

# Implementation of EU policy on circular economy and social inclusion in Poland – opportunities for synergies

Maciej Sabal

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**Abstract:** **Background:** The circular economy (CE) is a concept that is increasingly influencing European Union (EU) policy. Environmental goals are being increasingly financed by European funds. This approach culminates in the new Community Strategy – the European Green Deal. At the same time, EU funds have also been earmarked for social objectives for decades, a fundamental element of cohesion policy. Both CE and social policy measures are implemented with structural funds, through appropriate provisions in national and regional programs. Despite the fact that many activities from both areas are part of sustainable development, Polish strategic programs do not provide for joint activities that affect both environmental and social issues. The article analysed Polish national programs in terms of pro-environmental and social measures. The choice of the research topic is related to the fact that increasingly in the literature there are calls for the inclusion of social issues in the CE theme.

**Research objectives:** The aim of the research is to characterize national programs in Poland dedicated to CE and social welfare in the 2014–2020 perspective (Operational Program Infrastructure and Environment, Operational Program Intelligent Development, Operational Program Knowledge Education Development, Eastern Poland Operational Program, Regional Operational Program for Małopolskie Voivodeship), to identify challenges in narrowing the use of a narrowed understanding of pro-environmental measures, and to propose an approach that takes into account the synergies of the two areas in the context of the 2021–2027 perspective.

**Research design and methods:** The article uses an analysis of EU documents (regulations and directives; structural and investment programs), Polish national and regional programs. A compilation of priority axes from key programs related to CE and social policy in Poland was made, and then a combination of selected areas was proposed.

**Results:** As the analysis shows, the solutions used in the EU and in Poland in the 2014–2020 perspective do not take into account the social context of the circular economy. The plans for the new financial perspective 2021–2027, as well as the long-term strategy of the European Green Deal, do not exclude joint actions, so it is largely up to the member states to focus separately on selected aspects of CE and social inclusion, or to combine actions in both areas. Planning joint activities in at least part of the programs could contribute to the overarching community goal of sustainable development.

**Conclusions:** An interdisciplinary approach to the topic of CE, especially the social aspects, could make EU policy more comprehensive and effective in relation to the identified challenges. The EU, which is one of the leaders of pro-environmental changes in the world, should include a broader approach to both CE issues and social policy.

**Keywords:** circular economy, social inclusion, social policy, European Union, strategy

**JEL Codes:** B55, Q50

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## 1. Introduction

The circular economy (CE) has for at least a decade become one of the key concepts influencing European Union (EU) policy. It is reflected in multi-year strategies, directives, funds, national and regional programs. More and more resources are being allocated to pro-environmental measures, as reflected in the Community financial perspective for 2014–2020, with even more funds earmarked for this area for 2021–2027. CE is part of sustainable growth, i.e. the transformation towards a competitive and low-carbon, resource-efficient economy. Sustainable growth is one of the three priorities of the Strategy for smart, sustainable and inclusive growth – Europe 2020 (European Commission, 2010). The other priorities are smart growth and inclusive growth. As for the latter, it is also an area that has been supported by very large amounts of funding in recent years. Using Poland as an example, it can be seen that both areas, i.e. CE and social inclusion, have been included in most of the priority axes of national and regional programs. At the same time, it can be observed that they have been treated separately, it is very rare that they are combined.

The way of solving the challenges identified in the EU by treating different areas separately and including them in other packages of activities can be justified by the need to show indicators after the implementation of individual programs. At the same time, this approach carries the risk of a narrow view of sustainability. Its achievement is achieved by combining economic development with environmental protection, as well as social justice. At the stage of formulating the EU strategy, activities at various levels of the community are analyzed, and the greatest threats accompanying economic development are diagnosed. Among them are mentioned the exploitation of natural resources, production requiring more and more resources, as well as the growing consumption (Laurent, 2020). However, at the stage of formulation of individual comprehensive approaches give way to separate actions.

The purpose of the paper is to describe national programs in Poland dedicated to CE and social welfare in the 2014–2020 perspective (Operational Program Infrastructure and Environment, Operational Program Intelligent Development, Operational Program Knowledge Education Development, Eastern Poland Operational Program, Regional Operational Program for Małopolskie Voivodeship), and to identify areas where synergies are possible, taking into account measures aimed at improving CE and social inclusion. An opportunity to change the approach in this area is the New Green Deal, which should be considered not as a package of energy and climate actions, but a strategy that sets the transformation of the entire community. Accordingly, CE issues should be included not only in programs related to the economy, but also those related to social policy.

## 2. Literature review

Because of the progressive exploitation of the environment that accompanies economic development, many scientists and politicians have come to the conclusion that it is necessary to transform the economic system in a way that takes into account not only profit, but also sustainability. A discussion on this topic will be prompted by the Club of Rome's report entitled "Limits to Growth" (Meadows et al., 1972). The authors, researchers at the Massachusetts Institute of Technology, wrote the report, which is reminiscent of humanity's warning that there are limits to economic growth. In the late 1970s, the circular economy (CE) concept gained popularity. Since then, a number of definitions have emerged to describe CE, often

with significant differences. It is worth citing the universal understanding described by the Ellen MacArthur Foundation, according to which it is the consideration, as early as the design stage, of repair and remanufacturing and maintaining at all times the highest utility and value of products, components and materials, separating technical and biological cycles (Ellen MacArthur Foundation, 2015). This definition is representative of the CE discussion, as it focuses on technical and economic aspects. The basic problem addressed in the CE discussion is the repetition of a pattern in which resources are turned into products and the latter into waste. The main challenge, therefore, is to counter waste so that as many materials as possible are recirculated (Hobson & Lynch, 2016, pp. 5–25). More and more countries around the world, as well as international organizations (including the EU), are implementing CE demands on the premise that increased resource efficiency through closed material loops will reduce material extraction, waste disposal, and thus pressure on the environment (Ghisellini et al., 2016, pp. 11–32). This is to decouple economic growth from environmental degradation (Kama, 2015, pp. 16–23; Webster, 2013, 542–554). There is current research in this direction, but also legislation in many countries (Mavropoulos & Nilsen, 2020). A very important problem is also the issue of the activities of enterprises that have a problem with the implementation of CE, which is related to the low translation of the assumptions into business operations (Khan et al., 2021). Actions taken by international organizations, as well as individual countries, face difficulties that take place at three levels: policy, organization and individual consumers (Holmes et al., 2021, pp. 55–74). With that said, it can be noted that the perspective of individual consumers is least emphasized.

However, for several years, research and discussion of CE has been accompanied by critical analysis related to the fact that it should be broadened to include a social perspective (Korhonen et al., 2018). More and more researchers believe that a broader view of the concept will allow for systemic change. The circular economy is considered the main goal of economic prosperity, followed by environmental quality, while its impact on social justice and future generations is barely mentioned (Kirchherr et al., 2017). These ideas are expressed to some extent by EU policy, although, as will be shown, in many respects in a way that does not comprehensively address CE.

A separate area in the EU is social policy in the broadest sense, developed practically from the beginning of the Community. Legislation on social cohesion, together with financial instruments, developed since 1957 in the European Union, formed the European Social Model. This model defined integrated economic and social development as part of the European identity (Vaughan-Whitehead, 2015). This model has led to Europe's high-quality public services, access to education and health care. The model has been a source of inspiration for many other countries and regions. It is the basis for stability and social peace, despite temporary crises it is still being developed.

In recent years, CE and social inclusion have become major issues under discussion in the EU, so the primary points of reference in the coming years will be the European Green Deal and the European Pillar of Social Rights. While the former is a reference point for national and regional programs dealing with the economy, the latter relates to social issues. Economic issues have been an area of interest for the EU since its inception, as it was one of the reasons why they began to interact within the community. As for social policy, while this was also an area of interest for the EU from its inception, it was not primary. It can be said that the area of social policy took on a new prominence in the second decade of the 21st century, which can be called a response to the 2008 crisis. In 2015, then-European Commission President Jean-

Claude Juncker announced that the social market economy can only work if there is social dialogue, which suffered during the crisis years (European Commission et al., 2017). In doing so, he referred to the Val Duchesse social dialogue process enacted 30 years earlier, which resulted in the promulgation of policy statements on employment, education and training and other social issues. Following Juncker's announcement of the New Start for Social Dialogue, work began on the European Pillar of Social Rights initiative. This work was completed in 2017, after the document was adopted by the European Commission, the EU Parliament and the EU Council (European Commission, 2017). The pillar took the shape of 20 principles, a signpost to lead toward a fair, inclusive Europe. The pillar is not legally binding, it is a recommendation by the European Commission.

The European Green Deal has a completely different rank in the community. It is not just a package of energy and climate measures, but a comprehensive strategy setting the course for transforming EU policy. It's an initiative announced by European Commission President Ursula von der Leyen in December 2019. The European Green Deal is intended to help transform the EU into a modern, resource-efficient and competitive economy with zero net greenhouse gas emissions by 2050. Additionally, according to the demands of the Deal, there is to be a decoupling of economic growth from resource consumption (European Commission, 2019). The key document in this regard is the so-called European Climate Law, passed on June 30, 2021, which establishes a target – to reduce net greenhouse gas emissions by at least 55% by 2030 compared to 1990 levels (European Parliament & Council of the European Union, 2021a). Taken broadly, it is the European Green Deal that will set the direction of the European community. The Fit for 55, legislative proposals to amend and update EU regulations and introduce new initiatives, in line with climate goals, are under discussion in the EU (European Council, 2022). It is worth considering whether the regulations and laws that will follow Fit for 55 will be narrowed to economic issues, or whether this is an opportunity for a broader treatment of sustainable development, taking into account the social perspective expressed in the European Pillar of Social Rights.

Such a situation may have consequences related to, among other things, a lack of acceptance of the changes being made, especially if they affect a part of the population. That is why it is so important to link CE-related policies with social policies (Häusermann et al., 2022, pp. 462–484). And don't overlook lifestyle changes that may involve environmental policies (Koch, 2022, pp. 447–459). In this context, i.e., the relationship of CE with various aspects of social policy, it is worth reaching for the umbrella concept. This is how it is defined by some researchers (Blomsma & Brennan, 2017, pp. 403–414). The term in question was coined by Paul Hirsch and Daniel Levin, who define an umbrella concept as "a broad concept or idea used loosely to encompass and explain a set of diverse phenomena" (Hirsch & Levin, 1999, pp. 199–212). According to the authors, umbrella concepts create relationships between pre-existing theories and fields that were previously unrelated by focusing on their common quality or characteristic. This concept can also be used to describe the adaptive capacity to manage the environment and respond to the consequences associated with environmental degradation (Klein et al., 2003, pp. 35–45).

The broader view of CE issues observed in recent years, including in conjunction with social issues, seems to be a positive development, primarily in terms of the application aspect. Nevertheless, a certain research gap can be observed regarding the use of EU programs in implementing more comprehensive solutions.

### 3. Research method and material

The study analyzed EU documents, such as regulations and directives; structural and investment programs, as well as Polish national and regional programs. The text tabulates priority axes against key programs related to CE and social policy in Poland. On this basis, common areas were proposed, which are likely to realize the goals of sustainable development. The article also conducts a literature analysis, both of scientific studies and reports and documents prepared on behalf of EU bodies, mainly the Commission and the European Parliament. It also traces the process of EU policy formation in two areas – CE and social inclusion – based on the community's strategies over the past decades.

The article uses a comparative analysis of key nationwide programs implemented in Poland in terms of two areas: CE and social affairs. These are the Operational Program Infrastructure and Environment, Operational Program Intelligent Development and Operational Program Knowledge Education Development. In addition, the specific Eastern Poland Operational Program and a sample regional program – the Regional Operational Program for Małopolskie Voivodeship – were analyzed. The subject of detailed analysis was the priority axes, which on the one hand are formulated ambiguously, and on the other hand, determine the intention of the creators and a kind of “philosophy” of action. A document called Detailed Description of Priority Axes was developed for each EU program. It is these documents that are created in a long process of negotiation between representatives of the European Commission and managing institutions from the member countries (in Poland this is the Ministry of Development and the Provincial Governments). These inconspicuous documents are a key source of knowledge about the intervention directions, which is why they were analyzed.

On this basis, recommendations were formulated, based on the plans of the European Union in the new financial perspective. An important element of the method used is the location of these recommendations in the Polish perspective. This is an interesting case, since a significant number of EU directives are either under discussion or before implementation. Therefore, the article also proposes a model for linking the areas of CE and social inclusion, along with matching the European Green Deal with actions taken in Poland.

### 4. Results

#### *Development of social policy in the European Union*

The importance of social policy in the EU at the time of the founding of the community was low. Although the 1957 Treaty of Rome included as one of the tasks of the European Commission the promotion of close cooperation between member states in the context of the right of association and collective bargaining between employers and employees, the provision referred more to social dialogue than to social policy as understood today (Treaty of Rome, 1957). At that time, the focus was primarily on economic issues, as well as political ones. This was the case for the first two decades of the European Community. The change in approach can be seen mainly at the level of the member states, where issues of social inclusion began to take on broader significance. Social policy issues “moved up” to the main issues in the community in 1985, when French politician Jacques Delors became head of the European Commission. It was the then president of the EC in Val Duchesse (Belgium) in November 1985 that led to a meeting of trade unions, the employers' union and the Commission, which initiated an in-depth discussion of European social policy. The passing of the Single European Act, in February

1986, should be seen as a breakthrough in this regard. This document is considered a breakthrough in the context of the functioning of the entire European Union, as it established the creation of a common European market, but also strengthened political cooperation among member states. It is worth noting that then the Community entered areas that had previously been overlooked, such as social policy, but also environmental protection (Anderson, 1995). As for the legal provisions themselves present in the document, 118a can be considered the most important article, which dealt with protection, safety and health of workers, as well as some changes in the working environment (Single European Act, 1986). The value of this document is that it was followed by other EU directives regulating social issues. As a consequence of the adoption of the Single European Act, one can consider the 1989 Community Charter of Fundamental Social Rights of Workers, a political declaration by the leaders of the community, covering 12 fundamental rights, including social protection, care of the elderly, protection of children and young people, and care of the disabled. The Charter has not taken the form of an official legal document, but it has had a major impact on shaping EU law. The content of the Charter was reflected in the Social Protocol annexed to the Maastricht Treaty of 1992 (Treaty on European Union, 1992). The process of ratification of the Treaty in the various countries of the European Union, which ended in 1993, triggered a discussion on the dimension of Community social policy. This discussion was followed by the development of a Green (1993) and then a White Paper (1994) on European social policy (European Commission, 1993; European Commission, 1994; Grimes, 1994). The first document announced changes in European social policy, the second was a program of Community social policy, which addressed future policy issues and emphasized the need for harmonious development of social policy, socio-economic cohesion and included a diagnosis of the social situation in the EU area.

The Amsterdam Treaty of 1997 treated social rights more formally, including by enshrining the Union's main social objectives, among which were to ensure adequate social protection, combat the isolation of socially disadvantaged groups, develop employment and combat unemployment (Treaty of Amsterdam, 1997). These principles were reaffirmed in the Treaty on the Functioning of the European Union, known as the Lisbon Treaty. The chapter titled "Social Policy" stipulated that the Union's bodies and the member states aim to promote employment, improve living and working conditions so that they can be equalized while maintaining progress, but also social protection (Treaty on the Functioning of the European Union, 2007). In addition, the Treaty was accompanied by an updated Charter of Fundamental Rights of the European Union, which introduced provisions on equality between men and women in all areas, including in matters of employment, labour and wages, granted rights to the elderly and people with disabilities (Charter of Fundamental Rights..., 2000). To enforce the described provisions, the European Parliament and the EU Council were obliged to issue directives in this regard. The member state, on the other hand, was obliged to create appropriate conditions by issuing legal acts guaranteeing the demands of the Treaty and the Charter.

It can be said that the culmination of the road the EU has travelled in the direction of protecting social rights is the aforementioned European Pillar of Social Rights. Parallel to the legal acts, concepts aimed at realizing the objectives were incorporated through financial instruments. These came mostly from the European Social Fund (ESF). The Fund itself was established as early as 1957, on the basis of the EEC Treaty; it was the first structural fund of the Community. Initially, the Fund's main objective was to promote employment and provide opportunities for the development of workers. This approach persisted through the first decades of the Community's operation, due to the fact that the EEC was established for political and economic

integration, other areas, including social issues, were in the background. This approach can also be explained by the fact that the 6 countries that made up the EEC were characterized by relatively good social security for citizens. Until 1970, the fund reimbursed vocational training and resettlement allowances for workers affected by economic restructuring. Since 1971, the Fund's resources have been significantly increased, and since the 1980s, the Fund's activities have been oriented toward combating youth unemployment and supporting the regions most in need of assistance.

The Single European Act laid the groundwork for comprehensive reform by introducing a coordinated approach to ESF programming. The Maastricht Treaty broadened the scope of ESF support to include issues related to adaptation to changes in industry and production systems. In the past 2014–2020 perspective, the ESF focused on promoting sustainable and quality employment and supporting labour mobility; supporting social inclusion and combating poverty and discrimination; investing in education, training and vocational training for skills acquisition and lifelong learning; and strengthening the institutional capacity of public authorities and stakeholders and the efficiency of public administration. The budget for the period was 75 EUR billion (European Parliament, 2021). The renewed ESF+ Fund for 2021–2027 will have a record 99.3 EUR billion at its disposal (European Commission, 2022a).

### ***CE in the European Union***

As far as policies related to environmental protection in the broadest sense are concerned, this topic appeared relatively late in the Community. Admittedly, the provisions on this subject already appeared in the Treaty of Rome, which drew attention to the pursuit of “a high level of protection and improvement of the quality of the environment”, but they were so general that it must be considered that they remained at the stage of postulates (Treaty of Rome, 1957). It was only as a result of the first United Nations conference on the environment that the European Council in 1972 indicated the need to develop an environmental policy linked to economic development. However, this was only a declaration. The Single European Act of 1986 introduced the title “Environment”, which provided the legal basis for a common environmental policy. The Maastricht Treaty recognized the environment as one of the EU's policies. The Treaty of Amsterdam, meanwhile, indicated that all EU sectoral policies would include an obligation to protect the environment. This issue, defined as combating climate change, was promoted to the top EU goals in the Lisbon Treaty (Treaty on the Functioning of the European Union, 2007). The EU's approach to environmental protection has evolved over time and can be characterized as an effort to prevent and clean up pollution at the source, with enforcement of polluter responsibility, including companies. Operators engaged in activities that generate pollution and environmentally hazardous substances are obliged to take preventive measures and remedy any damage. An expression of this approach was the communication “Closing the loop – an EU action plan for a circular economy” issued by the European Commission in 2015. The document enshrined a package of actions that were to contribute to maximizing value and ensuring the use of all raw materials, products and waste, while contributing to energy savings and reducing greenhouse gas emissions. These actions were to cover the entire life cycle: from production and consumption to waste management and the market for secondary raw materials. It also set an EU target of recycling municipal waste at 65% by 2030, recycling of packaging waste at 75% by 2030, and reducing landfill to a maximum of 10% by 2030. The goals described in “Closing the loop” proved to be too unambitious for the European Commission, and in March 2020 it issued the Communication “The EU's new circular action plan paves



the way for a cleaner and more competitive Europe” one of the main elements of the European Green Deal.

Funding for pro-environmental measures in the EU dates back to the mid-1970s, when the European Regional Development Fund (ERDF) began operating. Although the Fund itself was established mainly for the purpose of sustainable economic development throughout the community, in the late 1980s and early 1990s, pro-environmental measures began to be financed from this pot (European Council, 1988). This happened as a result of the 1988 reform of regional policy and structural funds. Today, this scope of the fund’s influence is expressed explicitly in EU law (European Parliament & Council of the European Union, 2021b). Another fund with resources for pro-environmental measures is the Cohesion Fund (CF), established in 1992, which is linked to the establishment of Economic and Monetary Union. This temporary instrument was intended to reduce economic and social disparities and promote sustainable development (Council of the European Communities, 1993). It’s a fund intended only for countries with gross national income per capita below 90% of the EU average. The Cohesion Fund was intended to support two areas: the environment and transport infrastructure. This ties in with the concept of sustainable development, so that economic growth in the weakest member states does not come at the expense of environmental degradation and reduced quality of life. The fund was originally intended to last until 1999, but is still in operation today.

In addition, pro-environmental measures are supported by the European Agricultural Fund for Rural Development (EAFRD), established as a result of the reform of the Common Agricultural Policy completed in 2005. Among other things, the fund is intended to contribute to sustainable development by encouraging, in particular, farmers and forest holders to adopt land use methods compatible with the need to preserve the landscape and the environment and to protect and improve natural resources (European Commission, 2021a). Funds provided for activities aimed at maintaining environmental sustainability are also provided under the European Maritime and Fisheries Fund (EMFF), under other names operating since 1993 (European Commission, 2021b).

### ***Structural and investment funds***

The funds described: European Social Fund+, European Regional Development Fund, Cohesion Fund, European Agricultural Fund for Rural Development, and European Maritime and Fisheries Fund make up the EU’s structural and investment funds. The European Commission and member countries manage them. They focus on 5 areas: research and innovation, digital technologies, supporting a low-carbon economy, sustainable management of natural resources, and small businesses (European Commission, 2021c).

In addition to the main funds in the EU, there are other financial instruments that support various areas in the Community, including the European Union Solidarity Fund and the Fund for a Just Transition. These instruments are adapted to the economic and social situation. In addition, mention must also be made of programs that do not come directly from any of the funds, including the Horizon Europe Program, the LIFE Program and the Erasmus+ Program. The main axis of the European Union’s policy, set out in the Europe 2020 Strategy, was:

- Cohesion Policy: European Social Fund+, European Regional Development Fund, Cohesion Fund;
- Common Agricultural Policy: the European Agricultural Fund for Rural Development;
- Common Fisheries Policy: European Maritime and Fisheries Fund.



The Community strategy that, next to agricultural policy, is the most important and cost-intensive area of the EU is cohesion policy. It is in this area that activities related to social assistance as well as pro-environmental measures fall. As defined in the Single European Act of 1986, cohesion policy is designed to “reduce disparities between regions and counteract the backwardness of disadvantaged regions” (Single European Act, 1986). Between 2014 and 2020, cohesion policy is scheduled to account for about 32.5% of the total EU budget, or EUR 350 billion.

The Europe 2020 Strategy identifies 3 priorities:

- smart growth, or growth based on knowledge and innovation;
- sustainable growth, i.e. transformation towards a competitive and low-carbon, resource-efficient economy;
- inclusive growth, i.e. supporting an economy with a high level of employment and ensuring economic, social and territorial cohesion (European Commission, 2010).

To achieve these priorities, the European Commission has set 5 overarching, measurable EU targets:

- the employment rate of people aged 20–64 should be 75% (Target 1);
- 3% of the Union’s GDP should be invested in research and development (target 2);
- 20% of energy production should come from renewable sources, a 20% increase in energy efficiency, a 20% reduction in greenhouse gas emissions from 1990 levels (Target 3);
- the number of school dropouts should be reduced to 10%, and at least
- 40% or more of the younger generation should pursue higher education (Target 4);
- the number of people at risk of poverty should be reduced by 20 million (Target 5).

The passing perspective of the European Union proves that funds from the three main funds that make up cohesion policy are channelled into activities that are precisely dedicated to specific problems. The Commission’s goals can be divided into pro-environmental (goals 2, 3) and social (goals 1, 4 and 5).

The Europe 2020 strategy clearly indicates that it is the pro-environmental and social areas that are key in the Community. These goals have been pursued by placing relevant activities in national programs, financed by structural and investment funds. The example of Poland shows that the two spheres are treated separately.

### ***Polish operational programs***

This distinctiveness can be clearly seen in the main Polish national operational programs in the 2014–2020 perspective: Operational Program Infrastructure and Environment, Operational Program Intelligent Development, Operational Program Knowledge Education Development, Operational Program Digital Poland, Operational Program Eastern Poland and Technical Assistance. The programs are divided into priority axes, which relate to specific areas that require support. The tables 1–5 show the programs by individual axes, along with an indication of the area: circular economy (CE) and social inclusion (SI). There are 16 regional programs, much of it very similar to each other. For example, the program for the Małopolska region is presented.

**Table 1. Priority axes of the Operational Program Infrastructure and Environment**

Operational Program Infrastructure and Environment	CE	SI
Axis 1. Reducing the carbon intensity of the economy	✓	–
Axis 2. Environmental protection, including adaptation to climate change	✓	–
Axis 3. Development of the TEN-T road network and multimodal transport	✓	–

Operational Program Infrastructure and Environment	CE	SI
Axis 4. Road infrastructure for cities	✓	✓
Axis 5. Development of railroad transport in Poland	✓	–
Axis 6. Development of low-carbon public transport in cities	✓	–
Axis 7. Improving energy security	✓	–
Axis 8. Protection of cultural heritage and development of cultural resources	–	–
Axis 9. Strengthening strategic health care infrastructure	–	–
Axis 10. Technical assistance	–	–
Axis 11. REACT-EU	–	–
Axis 12. REACT-EU technical assistance	–	–

Source: own elaboration.

**Table 2. Priority axes of the Operational Program Intelligent Development**

Operational Program Intelligent Development	CE	SI
Axis 1. Support for conducting R&D work by enterprises	–	–
Axis 2. Support for the environment and the potential of enterprises to conduct R&D&I activities	–	–
Axis 3. Support for innovation in enterprises	✓	–
Axis 4. Increasing scientific and research potential	–	–
Axis 5. Technical assistance	–	–

Source: own elaboration.

**Table 3. Priority axes of the Operational Program Knowledge Education Development**

Operational Program Knowledge Education Development	CE	SI
Axis 1. Labor market open to all	–	✓
Axis 2. Effective public policies for the labor market, economy and education	–	✓
Axis 3. Higher education for economy and development	–	–
Axis 4. Social innovation and transnational cooperation	–	✓
Axis 5. Support for the health area	–	✓
Axis 6. Technical assistance	–	–
Axis 7. REACT-EU support for the health area	–	✓
Axis 8. REACT-EU technical assistance	–	–

Source: own elaboration.

**Table 4. Priority axes of the Eastern Poland Operational Program**

Eastern Poland Operational Program	CE	SI
Axis 1. Entrepreneurial Eastern Poland	–	–
Axis 2. Modern transport infrastructure	✓	–
Axis 3. Supra-regional railroad infrastructure	✓	–
Axis 4. Technical Assistance	–	–

Source: own elaboration.

**Table 5. Priority axes of the Regional Operational Program for Małopolskie Voivodeship**

Regional Operational Program for Małopolskie Voivodeship	CE	SI
Axis 1. Knowledge economy	–	–
Axis 2. Digital Małopolska	–	–
Axis 3. Entrepreneurial Małopolska	–	–
Axis 4. Regional Energy Policy	✓	–
Axis 5. Environmental protection	✓	–
Axis 6. Regional Heritage	–	–
Axis 7. Transport infrastructure	–	–
Axis 8. Labor market	–	✓
Axis 9. Socially cohesive region	–	✓
Axis 10. Knowledge and competencies	–	✓
Axis 11. Revitalization of regional space	✓	–
Axis 12. Social infrastructure	–	✓
Axis 13. Technical assistance	–	–

Source: own elaboration.

## 5. Discussion

New signposts in the EU, namely the European Green Deal and the European Pillar of Social Rights, which translate into new programs, may be an opportunity to break down this separation of areas. Above all, the Fair Transition Mechanism can play an important role.

The 2021–2027 Cohesion Policy is to be implemented primarily through the European Regional Development Fund, the Cohesion Fund and the European Social Fund+. In addition, these funds are to be supplemented by the Fair Transition Fund, which is part of the European Green Deal. The Fund is a new financial instrument within the framework of the Cohesion Policy to provide support to areas facing serious socio-economic challenges resulting from the transition in the pursuit of climate neutrality (European Parliament & Council of the European Union, 2021c).

The transfer of these funds will take place within the framework of the aforementioned Just Transition Mechanism. According to the plan, the mechanism is expected to support the regions most affected by the negative socioeconomic effects of the transformation with about 55 billion euros over the period 2021–2027 and mitigate these effects. The fund is expected to benefit residents of the regions most affected by the transition, including through greater opportunities in terms of employment in new and transitioning sectors, opportunities for retraining, or investment in combating energy poverty. Businesses under the mechanism are to be supported in their transition to low-carbon technologies and economic diversification based on climate-resilient investments and jobs. For member states, the fund envisions supporting the transition to low-carbon and climate-resilient activities, creating new jobs in the green economy or investing in public, sustainable transport (Flisowska, Moore, 2019). The vast majority of the funds are to accrue to countries facing still high use of fossil energy, such as Poland, Germany, the Czech Republic, Bulgaria, Romania, Slovenia and Croatia.

The proposed solutions under the Equitable Transformation Fund are the first example in the European Union in which areas of support from two fields, CE and social policy, have been combined. The activities proposed in the fund are an CE example of synergy that approaches the problem holistically. The fund is part of the EU's extraordinary Next Generation EU, which is designed to help rebuild the EU after the COVID-19 pandemic and support investment in green and digital transformation. However, funds from the Fair Transformation Fund are a small slice of Next Generation EU. The bulk of the funds will be distributed under the Recovery and Resilience Facility. Financed in the form of loans and grants, the Facility is the basis for national reconstruction plans developed by member states. It is worth noting that both the Facility and the reconstruction plans were structured in a way that treats CE and social policy issues separately, so the Just Transition Fund can be seen as an exception in this regard. Especially since the cohesion policy for 2021–2027 in Poland and the rest of the EU is to be implemented for the most part through “traditional” national funds and regional operational programs, which will resemble in structure those of 2007–2013 and 2014–2020. While this is a convenient solution from the point of view of the distribution of funds and the implementation of indicators, the treatment of key areas that are subject to EU intervention separately may hinder the implementation of the main strategic objectives of the Community. The scale of the distribution of funds for Poland for 2021–2027, taking into account the sources of financing, is shown in the Table 6. The statement does not include funds from React EU and the Common Agricultural Policy.

**Table 6. EU funds for Poland 2021–2027**

Source	Next Generation EU		Multiannual Financial Framework
Fund	The Recovery and Resilience Facility	Just Transition Fund*	Structural and Investment Funds* ESF+, ERDF, CF, EMFF
Amount in billion euros	35.4	3.5	72.5

\* Funds allocated to cohesion policy

Source: own elaboration, European Commission, 2022b; European Commission, 2022c.

The EU's most important strategy is the European Green Deal, which aims to transform Europe as a climate-neutral place by 2050. Optimally, all sources of funding (Next Generation EU and the Multiannual Financial Framework) should be subordinated to this goal. In the meantime, the European Commission indicates precisely which funds and to what extent it is to finance European Green Deal activities: EU countries must allocate at least 37% of the funding from the Instrument for Reconstruction and Enhanced Resilience, at least 30% of the funds they receive from the ERDF and 37% of the funds from the CF (European Commission, 2022d). The Commission does not require member states to fund climate action with ESF+ funds. Funding for the European Green Deal is at a record high, so naming ESF+ as another source of funding would not matter in terms of the scale of support, but it would be important in terms of synergies, i.e. linking environmental and social goals. Meanwhile, such a connection applied in the case of the Just Transition Fund, a small scale in relation to the total funds for the coming years. In the case of the European Pillar of Social Rights, the extent to which activities in this area should be financed by individual funds has not been indicated in detail, but they will mainly come from ESF+. No environmentally sensitive activities are envisaged in this area. Because of

the importance of the European Green Deal to the Community Strategy, a solution in which it is envisaged to finance part of the environmental tasks from ESF+ should be considered optimal.

**Table 7. Strategic areas of the main sources of funding for EU policies in 2021–2027**

Source	Next Generation EU		Multiannual Financial Framework
Fund	The Recovery and Resilience Facility	Just Transition Fund*	Structural and Investment Funds* ESF+, ERDF, CF, EMFF
Strategic areas	I. Green transition II. Digital transformation III. Economic cohesion, productivity and competitiveness IV. Social and territorial cohesion V. Health, economic, social and institutional resilience VI. Policies for the next generation	I. Alleviate the impact of the transition by financing the diversification and modernisation of the local economy II. Mitigating the negative repercussions on employment	I. Single market, innovation and digital II. Cohesion, resilience and values III. Natural resources and the environment IV. Migration and border control V. Security and defence VI. Neighbourhood and the world VII. European public administration

Source: own elaboration, European Commission 2022e; European Parliament & Council of the European Union 2021c; European Parliament, 2022.

At the level of the main goals and pillars, shown in Table 7, it is not excluded that CE and social policy issues can be combined in some areas. As mentioned, in the case of the Equitable Transformation Fund, this is indicated explicitly. As for cohesion policy, the examples from 2014–2020 shown in Tables 1–5 indicate that CE and social inclusion areas are treated separately. In the case of the Equitable Transformation Fund, much depends on national reconstruction plans, in which there is a certain amount of discretion when it comes to writing down activities. It is in the individual member states that a discussion should take place on the appropriateness of combining the areas described both in terms of cohesion and reconstruction policy. The strategic framework that has been prepared at the level of the entire Community provides the opportunity to do this. In documents such as the Lisbon Strategy or the New Green Deal, economic and social issues are treated together, holistic solutions are proposed. At a lower level, i.e. in the planning of national and regional programs, these issues go into separate activities. In this way, CE and social policy issues very rarely “meet” with each other.

Meanwhile, it is possible to find such problems occurring at the community level that could be addressed more comprehensively. Using the example of the Polish Program European Funds for Infrastructure, Climate, Environment 2021–2027 (Ministry of Funds and Regional Policy, 2022), approved in October 2022, and the preliminary draft of the Program European Funds for Social Development 2021–2027 (Office of the Prime Minister, 2022), suggestions for the possibility of linking specific goals are presented. It should be noted that the latter program is currently in the working phase, so individual objectives are subject to change. Importantly, in the case of the European Funds for Infrastructure, Climate, Environment 2021–2027 program, it is indicated which priority axis will be financed by the ERDF and which by the CF. In the case of the European Funds for Social Development 2021–2027 program, all of it will be financed by ESF+. In addition, an attempt was made to match these proposals with the activities described in the annex Action Plan to the European Green Deal Communication (European Commission, 2022f). The proposed combination of activities was presented using the example of funds from the Multiannual Financial Framework. However, with Next Generation EU funds, joint initiatives

**Table 8. Proposal to combine the areas of CE and social inclusion along with matching the European Green Deal with action**

Specific Objectives – European Funds Program for Infrastructure, Climate, Environment	Proposal for linkage to the Program European Funds for Social Development 2021–2027	European Green Deal – proposal for linking to activities
Priority II – Support of Energy and Environment Sectors from the ERDF. Specific objective: to promote energy efficiency and reduce greenhouse gas emissions.	Priority I – Better policies for social development. Specific objective: to support the social integration of people at risk of poverty or social exclusion, including those most in need and children.	Climate ambition.
Priority II – Support of Energy and Environment Sectors from the ERDF. Specific objective: to promote renewable energy in accordance with Directive (EU) 2018/2001, including the sustainability criteria set forth therein.	Priority VI – Social innovation Specific objective: Macro-innovation.	Clean, affordable and secure energy.
Priority III Urban Transport Specific objective: To promote sustainable multimodal urban mobility as part of the transformation towards a zero-emission economy.	Priority I – Better policies for social development. Specific objective: to support active social inclusion in order to promote equal opportunities, non-discrimination and active participation, and to increase employment opportunities, especially for disadvantaged groups.	Sustainable and smart mobility.
Priority VI: Health Specific objective: Ensure equitable access to health care and support the resilience of health care systems, including primary health care, and support the transition from institutional to family and community-based care.	Priority IV – Health and long-term health care Specific objective: to support the adaptation of workers, businesses and entrepreneurs to change, to promote active and healthy aging and a healthy and well-adapted work environment that takes into account health risks.	Greening the Common Agricultural Policy.
Priority VII – Culture. Specific objective: Strengthen the role of culture and sustainable tourism in economic development, social inclusion and social innovation.	Priority VI – Social Innovations. Specific objective: macro- innovations; micro- innovations.	Preserving and protecting biodiversity.
Priority V – Support for the transport sector from the ERDF. Specific objective: To develop and improve sustainable, climate-resilient, intelligent and intermodal mobility at national, regional and local levels, including improved access to TEN-T and trans-border mobility.	Priority I – Better policies for social development. Specific objective: to support the social integration of people at risk of poverty or social exclusion, including those most in need and children.	Sustainable and smart mobility.

Source: own elaboration.

are also possible. The summary presented in Table 8 is the author's proposal indicating areas of potential synergy between CE and social policy, based on documents developed by the Polish government and the European Commission.

Both the gradual introduction of CE objectives and the spread of social inclusion in the EU, as presented in the article, are linked to the evolution of Community policies towards greater intervention by states in these two strategic areas. They have become, perhaps unevenly, the most important guideposts for the coming years. It can be said, according to Karl Polanyi's concept, that both areas fulfil the social purpose of the economy. This is achieved through statist state intervention. Both areas, CE and social inclusion, are clearly subordinated to national regulation, as well as at the level of the European community. The term embeddedness, proposed by a Hungarian scholar, seems key to describing this condition. Polanyi emphasizes the role of institutional regulation, binding markets to societies (Polanyi, 1944). The economy is subordinated to social relations and relies on the principle of reciprocity, exchange between different parties. Meanwhile, contemporary scientific discourse rarely incorporates social aspects into the concept of CE, focusing instead on the environmental and economic dimensions (Geissdoerfer, 2017). It can be said that social embeddedness is relatively rarely referred to in the study of the economy, and economists rarely refer to the Hungarian researcher's concepts. Polanyi's thought is more often cited by sociologists and political scientists (Cangiani, 2011). Social references are equally rare in relation to CE. For several years, there have been calls for the inclusion of social aspects in the CE debate, so that approaches to environmental issues should be more complex and complete (Blomsma & Brennan, 2017). J. Kirchherr, D. Reike and M. Hekkert, who analysed more than 100 definitions of CE, found a small share of terms referring to broad social issues (Kirchherr et al., 2017).

CE is a concept that is still evolving and requires new boundaries to be drawn when it comes to spheres of influence (Merli et al., 2018). Social issues arise in the broad concept of sustainability, but they are more about the human impact on the environment and the intergenerational distribution of resources (Sauve et al., 2016). Meanwhile, at the level of EU strategic documents, such as the Next Generation EU and the Multiannual Financial Framework, a number of pillars are envisioned that could expand the CE category to include other social areas. At the strategic level (Table 8), areas have been enshrined that can be treated broadly, i.e. including both perspectives. These include, for example, economic cohesion, productivity and competitiveness; policies for the next generation; mitigating the effects of transition by financing the diversification and modernization of the local economy or mitigating negative effects on employment. In this context, it is worth referring again to the measurable goals indicated in the Europe 2020 strategy, in the context of the new perspective. These are, first and foremost, Goal 2, concerning investment in research and development, Goal 3 related to renewable energy production, and Goal 5 relating to reducing the percentage of socially excluded people. A skilful selection of priorities and goals in the new financial perspective, assuming synergy of CE and AI activities, would be a soulful opportunity to push through even more ambitious indicators. This would require new initiatives, such as linking education to pro-environmental issues, creating programs to support employment in the CE-related sector, or fighting energy poverty more effectively. However, the example of translating the strategy into operational programs in Poland for 2014–2020 (Tables 1–5) shows that combining these areas is rare.



## 6. Conclusions

The issues described in the article relate to two key strategic areas in the EU: CE and social inclusion. Although the latter area has been present in Community policy for decades, and resources allocated to social objectives continue to increase, CE issues will dominate the EU for years to come. This is evidenced by the prominence of the European Green Deal. This is why it would be optimal to integrate social issues into pro-environmental measures in the EU.

The evolution of the EU's approach to environment and social inclusion, analysed in the article, indicate that the Community is responding quickly to current political, social and economic challenges. Right now, at the threshold of the beginning of the new financial perspective, but also at the moment of the greatest challenges in climate protection and energy policy, the EU can apply pioneering solutions to the inclusion of social issues in the construction of the CE model. However, this requires appropriate transformation of provisions from the strategic to the operational level. Even if some of the cohesion policy programs are ready, there is still a chance to modify other instruments, including those from the Next Generation EU.

The example of Poland proves that supporting areas related to CE and social inclusion separately is a more convenient solution from the point of view of implementation of indicators. A breakthrough of sorts could be the implementation of goals related to the Fund for Equitable Transformation, everything depends on the operational provisions prepared by member countries. Nothing prevents all operational programs from treating these areas together, which may translate into a more complete realization of the set goals.

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### About Author/s

**Maciej Sabal**, PhD

Department of Non-Ferrous Metals  
AGH University of Science and Technology  
al. Mickiewicza 30, 30-059 Kraków, Poland  
e-mail: [sabal@agh.edu.pl](mailto:sabal@agh.edu.pl)  
ORCID: 0000-0002-5816-9058  
\* Corresponding author.

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### Conflict of Interest

The author declare that the research was conducted without any commercial or financial relationships that could be construed as a potential conflict of interest.

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