

EN

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Answer given by Ms Ferreira  
on behalf of the European Commission  
(20.9.2022)

The European Regional Development Fund (ERDF) may support productive investments in enterprises other than small and medium-sized enterprises (SMEs) in certain cases<sup>1</sup>. For research and innovation activities, productive investments in non-SMEs can be supported as long as the activities involve cooperation with SMEs. In the absence of such cooperation, only small mid-caps (through grants and financial instruments (FI)) or mid-caps (through FI) can be supported. Investments in energy efficiency measures and reduction of greenhouse gas emissions in non-SME enterprises can also be supported through grants or FI. Additionally, any productive investments in small mid-caps and mid-caps can be financed through FI in any ERDF specific objective.

Large enterprises can also receive ERDF or Cohesion Fund support for the implementation of projects other than non-productive investments under the scope of Articles 5 and 6 of Regulation (EU) 2021/1058<sup>2</sup> and in line with the applicable EU and national rules.

To ensure the necessary prerequisites for the effective and efficient use of Union support<sup>3</sup>, the managing authorities (MA) have to justify which forms of support<sup>4</sup> they will use to address market failures and cover the investment needs identified in the programmes<sup>5</sup>. The use of FI<sup>6</sup> is discussed with the relevant stakeholders during the programme negotiation based on clear needs assessment and specific policy objectives. The decision of the MA to contribute programme resources to a FI is based on existing, updated or new ex-ante assessments<sup>7</sup>. In addition, the monitoring committee must examine and approve the methodology and criteria used for selecting operations<sup>8</sup>.

FI are particularly relevant as a policy delivery mechanism in case of revenue-generating and cost-saving projects, e.g. supporting SME development<sup>9</sup>.

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<sup>1</sup> In the cases listed in Article 5(2) Regulation (EU) 2021/1058 (OJ L 231, 30.6.2021, p. 60) as well as in Outermost regions as indicated in Article 14(4) of the same Regulation: 'By derogation, the ERDF may support productive investments in enterprises in the outermost regions, irrespective of the size of those enterprises'.

<sup>2</sup> E.g. investments in public infrastructure or access to services.

<sup>3</sup> Granted by the Funds in accordance with Regulation (EU) 2021/1060 of the European Parliament and of the Council of 24 June 2021 laying down common provisions on the European Regional Development Fund, the European Social Fund Plus, the Cohesion Fund, the Just Transition Fund and the European Maritime, Fisheries and Aquaculture Fund and financial rules for those and for the Asylum, Migration and Integration Fund, the Internal Security Fund and the Instrument for Financial Support for Border Management and Visa Policy, OJ L 231, 30.6.2021, p. 159.

<sup>4</sup> Article 22(3)(b) Regulation (EU) 2021/1060.

<sup>5</sup> Article 22(3)(a) Regulation (EU) 2021/1060.

<sup>6</sup> Article 22(3)(d)(vii) Regulation (EU) 2021/1060.

<sup>7</sup> Article 58(3) Regulation (EU) 2021/1060.

<sup>8</sup> Article 40(2)(a) Regulation (EU) 2021/1060.

<sup>9</sup> Also in these cases appropriate justification of the form of finance is included in the programmes.