innovation networks are required. Interreg programmes supported work on changes in a wider innovation ecosystem by looking at regulatory aspects, the way services or processes are organised or delivered and providing ideas for solutions and improvements and supporting non-technological innovation solutions.

At the same time programmes have also learnt from the projects. The bottom-up approaches from the funded projects in this period have inspired the Managing Authority, also feeding into the 2021-2027 period intervention logic. The social innovation approach helps to better understand the needs of end users (final recipients) in the region.

The section here reflects on the main findings and conclusions from the analysis determining what the contribution of Interreg has been during the 2014-2020 implementation period within the field of social innovation. The analysis identified the main achievements, strengths, weaknesses, and implementation challenges.

The information included in the analysis comes from diverse sources of information to ensure an exhaustive analysis. The main sources of information from which this document draws form are:

- Desk research: including relevant evaluations and reports from EU projects, initiatives, and programmes in the field of social innovation.
- Mapping exercise: social innovation projects financed by Interreg during 2014-2020 based on the data available in the keep.eu database. This mapping was further complemented with projects identified through the interviews with the Interreg programme Managing Authorities (MA). The final mapping includes 176 projects.
- Interviews: with the MA and lead partners from Interreg projects focused on the topic of social innovation. These interviews have been the main source of information, as it has provided useful qualitative data to complement the information collected through desk research.

The projects included in the study were further grouped in clusters, with a detailed description of the key figures and facts of the funded projects. Finally, the chapter also includes several examples and practices that illustrate what EU Cooperation programmes have done in the field of 'social innovation' during the programming period 2014-2020.

2.1. Characterisation of social innovation projects

During the 2014-2020 implementation period, Interreg has financed around 176 projects targeting social innovation, which indicates over 340 million euros of total funds devoted to funding projects contributing to social innovation. Among this group, we can highlight Interreg Central Europe programme (14% of the projects funded contribute to social innovation, which includes 25 projects), Interreg Danube Transnational programme (13%) and Interreg Europe programme (12%) as illustrated in Figure 1.

In terms of themes covered by Interreg social innovation projects during the 2014-2020 period, Figure 2 shows that projects tend to focus on SME and entrepreneurship and on social inclusion and equal opportunities, followed by health and social services. The themes that are covered to a lesser extent involve environmental topics such as energy efficiency and natural risks management, as well as transport and infrastructure fields.

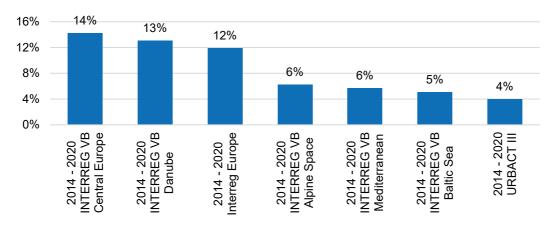


Figure 1: Distribution of social innovation projects across Interreg programmes

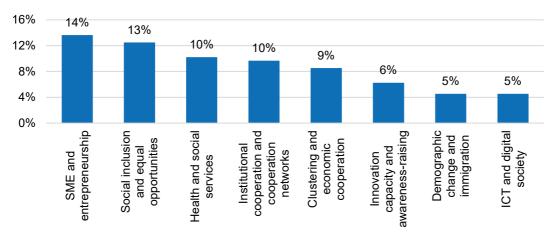


Figure 2: Overview of the main themes covered by Interreg social innovation projects

Regarding the 2014-2020 ERDF thematic objectives, Figure 3 highlights that Thematic Objective (TO) 1² is, by far, the most frequent TO under which social innovation projects are implemented. 64% of the projects included in the mapping are contributing to this TO. It is followed by TO 11³ covered to by 10% of social innovation projects. On the contrary, the TO with the lowest number of social innovation projects are TO 5,7,8 and 10, which are related to climate change, transport, the labour market, and education.

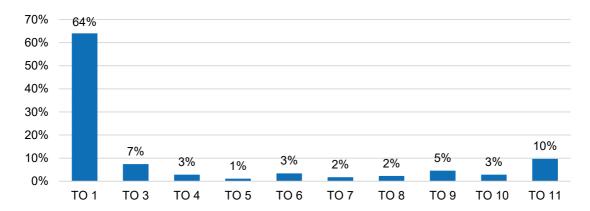


Figure 3: Overview of the main Thematic Objectives (TO) covered by Interreg social innovation projects4

The average total budget of the social innovation project co-financed by Interreg programmes is approximately two million euros (see Figure 4 below). The analysis conducted has provided useful insights to define a social innovation "project prototype". As a result, Figure 5 illustrates the main characteristics of the representative social innovation project funded by Interreg programmes during the 2014-2020 programming period.

² Strengthening research, technological development, and innovation

³ Enhancing institutional capacity of public authorities and stakeholders and efficient public administration through actions to strengthen the institutional capacity and the efficiency of public administrations and public services related to the implementation of the ERDF, and in support of actions under the ESF to strengthen the institutional capacity and the efficiency of public administration

TO 1. Strengthening research, technological development, and innovation

TO 2. Enhancing access to, and use and quality of information and communication technologies (ICT)

TO 3. Enhancing the competitiveness of small and medium-sized enterprises (SMEs)

TO 4. Supporting the shift towards a low-carbon economy in all sectors

TO 5. Promoting climate change adaptation, risk prevention, and management

TO 6. Preserving and protecting the environment and promoting resource efficiency

TO 7. Promoting sustainable transport and removing bottlenecks in key network infrastructures

TO 8. Promoting sustainable and quality employment and supporting labour mobility

TO 9. Promoting social inclusion, combating poverty and any discrimination

TO 10. Investing in education, training, and vocational training for skills and lifelong learning

TO 11. Enhancing the institutional capacity of public authorities and stakeholders and efficient public administration

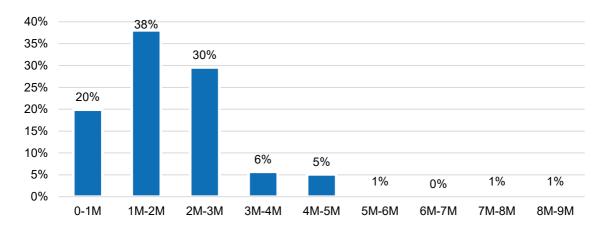


Figure 4: Budget distribution of projects



Figure 1: Project prototype

2.2. Main contribution of Interreg projects

The social innovation projects co-funded by Interreg programmes during the 2014-2020 implementation period have made relevant contributions across the borders, in and outside the European Union (EU). However, the geographical distribution of social innovation projects varies across Europe. As illustrated by Figure 6, Central and South-East geographical areas have a higher share of social innovation projects co-funded by Interreg. On the contrary, the North and North-East areas show a lower presence of social innovation projects.

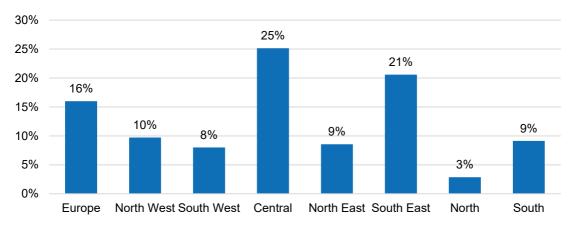


Figure 6: Geographical distribution of social innovation projects

Additionally, the projects included in this study can be clustered according to the main thematic areas and sectors targeted. Figure 7 illustrates the presence of different identified clusters. The projects contributions revolve around business support and social entrepreneurship (20%), as well as service innovation (16%), democracy and social inclusion (14%) and health and social care (13%). In turn, the clusters less represented across social innovation involve transport and mobility (4%), gender initiatives (4%) and digitalisation (3%). However, it should be noted that business support and social entrepreneurship and service innovation, despite being the most represented clusters, have the lowest average funding per project. On the contrary, the less present clusters receive a higher budget size.

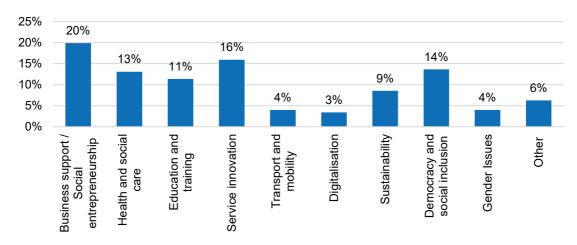


Figure 7: Overview of clusters of Interreg social innovation projects

The main topics are common to all strands of Interreg programmes: interregional, transnational, and cross-border programmes. However, the distribution of these clusters varies across them. Transnational programmes tend to cover more topics related to clustering and economic cooperation or health and social services than cross-border programmes. While the latter mostly covers aspects related to education/ training, innovation capacity, and awareness-raising. Moreover, interregional programmes tackle to a greater extent rural and peripheral development compared to transnational and cross-border programmes.

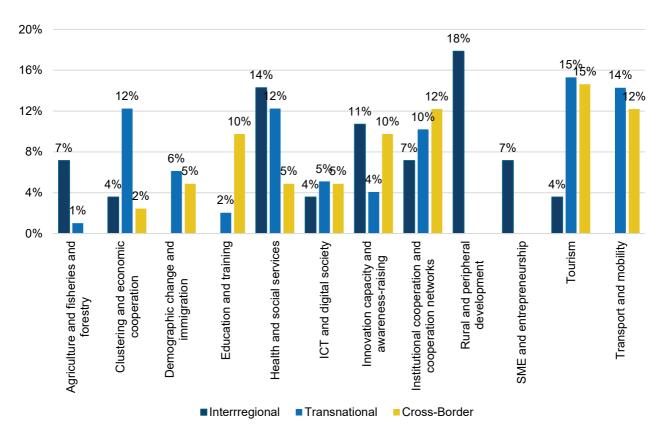


Figure 8: Overview of clusters of Interreg social innovation projects per type of programme (Interregional, transnational and cross-border)

Additionally, the **representativeness of clusters varies across regions**. Table 1 shows that while business support, health, and social care, or democracy are more present in Central and South-East regions, service innovations are more frequent in Southern Europe, and the transport and mobility cluster is more present in North-West Europe.

	Business support / Social entrepreneurship	Health and social care	Education and training	Service innovation	Transport and mobility	Digitalisation	Sustainability	Democracy and social inclusion	Gender issues	Other
Central	29%	35%	25%	11%	14%	17%	20%	38%	0%	36%
Europe	11%	22%	10%	14%	0%	17%	40%	13%	14%	18%
South West	6%	0%	15%	14%	14%	17%	7%	8%	0%	0%
South East	34%	17%	25%	14%	14%	33%	13%	17%	29%	0%
North	3%	4%	0%	4%	0%	0%	0%	0%	14%	9%
South	6%	4%	5%	18%	14%	17%	7%	0%	14%	27%
North East	3%	9%	15%	7%	14%	0%	7%	17%	14%	0%
North West	9%	9%	5%	14%	29%	0%	7%	8%	14%	9%

Table 1: Geographical distribution of clusters

The analysis of the contributions of Interreg projects not only focuses on social innovation clusters and geographical scope, but also identifies the main outputs produced by these projects. The following figure illustrates the diverse outputs produced by Interreg social innovation projects and their proportion.

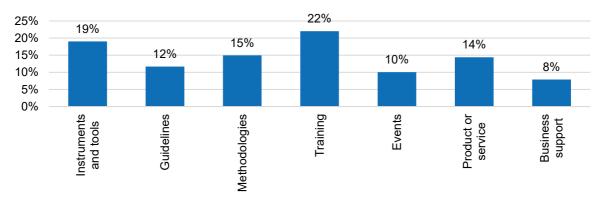


Figure 9: Overview of main outputs produced by Interreg social innovation projects

Interreg project contribution to social innovation is diverse. The outputs⁵ delivered by projects can be arranged in several larger groups. The description is further illustrated with specific project examples. However, this list is not exhaustive, and used only for illustration purposes:

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⁵ Instrument and tools (platforms, databases, and policy instruments, among others); Methodologies (non-tangible outputs such as the establishment of methods through dialogue and stakeholder involvement and/ or new ways of proceeding and behaving); Training (education-oriented activities, such as

- Creation of new or enhanced instruments and tools: For example, the project Cœur'ALP Solidaire (Interreg France Italy (ALCOTRA) programme) created a database where all the health and care services, their contact, availability, and location were displayed in a user-friendly interface to strengthen the presence of social services in the Hautes Vallées rural area. Another example is the BaltCityPrevention project (cofinanced by the Interreg Baltic Sea Region programme), that created a toolbox, which is currently being tested to check its efficiency in helping health personnel to plan, implement and evaluate health promotion interventions.
- New methodologies and creation of sustainable networks: For instance, the project AlpSib (co-financed by the Interreg Alpine Space programme) delivered a common methodology for Social Impact Investments (SIIs) policies, as well as created a transnational network for the public, and private, social partners and capital-projects matching.
- Capacity building/Training: The project EYES (Empowering Youth through Entrepreneurial Skills, co-financed by the Interreg North-West Europe programme) provided bilingual online training to NEETs, as well as coaching and career guidance.
- Toolkits/Guidelines: The project RESENS (co-financed by the Interreg Sweden -Norway programme) produced a book with information, experiences, and practical examples in the field of social entrepreneurship, that other interested organisations can use to evaluate their own case and even transfer those practices.
- Organisation of exchanges and events: The project Chebec (co-financed by the Interreg MED programme) which aimed to revitalise the creative and cultural sector in the Mediterranean area held a variety of meetings and events such as the MED for YOU in Athens or international mobility actions bringing together cultural and creative industries to promote networking between companies and professionals of the sector.
- New or enhanced products or services: the project CCC (Change Cancer Care cofinanced by the Interreg Germany – Denmark programme) developed four innovative diagnostic and treatment methods aiming at reducing the cost of cancer treatment, which will be available to be used once the project lifetime is finished. They also provided a new service, in which breast cancer patients would be able to take their own blood tests at their homes.
- Frameworks for business support: Here, the project ENTER-transfer (co-financed by the Interreg Central Europe programme) may serve as an exemplifying case. Its goal was to facilitate the succession process in family enterprises. It provided a streamline for this process and helped sustained family-owned companies through a matchmaking portal and advice-provision on their business strategy.

proper trainings, workshops, skills acquisition and both formal and non-formal education); Guidelines (issuing documents, templates and white papers for others to use and transfer a certain practice(s) and ease processes where specific documents are needed); Event (celebration of meetings, get-togethers, Hubs, conferences to develop the project); Product or services (provision of a product or service emerging form a societal need that the project seeks to tackle); Business support (financing, advice and orientation services given to business or social entrepreneurs to further advance with their ventures).

2.3. Illustrative examples of how INTERREG funded projects are contributing to social innovation

Due to the variety of challenges and needs which are addressed by Interreg programmes and co-financed projects, as well as the programme scope and setup, the contribution to social innovation varies to a great deal. For example, **transnational programmes** have performed well addressing business-related issues and developing solutions for improved policy environments, as well as working and developing systematic solutions and improving the business and policy ecosystem. Most projects addressing social innovation, social inclusion and care issues were implemented within the framework of the Interreg transnational programmes. The programmes either highlighted social innovation through their focus on non-technological innovation or through specific call focus. For example, the Interreg Central Europe programme had a specific call dedicated to social innovation projects, enhancing the attention given to the topic.

Moreover, transnational programmes offer an ideal space for new methodologies (i.e., previous studies on the regions, co-creation, 4-helix stakeholder involvement) and experimentation (i.e., pilot actions). Here it is worth mentioning the +RESILIENT project co-financed by the Interreg MED programme. The aim of this project is to tackle the need for innovation leading to increased competitiveness of socially responsive SMEs and stimulate new jobs, especially for companies operating in the social economy. The main feature of this project relies on its approach, as it entails a three-phase process: a) an initial study phase at the beginning to understand the baseline situation and needs of the different regions, b) development of pilot actions during the testing phase based on the study performed, and c) capitalisation of the results and their dissemination. Furthermore, the mix of partners involved (4-helix: social economy organisations, enterprises from the private sector, public administrations, and research institutions) enabled an accurate definition of needs and priorities. Thus, they were able to identify the needs and effectively target them through the study and implementation phases, as well as to capitalise on results, through the transfer of experiences to other regions and among partners, and develop policy commitments for the long-term, increasing the sustainability of the project.

On the other hand, **cross-border programmes** have proved to be very effective at tackling border obstacles in a more implementation-oriented fashion. Interreg cross-border cooperation serves to identify shared problems in border regions and solve them jointly. They manage territorial and/or sectoral challenges that are not necessarily a priority at the national level in a single country.

Cross-border programmes can enlighten forgotten or less prioritized issues and bring relevance to them, as well as tackle them where public authorities cannot. Thus, they contribute to problem identification as much as to problem solving, with the possibility of scaling up and transferring the actions undertaken if those issues respond to a wider pattern (i.e., they are present in more than two countries). To mention an example, the Path 2 project co-financed by the Interreg Two Seas programme, aimed at preventing, diagnosing, and successfully helping parents suffering from perinatal mental illnesses. The project helped to arrive to conclusions that there is a wider need for public support in the area. As a response, partners developed a plan for follow-up activities to provide a common strategic approach, to be further financed by the transnational programme Interreg North-West Europe.

Another feature that makes cross border programmes advantageous is their ability to join forces from two countries. For instance, the programme between Lithuania and Poland within its priority 3 (Promoting social inclusion, combating poverty and any discrimination) was able to develop

place-based projects to tackle the issue despite the differences between the two countries. Implementation was thus powered by the common challenge. This can be seen in the project "Trapped in celluloid-cinema as a social inclusion tool", from the same cross-border programme. The project promoted cinema as a tool for social inclusion, creating physical spaces for vulnerable populations (mainly youth and seniors) to use their creative potential and feel included in society. The evaluation elaborated by the programme highlighted the bottom-up fashion of their methodology as a great strength, as well as the continuity that many projects during the 2007-2013 period saw in the 2014-2020 period.

Lastly, cross-border programmes may encourage deep changes in national settings toward greater cohesion. As observed in the context of the Interreg ALCOTRA programme, more concretely in their COEUR ALPS SOLIDAIRE project, an adaptation in the health care system had to be made in the regions of Piamonte (Italy) and Hautes Vallées (France) to develop a common database of services available and to ensure a pathway to those services to the population in the region. Thus, the project represented an impulse towards regional cohesion, since it was needed to improve the quality of the service (in this case, of health care).

Interregional programmes, in turn, attempt to construct networks to develop good practices and promote the exchange and transfer of experiences between regions. Thus, it is a great tool to develop cohesive policies among countries and tackle jointly present and future issues.

Interregional programmes contribute to creating a lasting hallmark in different regions. For example, URBACT III programme, where more than 80 networks containing 8 to 10 cities in each one was built, tracking behavioural change and organisational changes in their projects and sharing those outputs and experiences. Interreg Europe Programme co-financed 23 projects on social innovation during the 2014-2020 implementation period. The programme focuses on capacity building and policy influencing, creating a long-term impact. Furthermore, this programme has a powerful monitoring system to evaluate the impact achieved. As a result, the programme has compilated stories of policy change. An interesting project within this programme is the HoCare project. The project brought telemedicine to an ageing population in Cyprus, allowing them to live independently despite chronic illnesses and other persistent health problems.

Like transnational programmes, interregional programmes leave room for experimentation and for developing different responses to a common challenge, however, a larger focus is placed on mutual learning, networking, and solution transfer. For instance, in the Active Citizens project (co-financed by URBACT III programme), three phases were established. First, a baseline analysis of the issues to be tackled; second, a small-scale action to experiment; and third, an integrated action plan, considering all the projects and conclusions to see what actions were better for which cities. This is a clear example of transferability, joint learning, and increased value thanks to its interregional character. As a concrete action transferred, the project developed co-decision activities in schools. This was based on the practice used in the municipality of Agen (France), where students were asked to reorganise a public space (such as a park).

To conclude, interregional and transnational programmes are effective and suitable to develop common policies and frameworks with a more strategic approach, as they aim to overcome big common challenges, as well as test and develop new solutions and tools. Cross-border programmes have a stronger regional and local focus and excel at the implementation level when facing concrete local and/or regional challenges.

3. Interregional co-financed projects contributing to social innovation in 2014-2020: key achievements, strengths, weaknesses and challenges

This section provides an overview of the main achievements, strengths, and weaknesses; as well as key lessons learnt from diverse Interreg programmes and projects in the field of social innovation (2014-2020 period). The following table summarises the main findings from this section.

Achievements Strengths Conducting needs' analysis Close and continuous communication Involvement and engagement of local Stakeholders' track record and expertise actors Flexibility to deliver tailored actions • Participative methods (co-creation and co-decision) • Exchange of practices between international actors Involvement of diverse stakeholder typologies Long-term outputs Weaknesses Implementation challenges Politically sensitive topics Lack of general understanding, clear definition, and consensus regarding COVID-19 Engagement of crucial stakeholders social innovation concept sometimes lacking financial and infrastructure capacities Support from local politicians and public administrations Social needs change and evolve over time Temporary nature of projects

Table 2: Overview of main achievements, strengths, weaknesses, and challenges of Interreg programmes and projects

3.1.1. Key achievements

The in-depth analysis and interviews carried out has been crucial to ascertain and identify the main achievements of Interreg regarding social innovation.

 Needs' analysis before the implementation have been conducted to properly identify the specific needs of the target group, particularly at the local level.
 Addressing social or societal needs is intrinsic to social innovation, therefore, it is crucial

 $^{^{\}rm 6}$ A comprehensive list including all programmes covered through interviews is presented in Annex 1.

to carry out an exhaustive and accurate identification of target group needs. Social innovation projects include either a study phase prior to the implementation, or a needs analysis at the beginning of the project that allows the identification of the main issues to be tackled.

Project examples

The **DuALPlus** project (co-financed by the Interreg Alpine Space programme), related to dual education and career guidance, conducted an analysis in the first part of the project through interviews with SMEs, asking for their needs in terms of dual education. They also interviewed young people and parents about their needs concerning the decision to undertake further education.

Before sketching the main actions of the project, the **DANOVA** project (co-financed by the Interreg Danube Transnational programme) involved a local assessment in each pilot site to identify the current status and needs with regard to accessibility for blind and partially sighted people. In this case, essential needs were identified through stakeholder involvement and gathering.

The **ActiveCitizens** project (co-financed by URBACT III programme) included a baseline study that involved interviews with citizens, civil society associations, and elected officials to spot the most pressing social needs.

AYCH project (co-financed by the Interreg Atlantic Area programme) also relied on local youth organisations to identify the issues and needs of youth and the progress that had already been done in that area.

Active involvement and engagement of local actors: Social innovation projects
financed by Interreg are characterized by their regional and local implementation level,
targeting very concrete needs. As a result, one of the key achievements to be highlighted
is the involvement of local stakeholders since they are a powerful source of information
about the social and local needs as well as the main actors to work with at the
implementation level.

Project examples

The **Arrival Regions** project (co-financed by Interreg Central Europe programme), a project dealing with migration and refugee integration, relied on local authorities to obtain information on the main requirements of their target population.

The **ActiveCitizens** project (co-financed by URBACT III) partners visited the cities involved in the project and asked people on the streets about their opinions and suggestions regarding the need for improvements in the city.

Similarly, the project **Social Plate** (co-financed by Interreg Greece-Bulgaria) sought to organize and involve local producers and food chains to manage food waste, achieving that more than 464 tons of vegetables were re-distributed through local actors such as NGOs. Thus, the whole project relied on local actors for its goal attainment.

• Participative methods, namely co-creation and co-decision are essential. This approach was found to enhance dialogue, transparency, lasting engagement of diverse stakeholders, and the overall quality of the output of the projects. For example, the

URBACT III programme saw a shift from top-down processes to bottom-up processes. Participative processes also motivated local public officers to perform their duties outside of the conventional framework, joining and observing the activities carried out by the diverse projects and playing a role in them. The Interreg North Sea programme also identified that having citizens and stakeholders on board when making decisions is a constructive move. They suggested that having citizens' organisations involved is highly practical since it reduces the cost of mobilising citizenship to participate in the projects.

Project examples

My Generation - a project co-financed by URBACT III, in which a youth parliament was created in Rotterdam to influence and give the youth the ability to engage in local politics.

RESILIENCE + (co-financed by Interreg MED programme) praised the participatory and multistakeholder character of their project.

The cross-border project between Latvia-Lithuania, named "Dialogue in the silence and in the dark", co-developed a film exploring the reality of deaf and blind artists by directly involving the target group in the process. To achieve this, the participants were trained, so that they could be a part of the film from its earliest stages.

• Exchange of practices between international actors. The exchange of ideas among stakeholders from different regions was referred to as being very fruitful. For example, the Interreg MED programme highlighted the added value of having a transnational input to local initiatives respecting the local environment and field of application.

Project examples

The **DuALPlus** project (co-financed by Interreg Alpine Space programme) highlighted the benefits of bringing together different sectors and states since it enabled learning from each other across national borders.

The **D-CARE** project (co-financed by the Interreg Danube Transnational programme), in turn, focused on establishing a transnational cooperation network that designed Innovative Learning Environments for older adults 55+ in 9 Danube regions, to facilitate the creation, validation, and deployment of transferable smart care services in the context of smart care labs.

• Involvement of diverse stakeholder typologies. A key accomplishment of Interreg social innovation projects is the 4-helix approach, having the suppliers, providers and end-users involved. These partnerships include public authorities, higher research, civil society (NGOs) organisations, citizens' organisations, and the business sector working together towards the same goal. This enriches the project thanks to the different views and perspectives provided by the stakeholders as well as the information that each actor provides. Moreover, it allows the creation of local stakeholder networks.

Project examples

The **Arrival Regions** project (co-financed by Interreg Central Europe programme) highlighted the diversity of the partnership as a crucial factor of the project ranging from municipalities to regional bodies dealing with migration and to some NGO's. Moreover, it enabled stakeholders to find new partners from the region, therefore the project promoted community building.

ENISIE (a cross-border project co-financed by Interreg Italy-Malta) gather among their participant's students, professors, start-ups, farmers, freelancers, restaurant owners, agronomists, and others in their main event, mixing them randomly in working tables.

• Long-term outputs extended over the time horizon of the project, increasing the sustainability of the results of the project. Social innovation projects are characterised by interventions dealing with people, therefore the knowledge and skills transferred continue over time. Moreover, most projects develop outputs including guidelines, best practices repositories, or action plans.

Project examples

Path 2 (co-financed by the Interreg Two Seas programme) provided training and advice to new parents that national health systems could not reach. The training is still ongoing and will be further developed in the follow-up project, given their success and the need for that service in those countries.

In the case of **ActiveCitizens** (co-financed by URBACT III), the project developed an action plan tailored to each city from the project, that will be implemented by the competent municipality once the project ends.

The **PlurAlps** project (co-financed by Interreg Alpine Space programme) developed a social planning instrument to collect relevant data on demographic development and services that allow municipalities to have more realistic planning. A key success of the project is that this instrument remains in place after the project has been implemented.

Coeur'Alps Solidaire (project co-financed by Interreg ALCOTRA) created a database listing all the social services available in the region, so that anyone in a sparsely populated rural area could see the available services, where and when, digitalising the medical assistance through COVID-19 and beyond.

Another project to be mentioned is, the Interreg North Sea Region co-financed project **Like!** The project developed partners' skills and knowledge of digitalisation enabling the use of smart technology in public services. For example, one of their case study papers dealt with the use of blockchain technology for debt relief, showing its benefits and leading to a new use of such technology in the municipality of Groningen.

To conclude, creating the basis for long-term impact, can be especially highlighted as the core achievement of Interreg programmes and projects during the 2014-2020 period. Many projects delivered guidelines and white papers for public authorities and partners to continue the efforts of projects. Projects also introduced new methodologies in public administrations and provided training, all having long-lasting effects in the field of social innovation. Projects also developed tools like databases and digital applications to improve service provision and create spaces and networks of social engagement that continued after the project closure.

Project examples

In For Care (co-financed by Interreg North Sea) which established a nexus between the health sector and young volunteers, worked on the creation of accreditations for those volunteers to certify their experience and enrich their CV; a hallmark that they can keep once the project is over.

Another example is the camps created by the **Igda vs. poverty project**, co-financed by Interreg Latvia-Lithuania. It involved more than 300 children in vulnerable situations to improve their social inclusion through training and activities developed in these camps (which ranged from more formal education to education in social skills).

3.1.2. Key strengths

Strengths are positive internal factors that are controlled by the programme or project that provide significant foundations for the future. As a result, this section of the analysis covers the identification and description of the core strengths of social innovation interventions financed by Interreg. Recognising and indicating the strong points of social innovation interventions will help to further promote social innovation in the future. An overview of the main strengths is presented below:

- Close and continuous communication both with the stakeholders involved and within the partnership. It is fundamental to have an ongoing flow of information between the project managers, target groups and stakeholders. Thus, the communication strategies may vary to adapt to the context and reach stakeholders more effectively. For example, the URBACT III programme mentioned the use of social media to increase engagement among the youth; and the Interreg MED programme also suggested the advantage of having a user-friendly interface for smaller and less experienced stakeholders to get involved. Moreover, as the Implementation Manual from the Danube Transnational Programme states, "the success of project communication depends on establishing and developing continuous relations with the key audience (target groups previously selected) during the whole project duration". Additionally, continuous, close, and face-to-face communication with the partners is essential to guarantee that no one is left behind, and, given the new and abstract nature of the concept of social innovation, to agree on a common understanding and approach over the course of the project.
- Stakeholders' track record and expertise. It is very important to have a qualified lead partner, as well as the support of local politicians and public administrations. For example, in the Interreg Atlantic Area programme it was observed that, due to the inherent vagueness of the concept of social innovation and the multiplicity of forms it can take, it was crucial to have a lead partner capable of grounding the concept and specifying the actions and purpose of the project in question. Several projects stressed the added difficulty of working with non-experienced stakeholders, which could be addressed

⁷ https://www.interreg-danube.eu/uploads/media/default/0001/42/06976b014905c7ae0031dc4e7b7aa1927778869a.pdf p.18.

through training sessions and other support to the less experienced stakeholders. Regarding public entities, having political support was considered a high determinant for project and output development. Interreg Alpine Space and URBACT III programmes stressed that projects gain strength when politics support them.

• Flexibility to deliver tailored actions to the concrete needs of each city/region. For example, the AYCH project (co-financed by the Interreg Atlantic Area programme) highlighted that flexibility in implementing tailored actions for each region was their strength, as the same intervention would not have suited the concrete characteristics and needs of the region. Instead, it was more enriching to have different approaches, given each concrete context, to achieve the same objective. Given that the goal of social innovation is addressing social needs, allowing for suitable and customized actions is a crucial feature projects should include.

Project examples

The **ActiveCitizens** project (co-financed by URBACT III) developed small-scale actions for each city partner based on the concrete needs identified for each city.

RESILIENT+ (co-financed by the Interreg MED programme) conducted a study phase that identified very different baseline situations across the different regions involved. As a result, the ten pilot actions developed within the project targeted the specific needs and challenges identified in the study phase.

3.1.3. Main implementation challenges

Prior to exemplifying specific implementation challenges identified for social innovation projects, it is important to highlight the **lack of common understanding and consensus regarding the social innovation concept**. Due to the novelty, complexity, and abstractness of the concept, many people and partners involved in social innovation projects may not have a shared agreement on what social innovation is. The intricate nature of the concept led +RESILIENT partners to conduct several meetings and spend time andefforts to give a common definition and understanding of social innovation. Consequently, not only can it be a weakness inherent to social innovation programmes and projects, but also it challenges social innovation implementation.

Other challenges can be grouped as follows:

• A usual circumstance interfering with the steady development of social innovation projects is the presence of politically sensitive topics. As highlighted by the URBACT III programme and Arrival Regions project (co-financed by Interreg Central Europe), the presence of highly sensitive or controversial political topics (such as migration, gender-oriented policies, or Roma population integration) can hinder political and financial support; while other innovative actions that do not have a social focus do not encounter this barrier. Whether there is a political consensus that the project is beneficial or not determines very much the help and contribution the project is going to obtain from public authorities. The PlurAlps project (co-financed by Interreg Alpine Space) highlighted the volatile nature of political attitudes concerning certain topics. Thus, a project's development can be reversed to some extent if the political authorities change during that

period and so does their commitment and interest in the project the previous authorities agreed on.

- Among the challenges more frequently mentioned is the COVID-19 crisis which affected project and programme implementation at the end of the 2014-2020 financial period. The main impact was a delay in virtually all types of projects. However, social innovation projects faced specific challenges. The Interreg Central Europe programme highlights that social innovation projects working in the field of elderly people faced significant obstacles when reaching the elderly population, as they were the most vulnerable sector during the pandemic. Moreover, social innovation projects rely to a great extent on faceto-face interventions, events, and training that could not be delivered. Similarly, many social innovation projects target the labour market integration of vulnerable groups. The COVID-19 situation also brought economic stagnation in some regions, impeding the successful implementation of projects related to labour market integration and employment. In the case of Coeur'Alps Solidaire financed by Interreg ALCOTRA, the closure of frontiers and in-presence administrative services highly conditioned the success of the project, since they could not even communicate properly in the beginningand establishing a common care system became an unattainable task for a long period.
- Engagement of crucial stakeholders sometimes lacking financial and infrastructure capacities, mainly NGOs. The Interreg Danube Transnational programme mentions the need for further expertise of some partners, particularly NGOs, that could not fully engage in these projects due to a lack of financial capacity. As seen in the Interreg Baltic Sea Region programme, it is difficult to involve civil society organisations to develop social innovation initiatives on their own, and, sometimes, to even take part in the programme's financed projects if their capacity is not so strong. Because of this, the Interreg MED programme established as an objective the implementation of an appropriate interface to give social innovation actors accesses to the programme through a more friendly, filtered channel. For example, through social media and bilateral meetings to have further discussions on the issues that were more difficult to grasp.
- Another commonly observed challenge faced by social innovation projects concerns obtaining support from local politicians and public administrations. Social innovation requires the involvement of public and private sectors, with politicians and public administrations' support being crucial, as they are the governing bodies of the societal actors targeted. Moreover, political support is also subject to change because of elections. Therefore, even when the project is befriended by the political power, if the opposite party wins the elections, it might be reluctant to support a project established by the previous party, as remarked by the interviewed projects.
- Social needs change and evolve over time. As already mentioned, an intrinsic feature of social innovation is that it aims at tackling social needs. However, these needs can change between the application and implementation stages, as it happened, for example, in the Arrival Regions project (co-financed by Interreg Central Europe). The original target group (migrants) were already gone by the time the project was being implemented and it was time-consuming and required effort to reach the new ones and gain their trust. Moreover, the irruption of COVID-19 has exemplified the fast emergence of new needs as well as the evolution of previous needs.

• Temporary nature of projects. Social innovation projects are characterised by addressing social needs that are persistent over time, while projects tend to have a temporary nature of an average of three years. Interviewed projects and programmes mentioned that a four-year project could be appropriate to see a full implementation of the initiative. Especially, as a certain time is needed to start the implementation activities. For example, the Arrival Regions project mentioned that it took two years to get the project started, adding to it a rather lengthy application submission process. Similarly, the DuALPlus project (co-financed by Interreg Alpine Space) mentioned that the results or impact were to be seen later, not within the project implementation period. This is the reason why producing long-term outputs or even changing behaviours and practices that persist over time is one of the highest accomplishments a project can attain —as mentioned by the URBACT III programme and project partners.

3.1.4. Lessons learnt

Identifying and understanding good practices and lessons learnt from Interreg programmes support to social innovation and projects becomes essential for the improvement of future interventions in the field of social innovation. The in-depth analysis conducted has identified the following emerging findings:

- Smaller projects to react quickly to emerging needs. The Interreg Alpine Space programme realised there is a need to respond to emerging challenges that cannot be foreseen —such as the migration crisis or the COVID-19 pandemic. This reflection exercise made them develop small-scale projects, that have a smaller partnership (3 to 6 partners) and a shorter implementation period (12-18 months). There is a simplified call approach with a one-step procedure instead of a two-step used in the case of regular project selection. Decisions on project selection are taken twice a year. This allows them to react much faster and reduces the time delay between application and implementation. This initiative has been identified as a good practice, as it allows the development of social innovation projects that relieve an emerging need or new phenomena that require quick intervention. A similar approach has been implemented for the new period in other programmes as well, illustrating the advantage of these small-scale/micro projects. Additionally, some cross-border programmes such as Interreg Slovenia-Italy, Interreg Slovenia-Austria, and Interreg France-Belgium have also implemented microprojects already within the 2014-2020 period.
- Production of long-term and/or intangible outputs that expand over the time-horizon of the project. A key challenge mentioned previously is the short-term nature of Interreg projects, which cannot overcome to a full extent the societal challenges addressed. Therefore, producing intangible outputs as well as long-term outputs (guidelines, repositories, methodologies, action plans...) increases the sustainability of the project as well as its transferability to other regions and countries. Another key advancement in this sense is the shift to tested and piloted solutions, an approach introduced in the new programming period of programmes such as, the Interreg Baltic Sea Region. It consists in highlighting the need to develop the outputs together with the target groups, and pilot them to ensure durability, following a co-creation approach. These have been present in other programmes as well, for example, the Interreg Central Europe programme and the Interreg Europe programme.

Project examples

The **iEER** project co-financed by Interreg Central Europe, developed a pilot action Aula Emprende that reached more than a thousand students in nine different regions in a period of one and a half years.

- Having a close monitoring system to react timely to possible deviations or changes could significantly improve the results of the projects. Social innovation and social outputs are not always easy to measure. Nonetheless, monitoring and evaluating projects and programmes is essential to evaluate progress, identify strengths, weaknesses, gaps, deviations from the initial plan, etc. and allow for fast reactions. Therefore, including indicators and monitoring is a crucial factor to succeed and achieve the planned objectives. For instance, the PlurAlps project (co-financed by Interreg Alpine Space) stressed the benefit of including quantitative indicators to evaluate their performance, namely, the number of pilot actions or public policies influenced by their project, among other indicators.
- Project chain possibilities and scale-up potential. A key emerging finding has been
 the identification of project chain possibilities within Interreg, but also with other EU funds
 and in the context of wider frameworks such as, e.g., EU macro-regions.
 - Within Interreg programmes

Project examples

The **CERUSI** project, co-financed by the Interreg Central Europe programme, capitalised on results from previous Central Europe projects (Social(i)Makers and SENTINEL) but also Horizon projects (LiveRuR). Synergies were found also across Interreg programmes.

The project **IN SITU** (co-financed by Interreg Central Europe programme) created a training and mentoring programme for the long-term unemployed, which was planned to take place in social innovation hubs established earlier in another project named CERIecon (co-financed by Interreg Central Europe).

o Between Interreg programmes

Project examples

HoCare2.0 project co-financed by the Interreg Central Europe programme, built on learnings and results from HoCare, a project funded by the Interreg Europe programme.

With other EU funding instruments

Project examples

The **Interreg Central Europe** programme devoted its fourth call to increase the impact of transnational cooperation projects in the regions through the exploitation of existing outputs

and results in coordination with other EU instruments (Horizon 2020/7th Framework Programme, LIFE, Connecting Europe Facility, Creative Europe...). One of the seven topics covered by this call included social entrepreneurship: specific objective: 1.2 To improve skills and entrepreneurial competences for advancing economic and social innovation in central European regions. It consisted of a new impact-driven coordination mechanism between different EU instruments, highlighting the existing unexploited synergies between EU funds

The **CERUSI** project (co-financed by the Interreg Central Europe programme) was built on the results of a Horizon project. Other synergies have been found between Interreg and ERASMUS+.

The Interreg Alpine Space co-financed project **DuALPlus** was followed by an Erasmus+ project (FutureSkills4Trainer) that build on the outputs and results as well as on the partnership (5 out of the 6 partners were involved in DuALPlus) of the Interreg project. The core of the project is the development of a further vocational training course, a concept that had been developed in the DuALPlus project.

 Within larger territorial frameworks. Interreg cooperates with a wider territorial scope (i.e., EU macro-regions, Neighbouring and pre-accession instruments, and outermost regions).

Project examples

The **EU Strategy for the Danube Region**, Priority Area Coordinators receive financial support from the Interreg Danube Transnational programme, and link different projects in the region to further enhance scale-up possibilities. The coordinators also support the work of the ESF Managing Authorities Network. This network has provided ESF programmes and projects in the Danube region with a common transnational platform for the exchange of experience and development of transnational activities and initiatives. Among its contributions, a call for "Transnational and Danube Partnerships for Employment and Growth" can be highlighted. It was financed under Bulgarian ESF OP and led to <u>cooperation</u> between Bulgaria and Germany to address the specific needs of ROMA women in Bulgaria.

o Between Interreg projects

Project examples

socialinterreg.eu, a campaign promoting social innovation projects within Interreg. It was cofinanced by the German Federal Programme for Transnational Cooperation. This initiative is a bottom-up cooperation that emerged from the Interreg projects initiative and enables to build a repository of social innovation projects financed by Interreg and exchange practices across the involved projects.

4. How Interreg programmes can support social innovation in the new programming period

As mentioned above, during the funding period 2014-2020 Interreg programmes have financed around 176 projects targeting social innovation, amounting to over 340 million euro of total funds devoted to the financing of social innovation projects. Social innovation projects financed by Interreg have contributed to meet relevant social needs through the development of instruments and tools, delivering training and events or developing new products and services. Moreover, these projects have focused on business support, fostering democracy and social inclusion of vulnerable groups, promoting health and social care available to others, or enhancing education and skills across regions.

This section identifies the main themes, gaps, and niche areas in social innovation that Interreg could cover for the current period (2021-2027). This requires firstly an understanding the specificities of the programme to accurately ascertain the areas for Interreg intervention in the field of social innovation.

4.1. Interreg main characteristics

Based on the findings already identified and defined Interreg contributions and interventions in the field of social innovation during the 2014-2020 period— and taking into consideration the characteristics and scope of Interreg, the niche area for Interreg to promote social innovation for the 2021-2027 period is described as follows.

Interreg programme requirements and characteristics

Interreg performance during 2014 -2020 period

Interreg has financed projects focusing on SME and entrepreneurship, social inclusion and equal opportunities and health and social care. The main outputs produced involve instruments and tools as well as training, which create a long-term impact. Moreover, Interreg social innovation significance is higher in Central and South East geographical areas. Finally, most projects (over 50%) cover Thematic Objective (TO) 1^s.

Interreg possibilities in the 2021-2027 period

Interreg possibilities to promote social innovation relies on projects characterised by:

- Time limitation: normally less than three years. Nonetheless, the new programming period includes shorter small-scale projects.
- Restricted budget: projects tend to have a budget not exceeding 3 million euro. Moreover, ERDF co-finance rate does not exceed 80%, with participating organisations covering the remainder.
- Partnership: Interreg projects have a regional collaboration focus. Therefore, projects rely on a partnership of eligible participants:
 - National, regional, or local public authorities
- Institutions governed by public law
- Private nonprofit bodies.
- Thematic focus: 5 EU's cohesion policy main priorities and 2 Interreg specific priorities (better Cooperation governance and a safer and more secure Europe). Although social innovation is a horizontal topic that can be encompassed in all priorities, it is highly integrated into priority 4: a more social and inclusive Europe, with a specific reference in relation to the role of culture and sustainable tourism.

Table 3: Overview of Interreg main characteristics

Regarding the **thematic areas** and priorities for the 2021-2027 implementation period, Interreg will focus on the main social challenges of Europe, which are related to the main local and regional needs, involving **education and labour market integration**, **green transition**, **health care and ageing population**, **migration**, **smart growth**, **and a democracy closer to citizens** Moreover, considering the reduced budget to deliver innovative and technical solutions compared to other EU funds such as Horizon, Interreg programmes would benefit from directing

⁸ Strengthening research, technological development and innovation

⁹ A more competitive and smarter Europe (PO1); A greener, low-carbon transitioning towards a net zero carbon economy and resilient Europe (PO2); A more connected Europe (PO3); A more social and inclusive Europe (PO4); A Europe closer to citizens (PO5)

¹⁰ A more competitive and smarter Europe (PO1); A greener, low-carbon transitioning towards a net zero carbon economy and resilient Europe (PO2); A more connected Europe (PO3); A more social and inclusive Europe (PO4); A Europe closer to citizens (PO5)

the attention to projects with lower technical research and a **stronger implementation** approach.

Furthermore, Interreg is characterised by its **regional multistakeholder collaborative** methodology, including **public authorities**, which intersects with the social innovation objective to target local social needs through a collaborative approach. Therefore, Interreg can reach the biggest impact by focusing on the comparative advantage that having multistakeholder actors involved offers, as they can provide **powerful knowledge on the local and regional societal existing needs, which becomes crucial for social innovation**. Similarly, the regional focus of Interreg is clearly aligned with social innovation and is further strengthened through the inclusion of the public sector and political authorities among the set of stakeholders involved. It allows to be aligned with national and regional strategies and is closely related to governance, democracy, and smart growth thematic areas among others.

Finally, social innovation inherently targets needs and issues of a social nature. However, these needs evolve over time, turn into other challenges and, often, new emerging needs and challenges arise. As a result, social innovation projects must be flexible enough to respond to them timely and accurately. Interreg has included **small-scale projects** for the new programming period, that have a lower time-horizon as well as easier and more accessible requirements. This awards Interreg a comparative advantage to respond to challenges that may arise, such as the migration crisis, COVID-19 or the war in Ukraine.

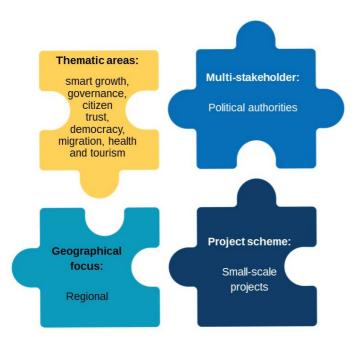


Figure 10: Overview of the main niche areas for Interreg

4.2. Main lines of action for the new programming period to promote social innovation

As highlighted by MAs from diverse Interreg programmes during interviews, social innovation is going to see an increased presence for the upcoming programming period. Furthermore, the interviewed MAs illustrated the growing relevance of social innovation across the evolution of

different programming periods, starting with a low or almost absent relevance of social innovation in 2007-2013, mainly due to a lack of understanding of the topic, to an increased relevance and presence in 2014-2020 with some programmes including concrete areas or objectives covering social innovation. Thus, the majority of programmes realised the importance and the essential role of social innovation in the context of Interreg, including it in the new programming period as a horizontal principle present in all areas of work, as can be seen in programmes such as the Interreg Baltic Sea and Interreg Med.

Based on the analysis conducted on the potential areas for Interreg implementation, a set of lines of action to ensure that Interreg programmes effectively enhance social innovation in the 2021-2027 period are presented below:

- Synergies and collaboration with other funds that have greater financial and infrastructure capacity are highly valuable. As further elaborated in the section below, there are existing potentials for synergies in the field of social innovation with other funds (mainly ESF+, Horizon Europe and Erasmus+) that have a greater financial capacity which Interreg can benefit from collaboration. Therefore, during the 2021-2027 period collaboration and alliance with other EU instruments are to be strengthened to ensure greater and more impactful results regarding social innovation.
- Development of smaller projects to react timely and better. As seen with the COVID-19 crisis, but also as the inherent feature of social processes and issues; rapid changes in status and the arising of new needs can greatly impact a project. Thus, small-scale projects, involving smaller partnerships and shorter implementation periods (12-18 months) represent a tool to tackle the dynamism social innovation requires. They allow for a timely reaction to crises such as, for example, the pandemic or the humanitarian challenges linked to support for temporarily displaced people. The relevance of small-scale projects has already been tested in the Interreg Alpine Space and the Interreg North Sea Region programmes.
- Focus on the niche areas and comparative advantage of having political authorities involved. The previous analysis has identified both niche thematic areas, geographical scope (regional, see figure 12 above) and stakeholders that Interreg could gain the biggest impact by focusing on them, illustrating its comparative advantage compared to other EU funds. Additionally, it has been observed that having public authorities on board can greatly help the successful implementation of a project. Thus, political authorities' involvement contributes to the unique niche of Interreg, as well as to rise these activities to a higher level and reaching further stakeholders.
- Lower requirements for organisations lacking infrastructure and financial capacity, which are mainly NGOs. Not every organisation has the infrastructure and capability to face the requirements and responsibilities of a project. Access adaption to these projects (such as a simplification of their procedures, giving training sessions or lowering the requirements), can be useful to gain their involvement since there are very substantial stakeholders within civil society that face difficulties for pre- and co-financing.
- Seek a strong 4-helix approach, to include all relevant stakeholders. Social innovation is based upon a collaborative approach of stakeholders. It has been proved that including the suppliers, providers and end-users of the innovation is critical to ensure the quality of the project, since they may offer a diversity of knowledge and enrich the

program through the exchange of their ideas. Therefore, Interreg should further promote the inclusion of the 4-helix approach in social innovation projects.

- Long-term output planning is an attempt to overcome the temporary nature of projects, making outcomes available for a wide range of actors in the region but also in other countries, increasing the transferability and impact of the project. A key obstacle EU-funded projects face especially social innovation projects to an even –is the fact that projects are time-bounded while the societal needs targeted persist over time. Moreover, co-creation and co-design activities with target groups and crucial stakeholders, such as piloting actions also ensure longer-term impacts. Therefore, projects delivering long-term outputs such as methodologies, action plans or guidelines facilitate transferability to other regions or countries. Achieving that instruments and actions developed within the project continue once the project ends is a great measure of the sustainability of the project.
- Social innovation is to be given an increased presence across the thematic areas and priorities of each programme, since it is a cross-cutting topic that can be encountered in almost all thematic areas. Therefore, it requires higher efforts to include social innovation as a horizontal topic to include them across the main priorities of the programme and projects. Particularly, many projects deal with green transition, which is both a collective challenge and a social need, evidencing the close relationship between social innovation and other Interreg priorities.
- The link with S3 strategies can be further strengthened. Smart specialisation strategies rely on the identification of areas for intervention based on the analysis of the strengths and potentialities of regional economies. In addition, social innovation focuses on targeting local and/or regional needs. Therefore, there is a link between both phenomena, but it has not been widely exploited across Interreg during the 2014-2020 period. Moreover, social benefits can be a goal assigned to the S3 strategy, along with economic benefits. Overall, Interreg can further develop and implement the link between social innovation and S3, through projects that align the regional strategies with the latter.

5. Benchmark between INTERREG and other EU instruments financing social innovation

Social innovation is promoted at the EU level through a diversity of EU funding schemes. This section presents the benchmark between Interreg, ESF+, Horizon Europe, Erasmus+ and InvestEU on diverse variables including the thematic areas covered, the type and characteristics of projects financed, the budget allocated or the type of beneficiary to understand how social innovation is being targeted at the EU level.

5.1. European Social Fund Plus and potential for synergies

The **European Social Fund Plus (ESF+)** is Europe's main instrument for supporting jobs, helping people get better jobs and ensuring fairer work opportunities for all EU citizens, with individuals being the main beneficiaries. The new European Social Fund Plus (ESF+) will remain the main EU instrument for investing in people: tackling the socio-economic consequences of the COVID-19 pandemic, promoting high employment levels, building social protection, and developing a skilled and resilient workforce ready for the transition to a green and digital economy¹¹.

For the 2021-2027 period, the ESF+ fund has gathered other four funds, namely, ESF; Fund for the European Aid to the Most Deprived (FEAD), Youth Employment Initiative (YEI), and the most relevant for this topic; the Employment and Social Innovation (EaSI) fund. The **EaSI** strand of ESF+ has a budget of € 762 million and focuses on employment and capabilities, labour markets and labour mobility; social protection and active inclusion and working conditions¹². Moreover, ESF+ support for social innovation is also promoted through the ESF Social Innovation+initiative, which aims to facilitate the transfer and upscaling of innovative solutions to the societal challenges of today. Through supporting transnational cooperation, the initiative aims to expand best practices in fields including employment, education, skills, and social inclusion across Europe. It has an overall budget of €197 million for the 2021-2027 programming period¹³. Finally, since 2021, six projects have been selected to spend 2 years building National Competence Centres for social innovation across nearly all Member States. These centres will help Managing authorities to programme and implement social innovation actions, as well as support organisations on the ground with capacity-building and networking measures¹⁴.

Potentials for synergies

ESF+ presents a high potential for synergies because of complementarities in the areas of sustainable and quality employment, educational and vocational training, and social inclusion of

¹¹ https://ec.europa.eu/esf/main.jsp?catId=62&langId=en

¹² https://ec.europa.eu/european-social-fund-plus/en/esf-direct-easi

¹³ https://ec.europa.eu/european-social-fund-plus/en/esf-social-innovation

¹⁴ https://ec.europa.eu/european-social-fund-plus/en/competence-centres-social-innovation

vulnerable groups. These topics are shared between ESF+, and thematic areas that are covered by Interreg programmes – given that these are societal challenges common to many regions.

For the 2021-2027 period, ESF+ offers funding for transnational cooperation focused on social innovation. Moreover, these transnational piloting projects are specifically intended to scale up innovative ideas and solutions¹⁵. This makes the existing synergies with ESF+ visible, and the value of further strengthening them. In addition, the programmes can benefit from cooperation with two existing ESF+ managing authorities networks operating in the Baltic Sea Region and the Danube Region.

Project examples

The **Interreg Danube Region** programme's MA is working on establishing closer cooperation with the ESF+ programmes to have closer synergies in shared thematic areas.

Another example is the <u>Pan-European Social Innovation</u> Lab, which is being financed under ESF. This project is building up national competence centres for social innovation in Belgium, Czechia, Finland, and Lithuania. It is helping to identify the visions, needs, opportunities, and priorities of social innovation stakeholders and promoters to build a shared strategy and action plan specific to each country. Collaboration between the centres developed in this project and Interreg can provide valuable insights regarding national and local societal needs.

Similarly, <u>SI PLUS</u> brings together partners in the Danube Region and focuses on building national social innovation competence centres in the region.

5.2. Horizon Europe and potential for synergies

Horizon Europe being the EU's research and innovation programme focuses on funding researchers, scientists, and businesses. Hence, it has a more technical and empirical approach compared to other EU funds financing social innovation.

Horizon 2020 (2014-2020) addressed social innovation, particularly through the SME instrument, which financed SMEs for innovation projects that would help them grow and expand abroad. This instrument funded a first concept and feasibility assessment phase (i.e., for exploring the technical feasibility and commercial potential of a breakthrough innovation in the industry), an innovation project phase (i.e., innovation projects endorsed by a strategic business plan and feasibility assessment) as well as additional support services for accessing risk financing and coaching. Moreover, the **European Social Catalyst Fund** (ESCF), which was co-funded by Horizon 2020, provides financial support, guidance and information to upscale proven social service innovations selected through a pan-European competition. On another note, ESCF successor, which will be named **European Social Innovation Catalyst Fund**, will be cofinanced by Horizon Europe and is targeted at guaranteeing adequate financial support for

¹⁵ https://socialinterreg.eu/socinn-2021-2027/

¹⁶ https://www.euscf.eu/about

replicating and scaling demonstrably successful social innovations in service of the five EU Missions¹⁷.

Potential for synergies

Horizon Europe has a medium-high potential for synergies with Interreg. Complementarities arise from the thematic areas covered and can create added value thanks to the research focus of Horizon as well the higher financial endowment and resources that Horizon enjoys respective to Interreg. As a result of these synergies, the Central Europe programme devoted its fourth call to increase the impact of transnational cooperation projects in the regions through the exploitation of existing outputs and results in coordination with other EU instruments, including Horizon. Moreover, this same programme financed the CERUSI project, that not only capitalised on results from previous Central Europe projects (Social(i)Makers and SENTINEL), but also Horizon projects (LiveRuR) on the field of rural entrepreneurship. In this case, the Horizon project designed innovative business models in rural areas that were later included in the RSI academy developed within the CERUSI project. Similarly, I-CARE-SMART, financed by Interreg, aimed to encourage co-creation processes in the field of silver economy, building on the knowledge and experience of the SEED (H2020) project. This evidences how Horizon projects, which have a pure research approach, can be capitalised, and built on by Interreg projects that have a lower technical content and lesser resources to develop innovative solutions, but rather a more implementation-oriented perspective. Therefore, the technical and research outputs by Horizon can be implemented by Interreg projects to address societal needs.

5.3. Erasmus+ and potential for synergies

Erasmus+ is the European Union's programme for the personal and professional development of citizens in the fields of education, training, youth, and sport with a budget of €14.7 billion in the 2014-2020 period, amounting to €28.4 billion for the 2021-2027 period¹⁸. The main objective of the programme is to provide participants with high-quality inclusive education and training to promote active participation in democracy, civil society, and social innovation.

Within the programme, ample space is dedicated to partnerships and alliances for innovation. To stimulate innovation, special attention is given to digital skills, which are becoming increasingly important for all job profiles in the entire labour market. **Alliances for Innovation initiative** from Erasmus+ aims at boosting the provision of new skills and addresses skills mismatches by designing and creating new curricula for higher education (HE) and vocational education and training (VET). This is in line with the encouragement of a sense of initiative and entrepreneurial mindsets in the EU¹⁹.

¹⁷ https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-miss-2022-socialcat-01-01

¹⁸ https://www.eacea.ec.europa.eu/grants/2014-2020/erasmus_en

¹⁹ https://erasmus-plus.ec.europa.eu/programme-guide/part-b/key-action-2/alliances-innovation

Potentials for synergies

Erasmus+ has a medium-high potential for synergies with Interreg, particularly for initiatives dealing with education and skills development. In this sense, it is similar to ESF+ but with a reduced focus on employment and vulnerable groups integration.

Examples

An example of the existing synergies is illustrated by an Interreg Alpine Space project, **DuALPlus**, which was followed up by an Erasmus+ project (FutureSkills4Trainers). The core of the follow-up project is the development of a more comprehensive vocational training course, a proposal that had been developed in the DuALPlus project. This example illustrates that Interreg and Erasmus+ could collaborate on the field of education and skills, which in many cases are related to societal needs or are one of them themselves, and design innovative solutions to address them.

5.4. InvestEU and potential for synergies

InvestEU builds on the Investment Plan for Europe (or 'Juncker Plan') and brings together the European Fund for Strategic Investments and 13 other EU financial instruments. With a budget of over €372 billion in additional investment for the period 2021-27, the programme has as its goal to give an additional boost to sustainable investment, innovation, and job creation in Europe²⁰.

The Invest EU Fund comprehends four main policy objectives: research, innovation, and digitalisation; sustainable infrastructure; SMEs and mid-caps; and social investment and skills – where most of the social innovation is contained. Moreover, this policy objective has been given a special emphasis in the new financing period, with an increase of a 44% of the funds directed to it. It is a part of the strategic policy re-priorisation, as can be remarked in the report high-Level Task Force on Investing in Social Infrastructure as well as in the Commission's plans. Lastly, the InvestEU Advisory Hub provides technical advice for projects seeking financing.

Potentials for synergies

InvestEU possesses a low potential for synergies with Interreg in the field of social innovation. Although one of the priorities includes social investment and skills, these are already targeted to

²⁰ https://euclidnetwork.eu/wp-content/uploads/2021/12/1206-euclid-network-funding-toolkit-v7.pdf

²¹ https://d1wqtxts1xzle7.cloudfront.net/57555736/InvestEUFund-Rubio-Sept18 1-with-cover-page-y2.pdf?Expires=1666173901&Signature=PIEmXE003ZJ5rGqlPuKwVvlqYiXCqvmqP-Xw8NH2CdQJSNw~2hbW2d8VQnbj0HUm7lgYgc5Uk44SDz8yb4BCT97mBCW2z5-BBoGhK11yl8cTSRaSRno01NPWdR0rCxVbp-2RqwPBvbxela6Ksu0L4X2CoRY7PXLnchySq0B9UyR5tQN5464piyo~Us7OMrx9Lsm0hNlx5NHHC22CxVjMNprkcd6ziWomnl4KPwMrqPsHzDtprK0K1GPPb1NTQy0d~Hdc5JjQOYjqix9BsiTOYqQ6-W4-MY5bdCjtWe4OJeDZzTlh2X2JEIMl85TlWFF9r4Y6ae7fvQ8FPPxz9v-ijQ &Key-Pair-Id=APKAJLOHF5GGSLRBV4ZA

a greater extent by other EU instruments (mainly ESF+ and Erasmus+) and it focuses more on sustainable infrastructure and SMEs development.

5.5. Complementarity with Interreg - summary

Based on the analysis of the main EU instruments targeting social innovation, the following table presents an overview of the main characteristics of these instruments to identify the potential synergies between EU instruments and refine the niche for Interreg.

Programme	EU Fund	Beneficiaries	Main policy areas	Potential for synergies with Interreg
Interreg	European Regional Development Fund	Political authorities	Territorial cooperation across the EU	NA
Horizon 2020 & Horizon Europe	Horizon Europe	Scientists, researchers and business	Research and Innovation on: - Health - Culture & Inclusive Society - Civil Security for Society - Digital, Industry & Space - Climate, Energy & Mobility - Natural Resources, Agriculture & Environment	Medium/High
ESF & ESF+	European Social Fund	Individuals and organisations	Employment Education Skills	High
Erasmus & Erasmus+	Erasmus+	Individuals and organisations	Education Youth Sport	Medium/High
InvestEU	InvestEU fund	Organisations	Sustainable infrastructure R&I SMEs Social investment and skills	Low

Table 4: Overview of EU instruments enhancing social innovation.

The table demonstrates the potential for synergies across the current EU instruments promoting social innovation. It is critical for Interreg to build on the existing synergies since these EU funds count with higher financial and infrastructure resources, which can complement and enhance Interreg's performance.

In relation to the **thematic areas**, the analysis identifies areas for synergies between Interreg and other EU funds as well as new areas that are not covered by other EU funds that can be taken up by Interreg. The areas identified involve the following:

- Thematic fields for synergies: in the context of ESF+ and Erasmus+ the highest potential for synergies is in the fields of support to education, labour market and skills; while green transition, climate change, health, food, and agriculture are targeted by Horizon. As these are topics shared across these funds and Interreg, there is a high potential for cross-fun synergies and cooperation.
- New potential thematic fields not covered: the main thematic areas that are not
 extensively covered by these EU funds include smart growth, governance, citizen trust,
 democracy, and migration. Moreover, based on the in-depth analysis conducted through
 interviews, MA also highlighted the relevance to focus on areas such as health and
 tourism, which are key societal challenges in many regions and have a strong link with
 smart growth of territories and regional smart specialisation strategies.

Overall, it can be concluded that a plausible way for Interreg to further promote social innovation in the 2021-2027 period is through collaboration with ESF+, Horizon Europe and Erasmus+. ESF+ is endowed with the largest synergy potential with Interreg, due to approach-wise, thematic, and target-wise similarities; complemented by a higher financial and infrastructure capacity that would benefit Interreg. As a result, synergies could arise on projects fostering employment, skills, education, and vulnerable groups' integration across regions. Horizon Europe research outputs can also be upstreamed to the political level through collaboration with Interreg, which would bring added value to Interreg thanks to the powerful research outputs and resource-endowment of Horizon that Interreg does not have. Similarly, Interreg results can be further developed through Horizon's technical expertise. Collaboration with Horizon should have as the main pivot areas health, climate, energy, mobility, food, and agricultural areas, as they are the main shared topics between both programmes. Finally, in the field of education and skills, Interreg could seek to expand its contributions towards social innovation through cooperation with Erasmus+.

6. Integration of social innovation dimension into regional innovation strategies (S₃)

This section looks at the potential of Interreg in providing tangible outcomes in the field of smart specialisation strategies through social innovation projects. Therefore, the first task was to identify the link between social innovation and S3 to assess how social innovation can promote more tangible outcomes in the context of Interreg projects.

6.1. Identifying the link between social innovation and smart specialisation

6.1.1. Overview of S3 strategies

The EC defines S3 strategies as follows: "Conceived within the reformed Cohesion policy of the European Commission, the S3 approach is characterised by the identification of strategic areas for intervention based both on the analysis of the strengths and potential of the economy and on an Entrepreneurial Discovery Process (EDP) with wide stakeholder involvement. It embraces a broad view of innovation including but certainly not limited to technology-driven approaches, supported by effective monitoring mechanisms"²².

Each smart specialisation strategy is tailored to the concrete member state, region, or local area. However, all S3 share the following features:

Characteristics	Description
Strategic scope	S3 strategies define the challenges and investment areas to focus within the country/region that come along with funding. Nonetheless, it becomes challenging to turn the strategic documents into fully operational tools.
Place-based approach	S3 strategies build on the resources and endowments available in each territory (local, regional, or national) as well as on the concrete socio-economic challenges, in view of determining the suitable development opportunities.
Prioritise investment	Regions face diverse challenges and offer a wide set of investment opportunities. However, Member States and regions have limited financial capacity to invest in all possible areas. As a result, investment is prioritised based on the comparative strengths and growth potential of the investment priorities, also referred to as the Entrepreneurial Discovery Process cycle.

 $^{{\}color{red}^{22}}\ \underline{\text{https://s3platform.jrc.ec.europa.eu/what-we-do}}$

Collaborative approach	Inclusive involvement of all relevant stakeholders around the entrepreneurial discovery, avoiding a top-down process and fostering co-decision and bottom-up process .				
A broad view of innovation	S3 strategies do not only focus on technological innovation but also on practice-based and social innovation to account for the socioeconomic characteristics and challenges of the regions.				
Monitoring and evaluation system	S3 strategies require an effective monitoring and evaluation system that can measure progress in the achievement of the defined objectives as well as any gaps, challenges, or possible deviations to be able to properly react to and address them.				

Table 5: Common features of S3 strategies

6.1.2. Complementarities with Interreg

Common points and complementary areas with social innovation projects under Interreg arise from the main attributes of S3 strategies. Social innovation and S3 strategies share the following common characteristics:

- Involvement of all relevant stakeholders, mainly local actors. Smart specialization strategies are defined by a very inclusive way of proceeding: they aim at including a variety of stakeholders including the public and private sector to ensure that "entrepreneurial discovery" can take place. This involves relying on regional and local actors that provide information regarding the local challenges and opportunities. Similarly, social innovation projects usually engage local actors that enable the identification of the main societal challenges of the region. Therefore, both concepts involve a local multistakeholder approach.
- Focus on the regional needs and competitiveness areas. Smart specialisation works with the means and resources that are available in the concrete socio-economic environment of a locality or a region and identifies the opportunities for improvement, development, and growth in that area with its very own tools and assets. Social innovation has a similar approach: to provide new (innovative) services, products, methods, guidelines, and tested tools to tackle social needs in a specific location. Usually, social innovation projects have a preliminary study phase to identify those needs and see where the innovation can happen. Thus, they both aim at renovating and rethinking old ways of doing through regional endowments to improve a certain service, product, or sector through innovation of what is already there.
- Link with other EU instruments. S3 strategies have been developed within the EU Cohesion policy and as national and regional strategies, benefit from EU funds for their implementation. Similarly, social innovation projects financed by Interreg programmes also have relevant synergies with other EU Cohesion Policy funds such as ESF+. This also applies to the EU instruments with a focus on research such as Horizon 2020 or targeting education such as. Therefore, both concepts benefit from collaboration with diverse EU funding instruments.

Despite the existing synergies and analogies, Interreg programmes and projects have not fully exploited this relationship so far. At the programme level, S3 was not detailed in the 2014-2020 agenda, with a few exceptions (either by programmes focusing on closer links with regional funds for the implementation of S3 priorities or through programme specific objectives addressing the capacity to work with S3). At the project level, most projects did not devote their focus specifically to S3 strategies. Similarly, others did not demonstrate a deep awareness of such strategies since they had focused on other thematic topics crucial for the partnership.

However, many Interreg programmes will include support to S3 strategies in the 2021-2027 period, but the concept appears to be still somewhat broad and indefinite. It does appear as a reference in many programme documents, but then it is exceptional to find it fully implemented at the project level. Additionally, most social innovation projects financed within Interreg are not aware of the local, regional, or national S3 strategies in place. Consequently, there is still much room for improvement in this sense, which gives the new programming period 2021-2027 a key role.

6.2. Key factors that make Interreg a key enabler for S3 through social innovation

6.2.1. Interreg social innovation projects' added value to promote S3 strategies

The strategy and intervention logic behind Interreg has preeminent attributes to improve and provide S3 strategies with more tangible and practical outputs through the financing of social innovation projects. In particular, the main factors that make Interreg a key enabler for S3 strategies have been found to be the following:

- Analogies with S3. Interreg social innovation projects and S3 strategies share the
 regional and local focus with the involvement of all relevant stakeholders, particularly
 local actors. As a result, Interreg social innovation projects share the same geographical
 scope as well as thematic areas as S3 strategies, evidencing the plausibility of promoting
 social innovation solutions developed by Interreg projects within the context of regional
 S3 strategies (contribution to regional excellence).
- Implementation approach. Interreg programmes finance projects that have a specific implementation approach. On the contrary, S3 strategies define general investment and priorities areas but lack the definition of concrete measures, hence, lack the operational plan. As a result, a key challenge S3 strategies face is bringing the strategic documents into implementation. Interreg, through financing social innovation projects, implements initiatives to tackle the existing societal challenges and target the identified needs. Social innovation projects financed by Interreg not only have an implementation approach but have been found to develop tangible outputs including methodologies, training, online tools, and instruments. These outputs become crucial because they expand and survive over the established project time horizon. Consequently, Interreg can enable a shift from the strategic perspective of S3 strategies to an implementation-oriented process, developing tangible outputs.

• Public sector and political authorities' engagement. Social innovation projects financed by Interreg are characterised by their 4-helix approach, which implies the inclusion and collaboration of all relevant local stakeholders, suppliers, delivers and endusers. The public sector and political authorities, overseeing the development of the S3 strategies, are included among the stakeholders. As a result, Interreg has a comparative advantage compared to other instruments, to align the social innovation projects with the existing national, regional and/or local S3 strategies. Furthermore, Interreg projects include the public sector in the design and implementation of projects. This alignment ensures that Interreg social innovation projects target the defined priority or investment areas identified as crucial for regional development and growth.

As a result of the existing analogies regarding the regional scope, role of local actors and synergies with other EU instruments, combined with the complementarities offered by financing concrete projects and involving the public sector, Interreg becomes a powerful instrument to promote the link between social innovation and S3 strategies during the 2021-2027 period. Therefore, Interreg social innovation projects should consider S3 strategies in the design and implementation of the project – to ensure the intervention is aligned with S3– but also S3 projects would benefit from including the social innovation dimension to address existing societal challenges and provide tangible outputs.

6.2.2. Further examples

Despite the limited explicit reference to S3 strategies in social innovation projects in the 2014-2020 period, there are some examples of successful implementation and linkages between both. These examples present potentials, advantages, and possible outcomes of using smart specialization strategies in the field of social innovation that can be used as inspiration.

Interreg efforts to further promote S3 strategies can be found across programmes. For instance, within Interreg Europe, four projects (BRIDGES, COHES3ION, IMRPOVE, RELOS3) were devoted to smart specialisation strategies governance, alignment of sub-regional innovation policies with regional-level ones, implementation of S3 in a local environment and establishing bottom-up approaches. Projects identified and promoted the transfer of good practices summarised in project briefs²³.

On the project level, the GRETA and Osiris projects (co-financed by the Interreg Baltic Sea Region programme) can be highlighted due to the focus on smart specialisation strategies in social and environmental contexts. GRETA project aims at encouraging and strengthening partners' capacities to use smart specialization strategies in the field of green economic growth. They set forward-looking methods, such as a penta helix coordination of stakeholders, involving them in co-creative processes; as well as a quadruple helix inclusion of civil society actors and bottom-up co-creation guided by UN SDGs. Osiris sets the needs of elderly people and the silver economy in the. The project aims to improve the capacity of innovation actors to apply smart specialization approaches for tackling the challenges brought about by the ageing of the region's population. It worked to boost the market uptake and scalation of user-driven technology

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 $^{{\}color{red}^{23}}\,\underline{\text{https://www.interregeurope.eu/sites/default/files/inline/Smart Specialisation Strategy S3 - Policy Brief.pdf}$

innovations. Both projects seek the transformation of society through inclusive strategies of smart specialization.

Even though the link between social innovation and S3 strategies has not been fully exploited yet, there are powerful examples of projects that have deepened this link. An example is the sport and technology clusters in Inno4Sports²⁴ project (Interreg Europe programme). This project focused on Sport Ecosystems which had been recognised as drivers for innovation and growth but remained underdeveloped at the local level. Inno4Sports tackled this issue and increased the representation of potential created by sports innovation within RIS3 and Regional Development Programmes. One of the main goals was to create synergies with Smart Specialisation Processes. This project addressed the changes in the societal role of sports and used them as a vehicle for economic regional growth. The project developed 5 Regional Action Plans to describe the transformations that each region aspires to achieve in its regional policies.

Another example can be found in the InnoHEIs project financed by Interreg Europe, which aimed at widening the role of higher education institutions and their research and innovation infrastructures to participate as facilitators of smart specialisation strategy (S3) and entrepreneurial discovery processes²⁵. The InnoHEIs project's strategic objective was to create a favourable environment to improve the usage and employment of innovation infrastructure through better involvement of its users and enhanced collaboration among scientific, industry and public sectors. Partners would collaborate seeking to improve the higher education institutions and their research and innovation infrastructures performance, responding to the regional needs and demands through co-creation methods, and user-driven, open innovation approaches. Moreover, the InnoHEIS project addressed the challenge of enhancing higher education institution role as enablers of entrepreneurship discovery processes (EDP), taking into consideration S3 strategies.

To sum up, the existing link between social innovation and S3 strategies has been illustrated as well as the added value of Interreg social innovation projects in further accomplishing and implementing S3 strategies with tangible outputs. Nonetheless, this link is not fully developed at the project level yet. Therefore, the 2021-2027 period offers many opportunities to promote the inclusion of social innovation within S3 and further develop complementarities and synergies with other funds. Namely, Interreg programmes include smart specialisation as a fundamental part of the projects to be financed thus encouraging cross-regional cooperation in the identification, development, and implementation of transformative activities through cross-regional synchronized funding schemes. This applies, among others, to social innovation clusters. Additionally, project managers can incorporate the experience and lessons learned from the previous period of 2014-2020 regarding S3 and social innovation.

²⁴ https://keep.eu/projects/18940/Sport-for-Growth-and-Health-EN/

²⁵ https://projects2014-2020.interregeurope.eu/innoheis/

Annex 1: List of abbreviations

EaSI Employment and Social Innovation

ERDF European Regional Development Fund

ESF European Social Fund

EU European Union

FEAD European Aid to the Most Deprived

MA Managing Authority

NEETs "Not in Education, Employment, or Training", refers to a person who is

unemployed and not receiving an education or vocational training

RIS3 Research and Innovation strategy for smart specialization

\$3 Smart Specialisation Strategies

TO Thematic Objective

YEI Youth Employment Initiative

Annex 2: Participant programmes

The following table presents a list of all the Interreg programmes that have been interviewed as part of the study.

Programmes

2014 - 2020 Interreg Europe

2014 - 2020 INTERREG VB Alpine Space

2014 - 2020 INTERREG VB Danube Transnational

2014 - 2020 INTERREG VB North Sea Region

2014 - 2020 INTERREG VB Baltic Sea Region

2014 - 2020 INTERREG VB Central Europe

2014 - 2020 URBACT III

2014 - 2020 INTERREG VB Mediterranean

2014 - 2020 INTERREG VB Atlantic Area

2014 - 2020 INTERREG V-A France - Belgium - The Netherlands - United Kingdom (Les Deux Mers / Two seas / Twee Zeeën)

2014 - 2020 INTERREG V-A France - Italy (ALCOTRA)