

From Partnership to Parenthood?

Regions in the 2028–2034

EU Budget

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Abstract

Europe's next long-term budget promises to be "simpler, faster, stronger." For regional authorities, it may also be tighter, taller, and further away. The Commission's 2028–2034 MFF proposal welds cohesion, agriculture and more into one "mega fund", couples Horizon's collaborative research with a turbocharged Competitiveness Fund, and hardwires lump sums and performance metrics across the board. EURADA welcomes the renewed firepower for innovation and industrial capacity—but warns that the scaffolding looks worryingly top-down. This short paper dissects what that shift means for regions and cities: where governance levers move, where selection criteria bite, and where regional voices risk going mute. It closes with practical asks to keep subsidiarity alive—not as a slogan, but as an operating system for Europe's competitiveness

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1. The Mega Fund (One-Plan-to-Rule-Them-All)

The European Commission's proposal for the 2028–2034 Multiannual Financial Framework (MFF) introduces a consolidated **“mega fund” called “Economic, Social and Territorial Cohesion, Agriculture, Rural and Maritime Prosperity and Security”**, centred on new National and Regional Partnership Plans. These partnership plans bundle cohesion funds (e.g. ERDF, ESF+, Cohesion Fund, JTF) together with related instruments in agriculture, rural development and fisheries into one framework. The Commission claims this will *“strengthen and modernise”* cohesion policy *“with regions at its core”*, upholding *“fundamental principles of partnership, multi-level governance, and place-based action”*. Each Member State (and its regions) would agree on a single plan for tailored investments and reforms, ostensibly ensuring less developed areas continue to catch up and no one is left behind. In line with partnership traditions, these plans are to be *“developed and implemented in partnership with national and regional authorities, in full respect of subsidiarity”*.

Despite this reassuring language, **regional authorities worry the new model recentralises control and adopts a more place-neutral approach.** The possibility to establish regional programmes with a territorial focus, which would be designed and negotiated by regional governments with the European Commission, is seemingly discontinued. The partnership plans might still have so-called 'regional chapters' (though the term 'regional chapters' as such is never mentioned in the regulation), whose management can be delegated to regions, but with a fundamental difference compared to the current set-up. Indeed, it is understood that the main Commission's interlocutor of the Commission regarding the plans remains the national government. Moreover, national governments will enjoy critical management functions, such as the submission of payment claims, by means of a newly created coordinating authority. This would restrict the scope for action for regional managing authorities compared to previous periods and potentially reinforce the influence of national governments on management (for instance, on the selection of projects). This is particularly a problem for the many Member States, including all the largest ones, where regional programmes are currently the norm.

The partnership plans borrow heavily from the *Next Generation EU* Recovery Plan method: funding is tied to results-based milestones/targets and reforms. Indeed, the Commission proposes that payments will be conditional on investment and reform targets – a shift intended to *“deliver funding and results faster and more efficiently”* by focusing on outcomes/results. Both conditionality and result-orientation mechanisms have been already partially introduced in Cohesion Policy, to mixed fortunes, since several years.

Regional stakeholders are in general supportive of an increased mainstreaming of these mechanisms. The problem lies in the approach. If the reform pillar, as it seems for now, will be locking in funds for national and place-neutral policies and the performance-orientation does not take into account regional differences in terms of capacity, the two mechanisms will end up encouraging more centralisation and place-neutral national policies measures as well as reducing the influence of regional managing authorities. It is any case too early to say as the regulation is not entirely clear on these points. Speaking of which: while one of the main rationales behind this reform is to introduce substantial simplification in the management of the funds, there is a risk that this new set-up, because of the necessity to reconcile old and new approaches and challenges in implementing such a gigantic fund, might fuel complexity all the same.

The role and scope of the new **EU-level Facility** embedded in the cohesion mega fund requires also further scrutiny. An *“EU Facility will support implementation at national and regional level”* for measures *“that can be delivered more efficiently at Union level”*, complementing what Member States and regions do on their own. For example, the Facility would take charge of certain tasks like marine conservation (an exclusive EU competence), transnational social infrastructure projects, aspects of inter-regional cooperation, and disaster response, using a central reserve of funds. While this may improve flexibility and unity in crisis response and prevent cohesion funds from being redirected to crisis-response at the expense of their long-term objectives, it also means **Brussels will directly manage a much greater portion of funds. The mechanisms and funding streams, through which the EU facility will operate, are not clarified in the regulation, leaving much ambiguity on its use. It is understood that parts of the funds will be also used for indirect management programmes such as I3s or UAI, but no information is provided, which limits the role of co-legislators in influencing the scope, structure and size of these programmes.**

Contrary to earlier drafts, S3 is not completely absent: the proposal includes it in the list of territorial instruments. Partnership plans shall articulate whether they intend to make use of S3s, alongside other territorial instruments, and through which chapters/funds. This limited mention provides a legal basis for extending the use of S3s and the support of the Commission thereof in the next period. It leaves however uncertainty about how strongly regional innovation priorities—previously anchored by S3—will be incentivised or monitored. It emphasises that cohesion policy will work *“in synergy with other policies”* and deliver *“targeted investments and reforms”* for a more cohesive Europe, but it leaves unspecified how region-specific innovation priorities will be incorporated. This omission creates **uncertainty about the future role of regional innovation strategies.** There is also

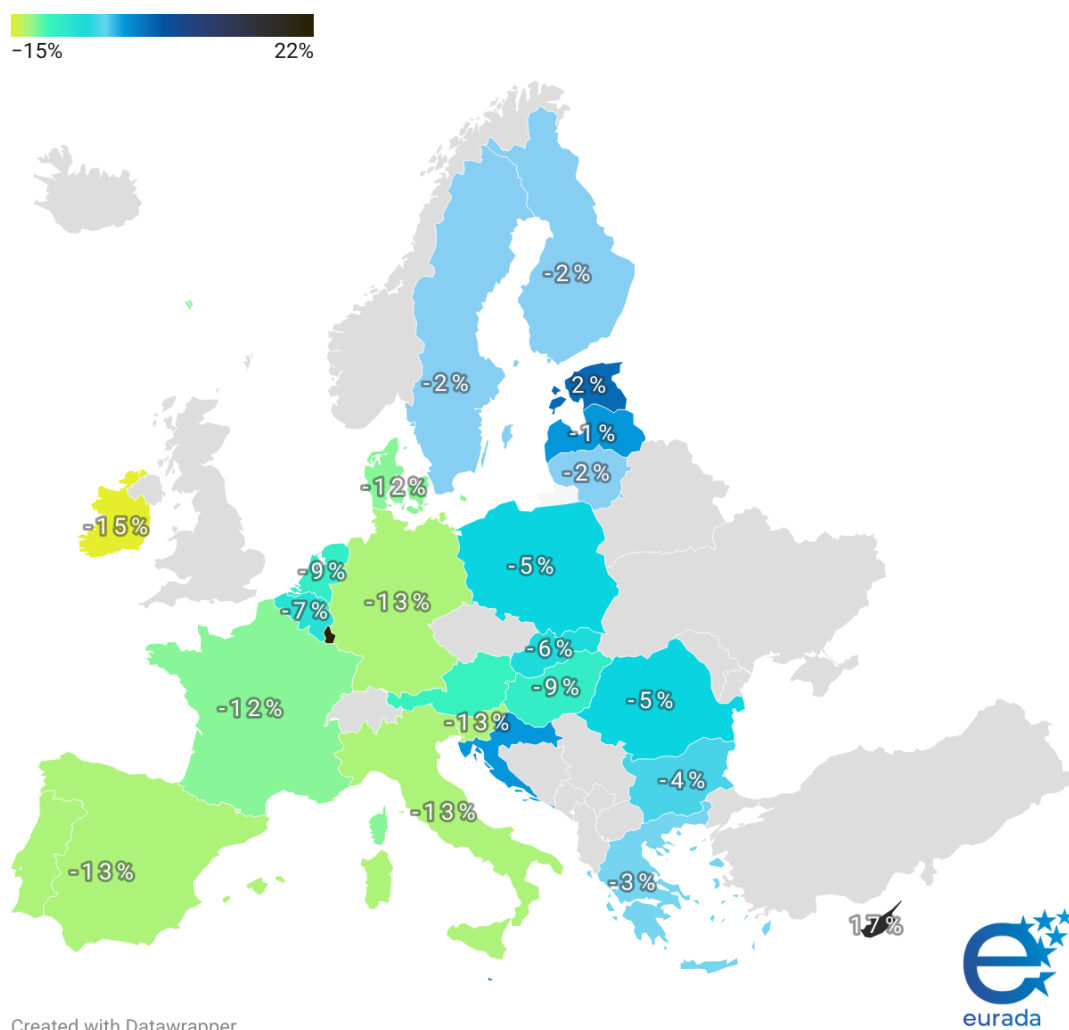
uncertainty about the fate of the Interregional Innovation Investments (I3) instrument. The programme is not mentioned in the regulation. It is understood that it might be established under the EU facility, but there is no information at this stage. This limited treatment can be interpreted as a potential deprioritisation of S3 and I3. If cohesion funding is allocated via national plans without a requirement to anchor projects in regional smart specialisation priorities, there is a risk of a drift toward **place-neutral investment** – favouring projects with high aggregate EU impact but not necessarily balanced regional innovation growth.

Regarding the performance-oriented, the Commission's own review found that the current monitoring system has “over 5,000 heterogeneous and non-aggregable indicators” across EU programs, contributing to heavy administrative burdens. In response, it plans to streamline to around 900 common performance indicators across the budget, **yet not one of them are being capture at regional level**. While simpler monitoring is welcome, focusing on a few aggregate indicators of EU-wide performance may risk overlooking regional nuances, absent clear guidelines and administrative capacity support. The application of performance-based approaches to EU funds has encountered daunting challenges in the past years, including in the context of NGEU. It remains to be seen how the new system will navigate them. **Regional actors worry that what isn't measured won't be prioritised**. In summary, the “mega fund” cohesion framework promises more flexibility and impact through integrated, outcome-driven plans, but it also signals a shift toward centralisation. It is concerning that the traditional subsidiarity ethos could be eroded, despite the Commission's assurances. Without concrete safeguards, some of which are provided but remain to be seen how they will be operationalised, regional authorities may find their role in decision-making diminished. The ambiguous positioning of S3 and I3 under the new setup exemplifies this uncertainty. Going forward, **stronger mechanisms are needed to ensure regional voices remain central**. Without such measures, the post-2027 cohesion policy reform could undermine the very place-based approach it claims to uphold, leaving regions at a crossroads.

To anchor these governance concerns in the distributional reality, the next figure and table report the percentage change in Member State allocations under the mega fund's Partnership Plans compared to the current 2021-2027 period. It is important to approach this comparison very carefully because of the different budgetary architectures and allocation criteria between the two periods, as well as different economic trajectories in Member States. Having said that, the main trend highlighted by the figures points to a decrease in national allocations, especially in cohesion policy's main recipients. Read

alongside the subsequent- table of absolute amounts¹, it shows where seemingly modest percentage shifts translate into very large movements of funding—and where small increases rest on limited bases.

% Change in EU NRPP Budget Allocation by Member State: 2021–2027 vs. 2028–2034



Disclaimer: The structure of the MFF changes fundamentally in the new 2028–2034 framework, highlighting major structural and quantitative shifts. The comparison has been made between two different budgetary architectures, meaning that programme-level comparisons should be approached with care due to organisational reclassifications.

¹ Methodology Summary

To compare the two EU budget frameworks fairly: Budget figures from MFF 2021–2027 were converted into constant June 2025 euros using the EU 27 Harmonised Index of Consumer Prices (HICP). On the other hand, the European Commission published the 2028–2034 MFF proposal with all amounts explicitly stated in 2025 constant prices, enabling direct comparison with the inflation-adjusted data from the earlier period.

Furthermore, EU budget architecture evolves significantly: in 2021–27, funds were allocated via separate instruments (in the estimation were included: CF, JT, ESF+, ERDF, ETC, EAGF, EAFRD, EMFAF, AMIF, BMVI, ISF) whereas in 2028–34, they are grouped under broader headings (e.g. NRPP). Accordingly, original MFF items were reassigned to their equivalent new categories to maintain structural coherence in the comparison

BUDGET ALLOCATION in millions of € (2025 prices)				
Member State	2021/2027	2028/2034	Difference	%
Belgium	8.200 €	7.600 €	-600 €	-7%
Bulgaria	21.318 €	20.400 €	-918 €	-4%
Czechia	32.650 €	28.200 €	-4.450 €	-14%
Denmark	8.424 €	7.400 €	-1.024 €	-12%
Germany	73.666 €	64.300 €	-9.366 €	-13%
Estonia	6.173 €	6.300 €	127 €	2%
Ireland	13.713 €	11.700 €	-2.013 €	-15%
Greece	47.759 €	46.400 €	-1.359 €	-3%
Spain	94.929 €	82.900 €	-12.029 €	-13%
France	96.563 €	84.500 €	-12.063 €	-12%
Croatia	16.080 €	15.900 €	-180 €	-1%
Italy	93.359 €	81.200 €	-12.159 €	-13%
Cyprus	1.968 €	2.300 €	332 €	17%
Latvia	9.089 €	9.000 €	-89 €	-1%
Lithuania	13.919 €	13.700 €	-219 €	-2%
Luxembourg	492 €	600 €	108 €	22%
Hungary	38.808 €	35.500 €	-3.308 €	-9%
Malta	1.266 €	1.300 €	34 €	3%
Netherlands	8.720 €	7.900 €	-820 €	-9%
Austria	11.480 €	10.300 €	-1.180 €	-10%
Poland	120.862 €	114.500 €	-6.362 €	-5%
Portugal	37.170 €	32.500 €	-4.670 €	-13%
Romania	58.817 €	55.600 €	-3.217 €	-5%
Slovenia	5.866 €	5.100 €	-766 €	-13%
Slovakia	19.824 €	18.700 €	-1.124 €	-6%
Finland	9.627 €	9.400 €	-227 €	-2%
Sweden	10.231 €	10.000 €	-231 €	-2%
Total	860.973 €	783.200 €	Weighted mean	-9,4%

In country level terms, allocations remain concentrated: Poland (€114.5 bn) tops the list, followed by France (€84.5 bn), Spain (€82.9 bn), Italy (€81.2 bn) and Germany (€64.3 bn), meaning even modest percentage shifts translate into multibillion changes. By contrast, the few percentage increases occur on small bases (e.g., Luxembourg €0.6 bn; Cyprus €2.3 bn). At aggregate level, our calculation shows that the envelope for programmes grouped under the Partnership Plans falls from €860.973 bn (2021–2027) to €783.200 bn (2028–2034), with a **weighted mean change of –9.4%**. These results are consistent with the European Parliament Research Service brief², which points to **~–10% for CAP income support and fisheries** and **~–11% for the other shared-management strands**.

² [EPRS BRI\(2025\)775885 EN.pdf](#)

2. Horizon Europe revamped future

The Horizon Europe research and innovation programme will continue into 2028–2034 as a “self-standing programme” within the EU budget, but in close coordination with the new Competitiveness Fund. The Commission’s MFF proposal confirms Horizon Europe’s overall mission with double the budget – to fund “*groundbreaking fundamental and collaborative research as well as disruptive innovation in strategic areas*” – and notes that it will remain “excellence-driven” in its approach. Notably, the programme’s structure is adjusted to four pillars: *Excellent Science*, *Competitiveness and Society*, *Innovation*, and *the European Research Area (ERA)*. Pillar II (akin to the current “Global Challenges & Industrial Competitiveness” pillar) appears to be reflected in the “*Competitiveness and Society*” pillar, which will house the collaborative R&I projects tackling societal challenges (health, climate, digital, etc.) and accounts for almost 43% of the programme. This Pillar II is slated to be **tightly coupled with the European Competitiveness Fund**, via “*integrated work programmes for collaborative research and a common rulebook*”. In practice, this means some calls for proposals under Horizon Pillar II may be co-designed alongside the Competitiveness Fund, aligning research topics with downstream deployment funding. Such integration could create a more seamless innovation pipeline from lab to market, but it also blurs the lines between traditionally separate instruments. Regional research actors will need to navigate this new landscape of joint work programmes, which, to some extent, may favour top-down larger, transnational projects over bottom-up innovation in line with EU industrial priorities.

Simplification and performance orientation are key themes for Horizon post-2027. The Commission acknowledges that complexity in EU R&I funding has been an issue, citing burdensome grant management and myriad indicators. In response, it champions measures like the **lump sum funding mechanism**. Already in the current period, several EU programs have piloted lump-sum grants and unit cost reimbursements to simplify administration and reduce error rates. For instance, the Innovation Fund now provides contributions “*almost fully... in the form of lump sums or unit costs for defined outputs*”, rather than reimbursing actual costs. The Commission’s staff analysis concludes that expanding “*the use of lump-sum funding and unit cost options*” (for example, for personnel costs in projects) *could reduce administrative burden*” across programs. We can expect Horizon Europe’s Pillar II to increasingly adopt lump-sum grant models for collaborative projects. **For regional participants, this simplification is a double-edged sword.** On one hand, lump sums can greatly ease the reporting workload for universities and SMEs in less advantaged regions (they no longer need to navigate complex cost eligibility rules – funding is received if project milestones are met). This aligns with the push for “*clearer rules*”

and more transparent procedures for applicants” in the new Horizon Europe. On the other hand, lump sums shift risk to beneficiaries – if project outcomes or milestones are not delivered exactly as agreed, funding might be withheld. Less experienced partners, often from weaker regions, might struggle with this performance-based grant model. To mitigate this, capacity-building and clear guidance will be needed so that the lump-sum scheme truly lowers barriers to entry rather than deterring newcomers.

In tandem, the Commission is introducing a streamlined **performance indicator framework** for all EU funding programs, including R&I. The goal is to focus on results and impact. Currently, as noted, the EU budget uses thousands of KPIs for monitoring, which are often “*non-aggregable*” and impose reporting burdens. Under the new MFF, a core set of ~900 indicators will track progress across all instruments, with an emphasis on outcomes achieved per euro spent. For Horizon Pillar II, this likely means greater tracking of innovation results (patents, technologies deployed, contributions to EU missions, etc.) rather than just counting publications or regional dispersion of funds. There is concern that an overt focus on aggregate performance could inadvertently sideline participants from less-developed regions. If success is measured primarily by high-level outputs (e.g. number of innovations reaching market), evaluators might favour proposals led by strong actors (typically in more advanced regions) with higher success probability, rather than consortia that include capacity-building for less-research-intensive regions. The excellence criterion remains paramount, so without specific safeguards, the longstanding participation gap (where a few countries and top institutions secure the bulk of Horizon funding) may persist or even widen. The **need for robust widening participation measures** and **inclusive processes** in Pillar II is therefore underscored. This could include reinforcing existing measures or introducing new ones: dedicating part of the budget to the “Spreading Excellence and Widening” actions under the ERA pillar, simplifying partner search and mentoring for regions with lower R&D intensity, and ensuring that the integrated Horizon–Competitiveness Fund work programmes still cater to a diversity of regions (for example, via regional innovation ecosystems or mission-oriented calls that require pilots in various locales).

Finally, the **participation processes for regional actors** in Horizon need improvement beyond funding simplification. Regional authorities and development agencies seek a greater voice in shaping Horizon’s strategic orientations (e.g. cluster themes under Pillar II) so that calls reflect a balance between EU-wide objectives and diverse territorial needs. The governance of EU missions has demonstrated the many challenges of involving actors from the ground. The Commission’s citizens’ panel on the EU budget notably recommended “*promotes decentralisation... by tailoring policies to regional needs while ensuring robust*

EU-level control". In the Horizon context, this could mean involving regional innovation stakeholders in agenda-setting for missions or European partnerships and maintaining instruments like *Seal of Excellence* that channel high-quality unfunded Horizon proposals to regional Structural Funds. The Commission has indicated that many citizen recommendations on making the budget more flexible and fairer for all regions were taken on board. It will be important to see this translated into concrete inclusive participation mechanisms in Horizon Europe's next edition. **Without deliberate efforts to engage regions, there is a risk that the new lump-sum, performance-driven Horizon will prevent many regions from increasing their participation many regions** – delivering excellent science and innovation, but not "innovation everywhere." A continued strong "*widening*" component and regional innovation support within Horizon would help to ensure that Europe's R&I excellence is broadly shared, not concentrated.

3. The new kid on the block: European Competitiveness Fund

A flagship innovation in the Commission's MFF 2028–2034 proposal is the creation of a **European Competitiveness Fund** – a bold instrument to boost the EU's industrial and technological base. With a total envelope of roughly **€409 billion (including the Horizon Europe programme)**, this fund represents a consolidation and scaling-up of EU support for research, innovation, industrial development and deployment. It is explicitly designed to *“draw together investment firepower at EU level”* to accelerate strategic projects, effectively **replacing a patchwork of overlapping programmes with one mega-fund under a single rulebook**. By unifying multiple existing tools, the Competitiveness Fund aims to *greatly simplify and accelerate* support, featuring **fast-tracked selection, evaluation and award procedures** and simplified reporting for beneficiaries. In essence, this fund will allow the EU to *“invest where it matters – and to invest with impact”*, targeting high-value projects without the delays and fragmentation of the status quo.

From a **governance** perspective, the Fund will likely be managed by the European Commission (directly or through an executive agency) with implementation support from institutions like the European Investment Bank and national promotional banks. Indeed, the proposal highlights that the Competitiveness Fund will work *“in close cooperation with... the European Investment Bank and other national promotional banks”*. This suggests a blend of direct EU grants and coordinated financial instruments. The fund will deploy a **comprehensive toolkit** – grants, loans, equity investments, procurement, guarantees – choosing the optimal support mode for each project. Crucially, it will leverage the *“proven firepower of Invest EU”* to crowd in private capital, meaning EU budget guarantees will back investments by the EIB and others into priority sectors. The Fund will also back public-private partnerships, *including Important Projects of Common European Interest (IPCEIs)*, which are large-scale cross-border projects in areas like microelectronics or hydrogen.

The **priorities of the European Competitiveness Fund** are explicitly aligned with Europe's long-term strategic autonomy and industrial competitiveness goals. The Commission frames it as focusing on **EU-level public goods** and critical sectors. According to the proposal, the fund will concentrate on *“areas critical for EU competitiveness: clean transition and decarbonisation; digital leadership; resilience and security; defense industry and space; and health, biotech, agriculture and bioeconomy”*. This broad umbrella covers the green tech sector (e.g. renewable energy, batteries, green steel), the digital and AI field, strategic infrastructure and supply chain security, defense capabilities, and key

technologies in health and agrifood. The impetus for these choices comes from high-level strategic reviews – the Commission cites the Draghi report on European competitiveness and the Letta report *“More than a market”* as guiding influences. By channelling resources to these domains, the Fund is intended to drive the EU’s **industrial capacity and economic security** in the face of global competition and geopolitical risks. For example, it will help scale up *“EU-made”* clean tech products via an *Industrial Decarbonisation Accelerator* and support cutting-edge digital infrastructure like AI fabs. It is no coincidence that these priorities mirror those identified under various recent EU initiatives (CHIPS Act for semiconductors, Net-Zero Industry Act for clean tech, etc.). The Competitiveness Fund essentially provides a single financial vehicle to implement Europe’s industrial strategy.

From the perspective of regional development agencies, the **European Competitiveness Fund holds both promise and potential pitfalls**. On one hand, it represents a major new source of investment that could benefit regions hosting or aspiring to develop strategic industries. The fund’s emphasis on projects with high EU added value could spur multi-country collaborations and create hubs of innovation that radiate benefits across multiple territories. Regions strong in sectors like hydrogen, microchips, or biotech may find unprecedented opportunities for EU co-investment. The commitment to *“supporting ‘made in Europe’ technologies, products and services”* and to *“bolster the competitiveness of European companies”* is fundamentally positive for economic development and job creation. Moreover, the fund’s design to be **flexible and fast** – with simplified calls and rapid awards – could help projects get off the ground more quickly than was possible when entrepreneurs had to patch together support from numerous smaller programs.

On the other hand, **accessibility and equity issues are evident**. The Competitiveness Fund’s focus on EU-level impact and its centrally managed nature, as well as emphasis on technologies/industries that are territorially concentrated, may inadvertently sideline many regions. Unlike cohesion funds, which are pre-allocated to ensure every region gets a share, this fund will likely be competitive and merit-based across the Union. Regions that lack large anchor firms or research centres might struggle to put forward winning proposals in cutting-edge fields. If funding gravitates toward Europe’s existing innovation powerhouses, the **gap between leading regions and the rest could widen**. The proposal does promise *advisory services for project promoters*, which could help smaller firms and regions develop bankable projects. It also notes that each *“selected project”* will be matched with the most appropriate support form (grant, loan, equity, etc.), indicating a tailored approach per project. However, **access conditions** remain a question: will there be quotas or balancing criteria to ensure geographic spread? Or will it purely pick the top projects regardless of location? These details will determine whether the Fund boosts *all* of Europe’s industrial

capacity or just a few clusters. It has been suggested that the fund should adopt measures to **include a regional dimension**, for instance by requiring consortia to involve partners from multiple Member States (as IPCEIs do) or by coordinating with cohesion policy instruments (so that supporting infrastructure or workforce development in regions can complement the Fund's high-tech investments).

Finally, the **role of the Competitiveness Fund in boosting EU industrial capacity** is unquestioned – it is the central rationale of the instrument. The Fund will “*provide an unprecedented boost in EU budget support to research, innovation, development and deployment*”, amounting to a combined €450+ billion alongside Horizon Europe and the Innovation Fund. This magnitude of investment, if well-targeted, can genuinely transform Europe's industrial landscape, scaling home-grown innovations and strengthening strategic value chains. It is conceived as the financial backbone of initiatives like the Green Deal Industrial Plan and the quest for open strategic autonomy. It can also address the “*weak translation of research into marketable outcomes*” that Europe has struggled with. The Competitiveness Fund should ensure that more breakthroughs developed in European labs actually scale up to mass production in Europe, rather than overseas.

In implementing this Fund, however, **subsidiarity and regional engagement must not be lost**. The Fund's success will partly depend on how well it cooperates with regional actors who understand local industrial strengths and workforce needs. New EU-level instruments ought to come with **mechanisms to ensure regional engagement in EU strategy delivery** – in this case, delivering the EU's competitiveness strategy. This could mean, for example, involving regional clusters in project consortia, consulting regional authorities in the planning of calls, or aligning Fund investments with regional Smart Specialisation priorities (should those continue in some form). In conclusion, the European Competitiveness Fund is a powerful tool that can **boost EU industrial capacity and innovation leadership**, but it should be deployed in a way that *complements* cohesion goals rather than contradicting them.

By balancing EU-wide objectives with the diversity of regional realities, the post-2027 MFF's new instruments can drive competitiveness while upholding the principle that Europe's strength lies in its regions.

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