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Proposal for a

REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

on digitalising the coordination of social security systems, laying down a framework for the European Social Security Pass (ESSPASS) and amending Regulations (EC) No 883/2004, (EC) No 987/2009 and (EU) No 2018/1724

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(Text with EEA relevance)

EXPLANATORY MEMORANDUM

1. CONTEXT OF THE PROPOSAL

• Reasons for and objectives of the proposal

The **free movement of persons** is one of the four fundamental freedoms **at the heart of the EU single market** and a **major achievement of European integration**. By facilitating labour mobility, it helps address labour and skills shortages and supports economic growth and competitiveness across Member States. Beyond its benefits for Europe's economy, the free movement of persons expands professional and personal opportunities for individuals, encourages cultural exchange and a shared sense of community, thereby advancing the integration of the European Union.

The effective exercise of this freedom requires clear rules, robust enforcement mechanisms and coordinated policies among Member States to support mobility while guaranteeing fairness, legal certainty and the protection of rights. A key pillar in this regard is the **EU social security coordination framework**[1]. This ensures that **individuals continue to receive their benefits – such as pension, unemployment and family benefits – and are covered by healthcare when moving to, staying in or travelling in other Member States**. A revision to modernise this framework has recently been provisionally agreed by the European Parliament and the Council[2]. Once adopted, the revised framework will facilitate the exercise of citizens' rights, achieve greater legal clarity and ease of enforcement, and make it easier for businesses and workers to engage in short-term cross-border activities and business trips.

At the same time, there is still strong potential to make the EU social security coordination rules easier to apply. This can be achieved through **increased and better use of digital technologies** in this area, as part of the EU broader efforts to: (i) simplify procedures; (ii) reduce burdens on individuals, businesses and national, regional and local authorities; and (iii) support competitiveness in the EU single market.

Digital transformation is **a central part of the EU's strategic priorities**, serving as a **key driver of innovation and competitiveness**. In line with the Digital Decade policy programme 2030 and the European Declaration on Digital Rights and Principles, the Union is promoting the development of seamless and human-centric digital public services across Europe.

Recent **reports by Enrico Letta and Mario Draghi** on the future of the single market and Europe's competitiveness emphasise the urgency of accelerating this digital transformation and removing barriers that undermine the single market's dynamism. Similarly, the 2026 single market and competitiveness report identifies persistent gaps in cross-border digital

[1] Regulation (EC) No 883/2004 on the coordination of social security systems and Regulation (EC) No 987/2009 laying down the procedure for implementing Regulation (EC) No 883/2004. These Regulations also apply to Norway, Iceland, Liechtenstein and Switzerland. Specific rules are in place in the agreements with the United Kingdom.

[2] The European Parliament approved the provisional agreement on 7 July 2026, whereas formal adoption by the Council is still pending.

services and mobility challenges as significant obstacles – especially for small and medium-sized enterprises (SMEs)[3] – hindering Europe's economic expansion and the seamless functioning of the digital single market. Furthermore, the 2025 EU Startup and Scaleup Strategy highlights the negative impact of regulatory fragmentation on the ability of startups and scaleups to operate efficiently within the single market and to attract talent.

While the Commission and Member States have already taken steps under the current framework to digitalise cross-border procedures, services and data exchanges in the area of social security coordination, further action at EU level is required. This aligns with repeated calls from the European Parliament, including in its 2021 Resolution on a European Social Security Pass, echoed in the Commission's Communication on digitalisation in social security coordination, in the Council Conclusions of November 2023 and in the above-mentioned Letta report. It also responds to requests from European social partners[4] and civil society organisations to strengthen the protection of workers' social security rights, enhance enforcement and facilitate labour mobility, while reducing administrative burdens.

The **Electronic Exchange of Social Security Information (EESSI) system**[5] has significantly improved the handling of cases under the EU social security coordination rules. Covering areas such as sickness, accidents at work, pensions, unemployment and family benefits, EESSI enables over 3.100 social security institutions across the 32 participating countries (the 27 Member States as well as Iceland, Liechtenstein, Norway, Switzerland and the United Kingdom) to exchange information electronically and securely, replacing paper-based communication. Since its implementation, more than 42 million cases have been handled, delivering tangible benefits for millions of individuals who now experience a more efficient processing of their social security claims.

Despite this progress, some obstacles to fully realising the benefits of the system remain. These include delays in the treatment of cross-border pension cases, which risk leaving individuals without timely access to their entitlements, thus undermining people's trust in the EU's social security coordination framework. The experience of implementing EESSI has also revealed the technical, procedural and coordination challenges involved in the digitalisation of cross-border social security procedures. Given the involvement of thousands of institutions and the coverage of all branches of social security, more agile cooperation and streamlined decision-making are necessary.

While improving the exchange of information among social security institutions through EESSI is of paramount importance, it is only the first step. Further digitalisation is required to:

[3] See the 2024 SMET report: https://ec.europa.eu/internal_market/smet/_docs/2024/smet-report-2024_en.pdf, p. 12.

[4] BusinessEurope position paper: Stepping up EU simplification efforts in the field of social affairs, ETUC contribution to the public consultation.

[5] The EESSI project was launched in 2008, with the system entering into operations in 2019. For more information see: Electronic Exchange of Social Security Information (EESSI) - Employment, Social Affairs and Inclusion.

- reinforce the protection of individuals and workers by facilitating more effective access to social security rights across Europe;
- reduce administrative hurdles and costs for individuals accessing social security benefits in other Member States and for businesses operating across borders;
- increase the quality of cross-border public services;
- provide Member States with more effective tools to fight against fraud, thus strengthening the protection of rights and fair mobility.

Challenges continue to exist in the exchanges of information between individuals, businesses and national authorities in cross-border social security scenarios. Individuals often struggle to prove their social security rights promptly when moving, travelling or working across borders. At the same time, social security institutions, labour inspectorates and healthcare providers lack efficient, secure ways to confirm this information across Member States. Meanwhile, businesses – particularly small and medium-sized enterprises (SMEs) – encounter persistent difficulties in seamlessly complying with requirements when sending workers to work temporarily abroad[6].

The problem arises from:

- existing procedures for requesting, issuing and verifying social security documents, including the European Health Insurance Card (EHIC), which are still largely paper-based;
- limited cross-border interoperability and standardisation in documents' format and verification methods;
- processes that do not sufficiently accommodate the needs of individuals and businesses.

This leads to inefficiencies, unnecessary procedural complexity, increased costs, time losses, errors and fraud. This potentially makes it harder to easily access social security benefits in other Member States, thus creating concrete barriers to intra-EU mobility[7], freedom of establishment and cross- border service provision.

To that end, the **European Social Security Pass (ESSPASS)** pilot project was launched as part of the European Pillar of Social Rights action plan. The project's aim was to explore a digital solution for the issuing and cross-border verification of social security documents. Between 2021 and 2025, digital solutions were tested for procedures related to the portable

[6] The administrative hurdles linked to procedures for the posting of workers are considered one of the most significant obstacles preventing businesses from expanding across Member States, according to the 2025 Single Market Strategy. See also the SMET report, page 12.

[7] The Draghi report emphasises that fears of losing access to social protection or facing difficulties accessing social security in other Member States discourage individuals from relocating – even though EU legislation ensures the portability of social security rights.

document A1[8] and the EHIC, with the participation of a significant number of Member States[9].

The pilot's success clearly demonstrated that the ESSPASS can:

- empower individuals to prove and exercise their rights more easily and securely across borders;
- reduce administrative burdens for businesses;
- enhance fraud prevention through real-time verification of standardised digital documents;
- improve efficiency for national authorities by reducing paper-based processes.

In light of these proven benefits, the Commission has announced a legislative framework governing the ESSPASS in the Single Market Strategy and its 2026 Work Programme, as a key component of the Fair Labour Mobility Package. **The proposed regulation sets out rules for swift deployment of the ESSPASS across all Member States. It establishes a dedicated legal instrument covering the cross-border digital data exchanges and procedures necessary to ensure effective implementation and enforcement of EU social security coordination rules, including those facilitated through the EESSI system**.

A standalone regulation addressing all digital aspects of social security coordination is necessary to ensure legal clarity, consistency, enforceability and flexibility. These objectives cannot be fully achieved through fragmented provisions within the existing social security coordination framework. A dedicated legal instrument would establish the necessary legal requirements, technical specifications and standards, interoperability requirements, governance arrangements, and robust security and data protection safeguards. It would also ensure that the corresponding binding implementation measures are applied uniformly and effectively across all Member States. Furthermore, such an approach would provide greater flexibility to accommodate future technological developments. By separating the digital aspects from the core EU social security coordination framework, the proposed regulation would enable timely updates to technical requirements, without necessitating amendments to that framework. It would focus exclusively on the digitalisation of social security coordination, thereby complementing the existing legal framework.

The proposed regulation will support a smooth transition from the ESSPASS pilot phase to full-scale implementation. It will apply to the portable document A1 one year after entry into force, and to the European Health Insurance Card after three years. After three years, it will

[8] The Portable Document A1 certifies which Member State's social security legislation applies to a person in a cross-border work situation.

[9] The DC4EU project tested the use of the European Digital Identity framework. It involved 80 institutions from 22 countries, with 15 countries (AT, DE, DK, PL, BE, NL, FR, LU, BG, CZ, ES, PT, IT, FI, CH) participating in the social security coordination work packages.
The EBSI-Vector project explored a solution relying on blockchain technologies, engaging 52 partners from 20 countries, with five countries (AT, BE, DE, IT, NL) involved in the social security coordination use cases. These projects were financially supported by the Digital Europe programme.

also cover all other social security documents, except those for which an assessment shows that digitalisation under ESSPASS would not bring added value.

By building on the European Digital Identity (EUDI) and the Single Digital Gateway frameworks, the proposed Regulation will give individuals secure, direct access to their social security documents via their EUDI wallets, while national authorities will benefit from instant verification capabilities and better ways to detect fraud. The introduction of binding time limits for issuing documents will further improve predictability for individuals and businesses, including the self-employed, by reducing unnecessary delays. This will help ensure the effective and timely exercise of rights under the EU social security coordination framework. In addition, it will facilitate cross-border operations for businesses by enabling them to plan with confidence and avoid administrative bottlenecks linked to variable processing times. Greater transparency and direct access to proof of entitlements will make it easier for workers and self-employed to demonstrate their coverage when working across borders, reduce administrative hurdles linked to paper-based procedures, and help prevent fraud and abuse that can undermine their rights. For businesses, particularly SMEs, compliance with posting requirements will be simplified by achieving convergence in information requirements for portable document A1 requests and reducing redundant data submission, in line with the 'once-only' principle. This will lower administrative costs, improve legal certainty when sending workers abroad, and help ensure faster, more reliable access to the required documents. Governance will also be strengthened and simplified by replacing the current arrangements with a more agile and structured approach. A dedicated group on digitalisation in social security coordination composed of Member States' representatives will be created to help develop technical specifications, monitor progress and share experiences. This group will continue the work previously carried out by the Technical Commission for data processing, established pursuant to Article 73 of Regulation (EC) No 883/2004 of the European Parliament and of the Council[10], and the ad hoc group of the Administrative Commission for the coordination of social security systems on ESSPASS. Moreover, a committee composed of Member States' representatives will support the Commission in the adoption of implementing acts in accordance with the examination procedure set out in Article 5 of Regulation (EU) No 182/2011 of the European Parliament and of the Council[11] ('comitology Committee'). This will ensure the rules remain adaptable and future-proof, while preserving their binding nature.

The proposed regulation concerns persons covered by the EU rules on social security coordination as defined in Article 2 of Regulation (EC) 883/2004 which includes workers, self-employed persons, pensioners, unemployed and economically inactive insured persons,

[10] Regulation (EC) No 883/2004 of the European Parliament and of the Council of 29 April 2004 on the coordination of social security systems (OJ L 166, 30.4.2004, p. 1, ELI: http://data.europa.eu/eli/reg/2004/883/oj)

[11] Regulation (EU) No 182/2011 of the European Parliament and of the Council of 16 February 2011 laying down the rules and general principles concerning mechanisms for control by the Member States of the Commission's exercise of implementing powers (OJ L 55, 28.2.2011, p. 13, ELI: http://data.europa.eu/eli/reg/2011/182/oj)

and their family members. These rules also apply, under Regulation (EU) No 1231/2010[12], to third-country nationals who are legally residing in a Member State and are in a cross-border situation. Regulation (EU) No 1231/2010 will therefore need to be amended to ensure that the measures introduced by this proposal also apply to these third-country nationals.

In terms of territorial coverage, the proposed regulation will encompass all the Member States and will also be relevant for the EEA countries, Switzerland and the UK, subject to the applicable legal arrangements.

- **Consistency with existing provisions in the policy area**

The proposed regulation supports the objectives of the European Pillar of Social Rights and is consistent with existing Union related legislation, particularly the EU social security coordination rules. It complements these rules by establishing a dedicated legal instrument governing all cross-border digital procedures and data exchanges necessary to facilitate their effective implementation and enforcement. The proposal does not modify existing rights and obligations established under the social security coordination framework and does not compromise the level of individual protection it entails. The recent revision of this framework modernised and simplified it. The proposal is consistent with that approach as it further modernises and simplifies the application of this framework through digitalisation. By promoting the use of digital technologies across the Member States, the proposal strengthens the existing protection, by simplifying access to social security rights and services across borders.

The proposal is consistent with the Single Digital Gateway Regulation (SDGR)[13]. The SDGR requires Member States to ensure that individuals and businesses can access and complete administrative procedures fully online, including: (i) requests to determine which social security legislation covers the holder – resulting in the issuing of the portable document A1; (ii) EHIC applications; and (iii) pension claims. To ensure that individuals can fully exercise their rights to free movement without administrative obstacles, the proposal expands the SDGR in order to extend the possibility to submit fully online requests to cover additional social security documents.

The proposal forms part of the Fair Labour Mobility Package. The package includes measures aimed at modernising and simplifying the application and enforcement of labour mobility and social security coordination rules. This is to ensure that mobility within the EU is fair and protects workers against exploitation or disadvantages linked to mobility, while fostering a competitive and dynamic business environment that thrives on skills and innovation.

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12 Regulation (EU) No 1231/2010 of the European Parliament and of the Council of 24 November 2010 extending Regulation (EC) No 883/2004 and Regulation (EC) No 987/2009 to nationals of third countries who are not already covered by these Regulations solely on the ground of their nationality (OJ L 344, 29.12.2010, p. 1, ELI: https://eur-lex.europa.eu/eli/reg/2010/1231/oj).

13 Regulation (EU) 2018/1724 of the European Parliament and of the Council of 2 October 2018 establishing a single digital gateway to provide access to information, to procedures and to assistance and problem-solving services and amending Regulation (EU) No 1024/2012 (OJ L 295, 21.11.2018, p. 1, ELI: http://data.europa.eu/eli/reg/2018/1724/oj)

- **Consistency with other Union policies**

The proposal supports the European goals of simplifying administrative procedures for individuals, businesses and national, regional and local authorities: less red tape, more trust, better enforcement. This helps relaunch EU competitiveness, in line with the Draghi report and the EU competitiveness compass. It also complements the 28th regime to help companies (start-ups and scale-ups in particular) overcome barriers to operating across Europe, supporting growth, innovation and global competition.

The proposal builds on ongoing efforts at EU level to foster inclusive digital participation for all people across Europe[14] and to accelerate the digitalisation of cross-border public services. This aligns with the Digital Decade programme's targets of 100 % online provision of key services and of individuals having access to secure electronic identification solutions by 2030. The proposal also builds on existing cross-sectoral initiatives such as the SDGR and the Once-Only Technical System, the European Digital Identity framework and potentially the future European Business Wallets, the Internal Market Information System and the Interoperable Europe Act.

The proposal complements other legislation, systems and tools supporting labour mobility, cross-border provision of services, social protection, cross-border healthcare and enforcement of labour law intended to further facilitate the mobility of individuals and workers in the EU, simplify administrative procedures for people, businesses and national authorities, and uphold workers' rights. Such systems and tools include:

- the European tracking service on pensions;
- the proposal for an e-Declaration on the posting of workers which has been provisionally agreed by the European Parliament and the Council and the Road Transport Posting Declaration Portal[15];
- the European Health Data Space, including MyHealth@EU infrastructure, set out in Regulation (EU) 2025/327 of the European Parliament and of the Council[16];
- initiatives to explore the potential for interoperability between different Member States' labour and social identity cards.

2. LEGAL BASIS, SUBSIDIARITY AND PROPORTIONALITY

- **Legal basis**

The proposal is based on Article 48 of the Treaty on the Functioning of the European Union (TFEU). That article gives the EU the power to adopt measures to coordinate Member States'

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[14] European declaration on digital rights and principles.

[15] References are made to the road transport sector as this is the only transport mode for which a dedicated EU posting declaration portal has been established. No equivalent system exists for the other transport modes.

[16] Regulation (EU) 2025/327 of the European Parliament and of the Council of 11 February 2025 on the European Health Data Space and amending Directive 2011/24/EU and Regulation (EU) 2024/2847 (OJ L, 2025/327, 5.3.2025, ELI: http://data.europa.eu/eli/reg/2025/327/oj)

social security systems in order to facilitate the free movement of workers and the protection of their social security rights across the Union. While Article 48 TFEU applies to employed and self-employed mobile workers and ‘their dependants’, Regulation (EC) No 883/2004, based on what are now Articles 48 and 352 TFEU, extends social security coordination to persons moving within the Union who do not pursue an economic activity. Article 48 TFEU provides a solid legal basis for adopting measures complementary to the existing social security coordination framework in order to digitalise cross-border social security procedures and facilitate access to social security benefits and fair mobility within the EU.

- **Subsidiarity (for non-exclusive competence)**

The free movement of persons and freedom to provide services are fundamental freedoms of the European Union. To fully benefit from these freedoms, individuals and businesses must rely on efficient public services, including when accessing social security benefits or sending workers to work abroad. Barriers to the seamless proof and cross-border verification of social security rights and insurance status cannot be dealt with effectively by Member States on their own. Digital solutions implemented by a single Member State will not ensure cross-border interoperability and the recognition and verification of social security documents.

EU-level action will improve the proof and verification of social security rights and insurance status. This in turn will improve access to benefits and healthcare, thus establishing a more supporting environment for workers who are relocating or considering relocation within the EU and in cross-border situations. Given the cross-border nature of the existing problems, effective solutions are best pursued at EU level, rather than through individual efforts by Member States. EU-level action will benefit mobile individuals by making their social security rights more transparent and accessible, while reducing fraudulent and exploitative practices. By reducing unnecessary administrative difficulties and complexities, EU action will assist businesses operating across borders, while supporting national, regional and local authorities by simplifying processes and strengthening cross-border cooperation. This will improve understanding and implementation of the rules and make them easier to enforce, while fostering trust in the EU’s social security coordination framework and Europe’s single market.

EU action will also maximise the impact of prior EU investments, complementing key digital EU initiatives such as the SDGR and the Once Only Technical System (OOTS), the EUDI framework, the European Businesses Wallets, the Interoperable Europe Act and the European Health Data Space. In this way, it will form part of a coherent and cohesive EU digital landscape that serves the interests of the EU and its Member States. If the EU does not act now, action by Member States would likely lead to fragmented, uncoordinated and incompatible solutions that fail to integrate with existing EU initiatives. This could result in suboptimal outcomes and be more costly to reverse at a later stage.

- **Proportionality**

The proposal respects the principle of proportionality as it does not go beyond what is necessary and appropriate for EU action. It establishes the ESSPASS framework for the request, issuance and cross-border verification of social security documents created under the EU social security coordination rules. This ensures interoperability, digital exchange and mutual recognition of such documents, without interfering with national social security systems. By relying on the existing EU framework (particularly the EUDI framework) instead of building a completely new solution, the ESSPASS further adheres with the proportionality principle, employing a cost-effective strategy which minimise costs and optimise resources efficiently.

The proposal does not introduce any new declaration, reporting or documentation requirements for employers or self-employed persons, nor does it alter the criteria for determining the social security legislation applicable to a person in a cross-border situation.

- **Choice of the instrument**

Given the cross-border nature of the problem and the need to prevent regulatory fragmentation, a regulation is considered the most suitable, effective and proportionate legal instrument to achieve the defined policy objectives. As a directly applicable act, it ensures uniform application across Member States, preventing fragmentation and providing legal certainty and effectiveness. This also aligns with the identified legal basis and the existing social security coordinaton framework, which it complements.

3. RESULTS OF *EX POST* EVALUATIONS, STAKEHOLDER CONSULTATIONS AND IMPACT ASSESSMENTS

- ***Ex post* evaluations/fitness checks of existing legislation**

N/A

- **Stakeholder consultations**

From the outset, the Commission placed stakeholder engagement at the forefront of its strategic planning, acknowledging its critical role in shaping effective policies. The Commission launched the ESSPASS as a pilot project to actively involve Member States from the early stages of development and to foster ownership. This ensured that the initiative is both feasible and responsive to the needs and realities of those it aims to serve. The pilot activities not only demonstrated the ESSPASS's viability and benefits but also provided valuable feedback, technical expertise and insight. These directly informed decisions on the initiative's subsequent development.

In line with the Better Regulation principles, the Commission conducted extensive consultations to ensure that the perspectives and interests of all relevant stakeholders were considered and integrated into the policymaking process. The consultation process gathered feedback on the scale and nature of the problems to be addressed, the objectives of the proposed initiative, the policy options under consideration, and their potential impacts – including costs and opportunities for simplification. This comprehensive evidence gathering included the following activities, some of them as part of a supporting study on digitalisation in social security coordination:

- two surveys (March-April 2025) targeting social security institutions, healthcare providers and enforcement authorities, with 87 responses from 32 countries;
- 97 stakeholder interviews (2025) with national authorities, social partners and technical experts to assess costs, benefits and feasibility;
- two workshops (June 2025) with 62 and 44 participants respectively, to validate problem definitions and policy options;
- meetings with experts involved in the ESSPASS pilot projects (2025-2026);
- seminars and exchanges as part of social security coordination, including dedicated meetings on ESSPASS and impact estimates;
- an implementation dialogue on fair labour mobility (16 September 2025);
- a high-level meeting on digitalisation in social security coordination with Member State representatives (30 September 2025);
- a hearing of EU social partners (6 November 2025), gathering the views of workers' and employers' organisations;
- a call for evidence on ESSPASS (14 January 2026-11 February 2026) and one on the Fair Labour Mobility Package;
- a public consultation (22 January-16 April 2026).

These consultations revealed broad support for further digitalisation in social security coordination and for the ESSPASS initiative as a means to simplify cross-border social security procedures, facilitate access to social security benefits across borders, reduce fraud and reduce administrative burdens for individuals, businesses and national authorities. Stakeholders – including trade unions, employers and public authorities – emphasised the need for strong enforcement mechanisms, simplified processes and real-time verification mechanisms to increase effectiveness. There was broad consensus on the reuse of EUDI Wallets as the primary digital solution. There was also broad consensus on ensuring a fallback option – such as secure, verifiable and revocable physical documents – for those unable or unwilling to use digital tools. Some concerns were raised about implementation costs and data security.

The public consultation and the calls for evidence reinforced these findings, with 93% of respondents to the public consultation supporting a standardised solution for the digitalisation of social security documents, the portable documents and the EHIC. Delays in document issuance, cross-border verification challenges and fraud risks were cited as major pain points, while real-time verification and interoperability emerged as top priorities. Overall, the consultation underscored the ESSPASS's potential to boost fair labour mobility, combat fraud and modernise social security coordination, provided it is designed inclusively, governed robustly and integrated seamlessly with existing systems.

- **Collection and use of expertise**

N/A

- **Impact assessments**

The proposal for a regulation is accompanied by an impact assessment report[17], a draft of which was submitted to the Regulatory Scrutiny Board (RSB) on 29 April 2026. The RSB issued a positive opinion with reservations on 4 May 2026, and the impact assessment report was revised in accordance with the Board's recommendations. The RSB's more detailed technical comments were also addressed.

The impact assessment examined a range of policy options. The selected options draw on the findings from the pilot activities, stakeholder insights and additional factors such as: (a) consistency with EU objectives, particularly the EU's simplification and digitalisation agenda; (b) reliance on existing EU initiatives such as the SDGR and the EUDI framework to minimise expenses and optimise resource use; and (c) the EU's shift towards user-centricity and privacy-by-design as well the need to address the digital divide.

Three policy options were assessed:

– Policy Option 1 establishing a solution enhancing the existing format of portable documents and the EHIC and enabling their verification across borders. This involves issuing the documents in a standardised format, with digital security features, which can be either printed or stored electronically.

– Policy Option 2 introducing a solution for the issuing and instant verification of portable documents and the EHIC, relying on the EUDI framework. Individuals and businesses would be able to securely store these documents within their EUDI Wallets. If they cannot or prefer not to use the EUDI Wallets, non-enhanced physical documents would remain available.

– Policy Option 3 establishing a solution encompassing the main elements set out in Policy Option 2. However, individuals and businesses who cannot or prefer not to use EUDI Wallets would receive enhanced physical documents which can be verified even when printed (as in Policy Option 1).

The following measures were common to all policy options to ensure their smooth implementation and strengthen their impact on EU competitiveness and simplification:

– Enabling individuals across all Member States to request and receive portable documents electronically, even those not covered by the SDGR.

– Introducing binding deadlines for national authorities to issue social security documents, thus ensuring their timely availability for cross-border use without compromising accuracy.

– Convergence between national information requirements for requesting the portable document A1 as well as the possibility of using the multilingual public interface for the declaration of posted workers (e-declaration) once established, to the extent there

[17] SWD (2026) …

would be overlap of information requirements with the e-declaration. This would enable applicants to submit data only once (following the once-only principle), as requested by stakeholders and several Member States during the negotiations on the e-declaration. This would be in line with the overall EU objective to reduce administrative hurdles for businesses operating across borders. Convergence in information requirements would also ensure better alignment on checks conducted before issuing the A1 form.

Following an analysis of the policy alternatives, Policy Option 3 was identified as the preferred choice. That option was deemed the most effective at achieving the objectives, the most efficient in terms of costs and benefits, and the option ensuring the highest level of consistency with other EU policies.

The assessment indicates that the preferred option is likely to significantly reduce reliance on paper-based processes by introducing standardised, simplified digital procedures for requesting, issuing and verifying social security documents between Member States. This ensures seamless recognition of documents throughout the EU while offering flexibility for individuals on how data are stored and presented. Implementing this policy option is expected to deliver significant benefits for individuals, national authorities, labour inspectorates, healthcare providers and businesses. Among the advantages, document verification times will be reduced to just a few seconds for documents stored in the EUDI Wallets and to around one minute for non-Wallet documents. This is in contrast to the current 5 to 16 minutes for the portable document A1 and 2 to 5 minutes for EHIC. Over a 12-year period, this efficiency is expected to generate cost savings of between EUR 24 million to 72 million for verifiers (e.g. labour inspectorates) and EUR 21 million to 64 million for businesses (this is particularly relevant for SMEs, which constitute 99% of EU businesses) in relation to the portable document A1. For EHIC verifications, healthcare providers' savings are estimated at between EUR 23 million and EUR 69 million.

Enhanced security is another key advantage. Digitally signed documents with instant verification will make forgery almost impossible, unlike the current situation. Over a 12-year period, this could lead to cost savings from reduced fraud of up to EUR 157 million for the portable document A1 and EUR 120 million for the EHIC. Additionally, reduced use of plastic – estimated at up to 1 482 tonnes – could yield up to EUR 161 million in savings.

The preferred option supports the application of the rules on the coordination of social security systems, easing access to benefits and healthcare. It also fosters trust, fairness and data protection by giving users control of their data and ensuring GDPR-compliant handling of personal data. Social benefits include increased transparency and fairness: workers will have direct access to portable documents A1 and will gain a clearer understanding of their social security position and rights when posted abroad. With full knowledge of their social security arrangements, workers will become less susceptible to fraudulent practices and will gain easier access to benefits they might be entitled to in the host country.

The preferred option also supports competitiveness by simplifying procedures for companies operating across borders and supports advancements in digitalisation and innovation.

The use of EUDI Wallets for storing and sharing high-circulation documents like the EHIC will accelerate wallet adoption. This will create a foundation for the future integration of additional labour mobility documents through sector-specific legislation.

The preferred option includes upfront investments and annual maintenance costs. These would be primarily borne by national public administrations, including ministries, social security institutions and labour inspectors, as well as by healthcare providers. Individuals and businesses are expected to face minimal expenses. Such expenses would mainly be related to smartphone use if they want to store their social security coordination documents in the national EUDI Wallets. Overall, total one-off EU costs (over a period of three years) are estimated to be between EUR 186 million and EUR 218 million, with cumulative recurrent costs amounting to EUR 278 million over the following 12 years (EUR 23.2 million annually). The costs reflect the necessary infrastructure and integration efforts and are balanced by projected long-term efficiencies and cost savings.

To support this investment, deployment should be eligible for EU funding, notably under the successor instrument of the European Social Fund + (digitalisation of public services and institutions) and the European Competitiveness Fund for the post-2027 programming period.

• **Regulatory fitness and simplification**

The initiative is expected to have a positive impact on competitiveness. Businesses are likely to experience decreased costs thanks to reduced administrative hurdles and the shorter times required to obtain and verify the portable document A1 and provide additional information in cases of doubts about its validity. SMEs, which constitute 99% of EU businesses and typically face greater challenges in meeting regulatory requirements due to their limited administrative resources, are expected to benefit more than larger companies. This is especially the case in sectors like construction and services, where posting and activities in two or more Member States are more common. Easier compliance with requirements can lead to greater efficiency in allocation of resources towards value-creating activities. This in turn can boost productivity. Improved access to cross-border labour markets will enable businesses to take advantage of a broader talent pool and optimise operations, making them more competitive in both local and international markets. The initiative will also promote technological advancement by encouraging digitalisation in public services and seamless access to services for individuals and businesses. By adopting innovative solutions for the proof and cross-border verification of social security rights and insurance status, the initiative strengthens capacity for further innovations within the public sector. This should further contribute to EU economic expansion and business competitiveness.

The proposal is consistent with the ‘Digital check’. It fully aligns with core e-government principles:

- digital by default, promoting digital procedures as preferred choice, while still offering alternative options;
- once-only principle, reducing redundant data submission;

- interoperability by design, facilitating cross-border recognition and verification of documents as well as cross-border data exchange, and reducing fragmentation;
- user-centricity, putting people at the centre and ensuring predictable processing times;
- inclusiveness and accessibility, guaranteeing equal access to all, notably to persons with disabilities, older people and individuals with limited digital skills by offering the option to request enhanced physical documents;
- trustworthiness and security, promoting the protection of personal data and high security standards;
- cross-border by default, establishing services available across borders and reducing unnecessary barriers to mobility.

- **Fundamental rights**

The proposed regulation is expected to make it easier to coordinate social security systems by easing access to social security benefits and healthcare across Europe (Articles 34 and 35 of the Charter of Fundamental Rights of the European Union Charter). This is achieved through improved proof and verification of social security rights and the insurance status of individuals moving across the EU. No reduction in the baseline level of protection has been identified.

By ensuring social security rights and documents are more easily transferable and verifiable through simplified procedures and reduced administrative processing times, the initiative is expected to have a positive impact on:

- the free movement of persons and workers, as provided for in Article 45 of the TFEU and in Articles 15 and 45 of the Charter of Fundamental Rights;
- the freedom to provide services, as enshrined in Article 56 TFEU and Article 16 of the Charter.

As a result, workers would be more likely to take advantage of cross-border job opportunities and businesses would be more eager to operate across borders. The proposed regulation does not place any limitations on these freedoms.

The proposal is also likely to have a positive impact on the right to good administration, as provided for in Article 41 of the Charter of Fundamental Rights. By simplifying procedures and reducing processing times, it is anticipated that requests and operations will be handled within a reasonable time, thus increasing legal certainty for individuals and businesses.

The proposed regulation includes the processing of personal data. It should therefore ensure that such processing complies with the requirements of Regulation (EU) 2016/679 of the European Parliament and of the Council (the 'General Data Protection Regulation')[18] and the

[18] Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation) (OJ L 119, 4.5.2016, p. 1, ELI: http://data.europa.eu/eli/reg/2016/679/oj)

fundamental rights guaranteed in the Charter of Fundamental Rights, particularly the rights to privacy and data protection in Articles 7 and 8 of the Charter, and in the TFEU, especially Article 16 on the right to the protection of personal data. The preferred option is expected to ensure a high level of security and data protection by giving users control, by minimising data exposure, by guaranteeing selective disclosure, and by ensuring GDPR-compliant, secure and transparent handling of personal data when using EUDI Wallets. Similarly, users will benefit from legal safeguards when relying on enhanced physical documents.

4. BUDGETARY IMPLICATIONS

The proposal has very limited budgetary implications for the EU budget. The only operational costs will be generated by organising meetings of the committee and the group on digitalisation, and by supporting the Member States' implementation of the digital solutions established under the proposal. These expenses will be covered using existing internal budget lines through redeployment of existing resources.

5. OTHER ELEMENTS

• Implementation strategy, implementation plans and monitoring, evaluation and reporting arrangements

A comprehensive draft monitoring framework has been designed to monitor the implementation and evaluate the initiative's impact, thus ensuring it remains fit for purpose and achieves the intended objectives. This framework will undergo further refinement based on the ultimate legal specifications and implementation schedule. Progress will be tracked through a set of operational, result and impact indicators linked to the specific objectives. The framework will also help identify implementation challenges and help ensure that timely and consistent implementation support is in place from the outset and throughout the rollout of the initiative. The Commission, in close cooperation with Member States, will regularly collect and analyse data, making use of existing reporting mechanisms. The data will be used to identify implementation gaps and emerging implementation needs, assess the measure's efficiency, and provide the necessary evidence base for future evaluation.

The initiative could be evaluated no sooner than seven years following its entry into force to assess the proposal's actual impacts.

• Explanatory documents (for directives)

N/A

• Detailed explanation of the specific provisions of the proposal

Article 1 defines the subject matter, providing clarity as regards the proposal's objectives.

Article 2 sets out the proposal's material and personal scope by specifying the categories of people and the social security branches to which the proposal applies.

Article 3 sets out the definitions of the main concepts used in the proposed regulation to facilitate uniform interpretation and application.

Article 4 establishes the framework for the ESSPASS digital solution for the request, issuance, cross-border verification, and recognition of social security documents, and outlines its main features.

Article 5 determines the date from which Chapter I on the ESSPASS will apply to social security documents. The deferred date of application is to give Member States sufficient time to adapt to the new requirements.

Article 6 lays down an obligation for Member States to give individuals and businesses the option to submit requests for the social security documents covered under the proposal fully online using procedures that comply with Regulation (EU) 2018/1724[19].

Article 7 sets out the rules governing the issuance, validity and verification of social security documents. It mandates a default digital format for these documents – intended for use in the EUDI Wallets – while allowing for physical documents, enhanced with digital features to strengthen their security. The article also provides for automatic notifications to the persons concerned and the employers when documents are withdrawn and ensures cross-border recognition and verification by designated verifiers to confirm authenticity, integrity and validity. In addition, it confers implementing powers on the Commission to lay down the functional, operational and technical specifications of the digital solution in accordance with the examination procedure referred to in Article 5 of Regulation (EU) No 182/2011.

Article 8 introduces binding deadlines for the issuing of social security documents. This is to prevent unnecessary delays, ensure the effective and timely exercise of rights under the EU social security coordination rules and facilitate cross-border operations for businesses. The article empowers the Commission to set document-specific deadlines through implementing acts, subject to the examination procedure referred to in Article 5 of Regulation (EU) No 182/2011.

Article 9 sets out specific provisions for the European Health Insurance Card.

Article 10 introduces convergence in information requirements for requests of the portable document A1. This is to prevent inconsistencies across Member States in the verification of the relevant facts before issuing such documents while streamlining request processes. The Article also provides for a possible future technical interoperability between, on the one hand, the national portals used to request the portable document A1 and, on the other hand, the public interfaces connected to the Internal Market Information System for the posting of drivers in the road transport sector and the posting declarations under Directive 2014/67/EU of the European Parliament and of the Council[20]. The aim is to reduce administrative burdens and promote reusability of data.

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19 Regulation (EU) 2018/1724 of the European Parliament and of the Council of 2 October 2018 establishing a single digital gateway to provide access to information, to procedures and to assistance and problem-solving services and amending Regulation (EU) No 1024/2012 (OJ L 295, 21.11.2018, p. 1, ELI: http://data.europa.eu/eli/reg/2018/1724/oj).

20 Directive 2014/67/EU of the European Parliament and of the Council of 15 May 2014 on the enforcement of Directive 96/71/EC concerning the posting of workers in the framework of the

Article 11 reinforces the use of the EESSI system as the primary channel for cross-border data exchanges between social security institutions under EU social security coordination rules. The article provides that the system should continue to function in accordance with the current technical and operational specifications. Any subsequent adaptations or enhancements should be introduced via implementing acts, in accordance with the examination procedures referred to in Article 5 of Regulation (EU) No 182/2011, to ensure their binding and uniform application across all Member States. To further improve the trustworthiness of the system and ensure that individuals have timely access to their social security benefits, the article also introduces an obligation for Member States to comply with the maximum time periods for exchanges through EESSI laid down in Annex I to the proposed Regulation. In addition, the article empowers the Commission to adopt, where necessary, delegated acts to amend that Annex.

Article 12 strengthens cooperation between Member States by providing a legal basis that enables the electronic exchange of information to detect changes in circumstances affecting social security rights and obligations and to better fight against fraud. The article empowers the Commission to adopt technical arrangements through implementing acts, in accordance with the examination procedure referred to in Article 5 of Regulation (EU) No 182/2011, where the EESSI system is not deemed to be the most effective or appropriate exchange method.

Article 13 creates a group on digitalisation in social security coordination to provide operational support and establish a community of practice for exchanging experiences and knowledge, thus facilitating cooperation among Member States.

Article 14 establishes a reporting obligation for Member States to ensure transparency and accountability when implementing provisions related to Article 8(1) and Article 11(2).

Article 15 specifies the data protection requirements applicable to the processing of personal data under the proposed regulation. It ensures that the processing of personal data carried out pursuant to the proposed regulation complies with Regulation (EU) 2016/679 of the European Parliament and of the Council and, where applicable, Regulation (EU) 2018/1725 of the European Parliament and of the Council[21].

Article 16 empowers the Commission to adopt delegated acts in accordance with Article 290 TFEU and lays down the conditions governing the exercise of that delegation.

Article 17 provides that the Commission will be assisted by a committee in adopting implementing acts in accordance with Regulation (EU) No 182/2011.

Article 18 provides for the evaluation of the proposed regulation's implementation and effectiveness. Articles 19 and 20 provide for the amendment of Regulation 883/2004 and

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provision of services and amending Regulation (EU) No 1024/2012 on administrative cooperation through the Internal Market Information System (OJ L 159, 28.5.2014, pp. 11, ELI: http://data.europa.eu/eli/dir/2014/67/oj)

[21] Regulation (EU) No 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC (OJ L 295, 21.11.2018, p. 39, ELI: http://data.europa.eu/eli/reg/2018/1725/oj)

Regulation (EC) No 987/2009 of the European Parliament and of the Council to ensure their alignment with the proposed regulation and the new governance framework, and to maintain legal consistency.

Article 21 provides for the amendment of Annex II of Regulation (EU) 2018/1724 to include in the scope of the Single Digital Gateway Regulation the online procedures for requesting the social security documents falling within the scope of this Regulation.

Article 22 lays down the rules concerning the entry into force of the proposed regulation.

2026/0271 (COD)

Proposal for a

REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

on digitalising the coordination of social security systems, laying down a framework for the European Social Security Pass (ESSPASS) and amending Regulations (EC) No 883/2004, (EC) No 987/2009 and (EU) No 2018/1724

(Text with EEA relevance)

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty on the Functioning of the European Union, and in particular Article 48 thereof,

Having regard to the proposal from the European Commission,

After transmission of the draft legislative act to the national parliaments,

Acting in accordance with the ordinary legislative procedure,

Whereas:

(1) The free movement of persons is a fundamental freedom guaranteed by the Treaty on the Functioning of the European Union (TFEU) and a cornerstone of the Union single market. For this freedom to be fully realised, it is essential that individuals, workers and their families can effectively exercise their social security rights when moving to, staying in, residing or working in another Member State.

(2) To that end, the Union has established a comprehensive legal framework under Regulations (EC) No 883/2004[22] and (EC) No 987/2009[23] of the European Parliament and of the Council. Those rules coordinate Member States' social security systems to ensure that individuals in cross-border situations retain access to social security benefits such as pensions, unemployment benefits and healthcare. However, the proper application of those rules requires efficient social security procedures that keep pace with technological progress and evolving societal needs.

(3) Digitalisation in social security coordination is essential to increase the efficiency of data exchanges, accelerate claims processing, streamline access to benefits and reduce administrative hurdles for individuals, businesses and national authorities. It also helps strengthen fraud prevention, thereby reinforcing trust in the Union's social security coordination framework and contributing to making mobility free and fair for all.

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22 Regulation (EC) No 883/2004 of the European Parliament and of the Council of 29 April 2004 on the coordination of social security systems (OJ L 166, 30.4.2004, p. 1, ELI: http://data.europa.eu/eli/reg/2004/883/oj).

23 Regulation (EC) No 987/2009 of the European Parliament and of the Council of 16 September 2009 laying down the procedure for implementing Regulation (EC) No 883/2004 on the coordination of social security systems (OJ L 284, 30.10.2009, p. 1, ELI: http://data.europa.eu/eli/reg/2009/987/oj).

(4) The complexity of cross-border data exchanges and the further digitalisation of procedures in social security coordination require a dedicated legal instrument, capable of adapting to future technological, social and policy developments. That legal instrument should complement the Union rules on social security coordination, laid down in Regulations (EC) No 883/2004 and (EC) No 987/2009, by dealing with the digital systems and processes necessary for those rules' effective implementation and enforcement. Since the provisions of this act are intrinsically linked and should operate in conjunction with the social security coordination Regulations and complement them, these provisions also need to take the form of a regulation.

(5) Due to the technical specificity, interoperability requirements and rapidly evolving nature of digital processes, it is appropriate to adopt the necessary rules in the form of a separate legal instrument. This is to ensure legal clarity and uniform application across the Union, and to provide the flexibility to accommodate emerging digital developments, without requiring amendments to the Union rules on social security coordination.

(6) In order to ensure legal certainty and consistency with Regulation (EC) No 883/2004, the scope of this legal instrument should be aligned with the personal and material scope laid down in that Regulation.

(7) It is necessary to lay down rules for the establishment and operation of the European Social Security Pass (ESSPASS). This is a digital solution for the electronic request, issuance and cross-border verification of social security documents, including the European Health Insurance Card (EHIC). The ESSPASS should ensure that individuals are able to swiftly prove their social security rights and should support the seamless exercise of those rights in cross-border situations, while enabling social security institutions, labour inspectorates and healthcare providers to efficiently and securely verify the relevant information. This in turn would facilitate fraud checks and strengthen enforcement. The ESSPASS should also simplify compliance with applicable requirements for businesses engaging workers, and for self-employed, in cross-border situations.

(8) The ESSPASS pilot phase from 2021 to 2025, launched under the European Pillar of Social Rights action plan and supported by the Digital Europe programme, proved both the technical feasibility and the practical benefits of the ESSPASS.

(9) Procedures related to the portable document A1 and the EHIC have already demonstrated their potential to reduce administrative burden, while the pilot phase has provided evidence of their technical feasibility. The ESSPASS framework should first apply to the portable document A1, reflecting its advanced state of technical preparedness. It should subsequently apply to the EHIC, and to the other social security documents, except those for which an assessment demonstrates no relevance, feasibility or cost-effectiveness.

(10) To avoid duplication of effort, the ESSPASS should build on and complement existing Union digital initiatives, particularly Regulations (EU) 2018/1724[24], (EU) 2024/903[25] and (EU) 910/2014[26] of the European Parliament and of the Council.

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24 Regulation (EU) 2018/1724 of the European Parliament and of the Council of 2 October 2018 establishing a single digital gateway to provide access to information, to procedures and to assistance and problem-solving services and amending Regulation (EU) No 1024/2012 (OJ L 295, 21.11.2018, p. 1, ELI: http://data.europa.eu/eli/reg/2018/1724/oj).

(11) Regulation (EU) 2018/1724 requires Member States to enable individuals and businesses to complete certain procedures fully online. This includes requests to determine which social security legislation covers the holder, resulting in the issuing of the portable document A1, as well as applications for the EHIC and claims for pension benefits. To ensure that individuals can fully exercise their rights to free movement and labour mobility without administrative obstacles, the possibility to submit requests fully online should be extended to cover the social security documents within the scope of this Regulation. Annex II to Regulation (EU) 2018/1724 should therefore be amended to include the online procedures for requesting the social security documents falling within the scope of this Regulation.

(12) To maintain a human-centric approach to digitalisation and optimise Member States' investments, reliance on the European Digital Identity Wallets as established by Regulation (EU) 2024/1183 of the European Parliament and of the Council, in combination with Regulation (EU) 2018/1724, is crucial. Those wallets provide a harmonised, legally sound, highly secure and privacy-compliant mechanism for securely storing and sharing digital identity data and documents.

(13) To promote efficiency and modernisation, digital social security documents should become the default format. At the same time, it is essential that individuals and businesses retain the right to request and receive physical social security documents. This promotes inclusivity and avoids exacerbating inequalities in access to services. The physical social security documents should be enhanced with standardised digital features that enable their secure verification, thus helping to reduce the risk of fraud. As those physical documents will contain digital features, they should fall within the scope of this Regulation.

(14) Workers in cross-border situations often lack clear information about their social security position. For instance, they might be unaware that employers have requested a portable document A1 related to their cross-border activity or have had one issued. Workers' direct access to social security documents should therefore be facilitated, improving transparency over social security rights and affiliation. This is expected to reduce exposure to fraud and guarantee that workers swiftly receive the social security benefits to which they are entitled.

(15) Given the importance of tackling cross-border social security fraud and reinforcing mutual trust, Member States should properly verify the accuracy of the information provided before issuing social security documents, exercising due diligence. The use of digital tools should be promoted to support this process.

(16) Natural persons under legal representation, including minor children, might not have access to a European Digital Identity Wallet. Therefore, legal representatives such as parents, guardians or other duly authorised persons should be able to receive and store the represented person's digital social security documents in their own European Digital Identity Wallet. This is necessary to facilitate access to digital documents of persons under legal representation, which is particularly important when they need medical care in emergencies.

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[25] Regulation (EU) 2024/903 of the European Parliament and of the Council of 13 March 2024 laying down measures for a high level of public sector interoperability across the Union (Interoperable Europe Act) (OJ L, 2024/903, 22.3.2024, ELI: http://data.europa.eu/eli/reg/2024/903/oj).

[26] Regulation (EU) No 910/2014 of the European Parliament and of the Council of 23 July 2014 on electronic identification and trust services for electronic transactions in the internal market and repealing Directive 1999/93/EC (OJ L 257, 28.8.2014, pp. 73, ELI: http://data.europa.eu/eli/reg/2014/910/oj

(17) To ensure equal access, the social security documents and the processes through which they are requested, made available and shared should be accessible to persons with disabilities in accordance with Directive (EU) 2016/2102 of the European Parliament and of the Council[27], and, where applicable, Directive (EU) 2019/882 of the European Parliament and of the Council[28].

(18) In order to ensure the timely exercise of the rights provided for in Regulation (EC) No 883/2004, competent institutions should be required to issue social security documents to the person concerned and, where applicable, to the employer, within binding time limits. Experience has shown that delays in the issuing of such documents can hinder individuals' timely access to benefits and create obstacles to the cross-border operations of businesses. Given the importance of rapid access to healthcare during a temporary stay abroad, the maximum deadline for the issuance of the European Health Insurance Card should not exceed 24 hours from the submission of a complete request. This should be achievable, as the only information to check is the actual insurance of the person.

(19) To support seamless cross-border mobility, interoperability and synergies between the ESSPASS and the Electronic Exchange of Social Security Information (EESSI) system established in accordance with Regulation (EC) No 987/2009 should be explored. Where appropriate, interoperability and synergies should also be explored between the ESSPASS and other Union initiatives, including the Once-Only Technical System, the proposed European Business Wallets, the Internal Market Information (IMI) System and digital initiatives in the areas of posting of workers, pension tracking, labour law, company law, taxation and digital health.

(20) The digitalisation of the EHIC under the ESSPASS will further improve individuals' access to medically necessary healthcare during temporary stays in other Member States. This in turn will enable healthcare providers across Europe to verify insurance status swiftly and accurately, thus reducing instances of EHIC refusal and inappropriate use of the card. To facilitate faster, more accurate and more secure handling of reimbursement claims under Union social security coordination rules and improve overall efficiency, it is crucial for healthcare providers to streamline the transmission of relevant data through automated means. This should be done while complying with data protection rules and the principle of proportionality. The investments and adaptations for healthcare digital systems already provided for under the European Health Data Space should be leveraged to create synergies that maximise the efficiency of the digital healthcare systems, notably where interaction with the EUDI Wallets is envisaged in both domains.

(21) The essential data required for requesting the portable document A1 should be aligned across Member States. This is to ensure consistent verification of the facts relevant for determining the applicable legislation, which is essential to help detect incorrect declarations and fraud, as well as to reduce the administrative burden on employers posting workers. Furthermore, national portals for requesting the portable document A1 could be able to interoperate, through a streamlined technical implementation, with the public interfaces connected to the Internal Market Information System (IMI) so

[27] Directive (EU) 2016/2102 of the European Parliament and of the Council of 26 October 2016 on the accessibility of the websites and mobile applications of public sector bodies (OJ L 327, 2.12.2016, p. 1, ELI: http://data.europa.eu/eli/dir/2016/2102/oj).

[28] Directive (EU) 2019/882 of the European Parliament and of the Council of 17 April 2019 on the accessibility requirements for products and services (OJ L 151, 7.6.2019, p. 70, ELI: http://data.europa.eu/eli/dir/2019/882/oj).

that common data can be submitted only once and then re-used where possible, in line with the ‘once-only’ principle. Such possible interoperability should reduce administrative burden for businesses and also facilitate cross-border provision of services, in line with the Commission’s simplification objectives. To inform and strengthen the development work, the Commission, with Member States’ support, should also evaluate the cost-benefit ratio of the simplification and administrative burden reduction, compatibility with existing systems and alignment with ongoing and future Union initiatives, in particular any updates to the IMI regulatory framework. Any interoperability measures should be consistent with Regulation (EU) 2018/1724 and facilitate compliance with the requirements applicable to the fully online procedure and the once only principle for requesting the determination of the applicable social-security legislation.

(22) ESSPASS is intended to complement the EESSI system. While ESSPASS provides a solution for individuals and businesses to digitally interact with national authorities, this Regulation should also govern exchanges between social security institutions, especially those facilitated through the EESSI system. To ensure efficiency and consistency, the EESSI system should remain the primary means for such exchanges.

(23) A comparative study by the Administrative Commission for the coordination of social security systems has demonstrated that the processing of cross-border social security cases takes on average four times longer than comparable national cases, across all branches of social security. It is therefore essential to introduce measures to prevent unnecessary delays in the treatment of cross-border cases caused by the late exchange of data.

(24) The effective prevention and detection of errors and fraud in cross-border social security matters requires efficient information exchange and close cooperation between Member States. It is therefore necessary to lay down rules for data exchanges in cases where the EESSI system cannot be used effectively. Those rules should provide competent authorities and institutions with greater legal certainty and a robust legal basis for exchanging data to detect fraud and inaccuracies in the information underpinning rights provided for under Regulation (EC) No 883/2004, and for verifying data through cross-checking with other Member States’ authorities and institutions via electronic exchange or secure direct database access. All requests for information and responses should remain necessary and proportionate.

(25) To support the consistent implementation of this Regulation and establish a community of practice for exchanging experiences and knowledge, a group on digitalisation in social security coordination should be established, composed of two representatives of each Member State, combining technical and policy expertise on digital aspects in the social security coordination field, and representatives of the Commission. The details of its composition should be laid down in its rules of procedure. That group should also continue the work previously carried out by the Technical Commission for data processing, established pursuant to Article 73 of Regulation (EC) No 883/2004, and the ad hoc groups of the Administrative Commission for the coordination of social security systems, including the one on the ESSPASS. To ensure the effective implementation of the ESSPASS framework, which builds on the European digital identity framework, the Digitalisation Group should cooperate, when relevant, with the Administrative Commission for the coordination of social security systems and the European Digital Identity Cooperation Group.

(26) The European Labour Authority (ELA) should continue to play a crucial role in supporting Member States' efforts to digitalise cross-border social security processes. This should consist in particular in facilitating the regular exchange of good practices and experiences, promoting the effective use of digital tools, and providing capacity-building measures such as training and knowledge-sharing initiatives, to boost national authorities' digital readiness. The ELA should also continue to raise awareness among individuals, employers and other relevant stakeholders such as healthcare providers, through targeted information campaigns, guidance materials and outreach activities. This should help improve understanding and transparency regarding cross-border social security rights and obligations, and regarding the available digital tools.

(27) Any processing of personal data under this Regulation should be undertaken in accordance with Regulations (EU) 2016/679 and (EU) 2018/1725, and Directive 2002/58/EC[29]. Personal data should be processed under this Regulation only for the specific purposes set out therein and Regulations (EC) No 883/2004 and (EC) No 987/2009, without affecting further processing for archiving purposes in the public interest in accordance with Articles 5(1)(b) and 89 of Regulation (EU) 2016/679.

(28) This Regulation establishes a legal basis for the storage and processing of the data contained in the social security documents for the purposes of proving and verifying social security rights in cross-border situations. Personal data to be processed under this Regulation should be data contained in these social security documents. That personal data should concern, in particular, the information needed to digitally identify natural persons, to facilitate the faster and more accurate exercise of rights under Regulation (EC) No 883/2004, and to verify the validity and content of the information and documents exchanged. This data shall belong to the following categories of data: name, date and place of birth, address, personal identification number, professional data and health data. In applying this Regulation, that personal data will be handled by Member States' issuers and verifiers. The Regulation limits the storage period of personal data to the period strictly necessary for their verification. The measures provided for in this Regulation are proportionate, as they are strictly confined to what is required for verifying rights, managing social security cases, ensuring compliance and combating fraud. Robust safeguards – including data minimisation, access control and encryption – should be implemented in order to ensure minimal intrusion while implementing acts should specify the common data models.

(29) To ensure uniform conditions for the implementation of this Regulation, the power to adopt acts in accordance with Article 290 TFEU should be delegated to the Commission in respect of the list of social security documents for which the application of the ESSPASS framework does not provide any added value and amendments to Annex I. It is of particular importance that the Commission carry out appropriate consultations during its preparatory work, including at expert level, and that those consultations be conducted in accordance with the principles laid down in the Interinstitutional Agreement of 13 April 2016 on Better Law-Making[30]. In particular, to ensure equal participation in the preparation of delegated acts, the European Parliament and the Council receive all documents at the same time as

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[29] Directive 2002/58/EC of the European Parliament and of the Council of 12 July 2002 concerning the processing of personal data and the protection of privacy in the electronic communications sector (Directive on privacy and electronic communications) (OJ L 201, 31.7.2002, p. 37).

[30] OJ L 123, 12.5.2016, p. 1, ELI: http://data.europa.eu/eli/agree_interinstit/2016/512/oj.

Member States' experts, and their experts systematically have access to meetings of Commission expert groups dealing with the preparation of delegated acts.

(30) In order to ensure uniform conditions for the implementation of this Regulation, implementing powers should be conferred on the Commission to specify the functional and technical specifications and procedures regarding social security documents, specify the deadlines for issuing social security documents, lay down common information requirements for requesting the portable document A1, establish a common technical framework to ensure interoperability between national portals for requesting that document and the public interfaces connected to IMI for the declaration of posting of workers and drivers, specify future functional and technical specifications of the EESSI system with regard to certain areas, establish a common approach for the secure exchange of, or access to, data necessary for checks on the correct application or enforcement of Regulations (EC) No 883/2004 and (EC) No 987/2009, and specify the format and structure of the Member States' reports on the implementation of this Regulation. Those powers should be exercised in accordance with Regulation (EU) No 182/2011 of the European Parliament and of the Council[31].

(31) For reasons of clarity and consistency with this Regulation, obsolete provisions in Regulations (EC) No 883/2004 and (EC) No 987/2009 related to the governance of electronic data exchanges should be deleted. Those Regulations should therefore be amended accordingly.

(32) To allow Member States sufficient time to adapt their administrative and technical arrangements to the development of the ESSPASS, the application of the provisions concerning the ESSPASS should be deferred.

(33) The European Data Protection Supervisor was consulted in accordance with Article 42(1) of Regulation (EU) 2018/1725 [and delivered an opinion on …].

(34) Since the objectives of this Regulation, namely the establishment of a uniform, secure and interoperable digital framework for the request, issuance and cross-border verification of social security documents, as well as for the cross-border exchange of social security information, cannot be sufficiently achieved by Member States acting individually but can rather, by reason of the cross-border nature and scale of the action, be better achieved at Union level, the Union may adopt measures in accordance with the principle of subsidiarity as set out in Article 5 of the Treaty on European Union. In accordance with the principle of proportionality, as set out in that Article, this Regulation does not go beyond what is necessary to achieve its objectives.

HAVE ADOPTED THIS REGULATION:

Article 1

Subject matter

1. This Regulation sets out rules for the digitalisation of cross-border exchanges of social security information which facilitate the effective application and enforcement of Regulations (EC) No 883/2004 and (EC) No 987/2009.

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31 Regulation (EU) No 182/2011 of the European Parliament and of the Council of 16 February 2011 laying down the rules and general principles concerning mechanisms for control by the Member States of the Commission's exercise of implementing powers (OJ L 55, 28.2.2011, p. 13, ELI: http://data.europa.eu/eli/reg/2011/182/oj).

2. In particular, the Regulation lays down rules:

(a) on the establishment and operation of the European Social Security Pass (ESSPASS), as a means to digitally and timely prove and verify social security rights for individuals exercising their right to free movement and facilitate compliance for employers;

(b) on the functioning, evolution and improvement of the Electronic Exchange of Social Security Information (EESSI) system which ensures secure, standardised and interoperable data exchanges between social security institutions;

(c) on other digital cross-border exchanges of data between competent institutions necessary to combat cross-border social security fraud, as well as to detect changes in circumstances, inaccuracies, inconsistencies or errors.

3. This Regulation complements Regulations (EC) No 883/2004 and (EC) No 987/2009. It shall not affect the rights and obligations laid down in those Regulations, save where otherwise provided in this Regulation.

Article 2

Scope

This Regulation shall apply to persons falling within the scope of Regulation (EC) No 883/2004, as laid down in its Article 2, and to the branches of social security listed in Article 3(1) of that Regulation.

Article 3

Definitions

1. For the purposes of this Regulation, the definitions set out in Regulations (EC) No 883/2004 and (EC) No 987/2009 apply.

2. The following definitions also apply:

(a) ‘European Social Security Pass’ or ‘ESSPASS’ means the digital solution for the request, issuance, cross-border verification and recognition of social security documents within the Union;

(b) ‘social security document’ means any set of data (irrespective of its format), attesting to a person’s social security position, which is required for the implementation of Regulation (EC) No 883/2004 and Regulation (EC) No 987/2009;

(c) ‘European Digital Identity Wallet’ means a European Digital Identity Wallet defined in Article 3, point (42), of Regulation (EU) No 910/2014 of the European Parliament and of the Council;

(d) ‘digital social security document’ means a social security document issued by the competent institution of a Member State, which is designed to be stored, managed and shared via the European Digital Identity Wallet and verifiable electronically;

(e) ‘portable document A1’ means the social security document referred to in Article 19(2) of Regulation (EC) No 987/2009, issued by the competent institution of a Member State, attesting that its legislation applies under Title II of Regulation (EC) No 883/2004;

(f) ‘European Health Insurance Card’ or ‘EHIC’ means the social security document issued in accordance with Article 25 of Regulation (EC) No 987/2009;

(g) ‘issuer’ means any institution as defined in Article 1, point (p), of Regulation (EC) No 883/2004, or any body or authority designated, recognised or otherwise competent under the law of a Member State, which is responsible for issuing, transmitting and, where necessary, rectifying or withdrawing social security documents within the scope of Regulations (EC) No 883/2004 and (EC) No 987/2009;

(h) ‘verifier’ means any public or private entity, or natural person acting in a professional capacity, that is designated, authorised or recognised by a Member State as being entitled to verify social security documents in accordance with this Regulation.

Chapter I

European Social Security Pass

Article 4

Legal framework for the ESSPASS

1. The legal framework for the ESSPASS consists of the rules laid down in this Chapter with regard to the following:

(a) the online submission, by the persons concerned and the employers, of requests for social security documents to competent institutions of the Member States;

(b) the issuing of social security documents by the Member States’ competent institutions to the persons concerned and the employers;

(c) the electronic verification of social security documents by verifiers, to confirm their authenticity, integrity and validity.

Article 5

Scope and application of the legal framework for the ESSPASS

1. This Chapter shall apply:

(a) from [date of entry into force plus 12 months] to the portable document A1;

(b) from [date of entry into force plus 3 years] to EHIC, and to other social security documents except those identified in the delegated acts adopted pursuant to paragraph 2.

2. By [date of entry into force plus 18 months], the Commission may adopt delegated acts establishing, on the basis of an assessment, a list of social security documents, other than the portable document A1 and EHIC, for which this Chapter would not apply.

3. The assessment shall consider the following:

(c) the operational relevance of the documents concerned, having regard in particular to their frequency of issuance, the number of documents issued and potential for fraud prevention;

(d) the expected costs and benefits of digitalising the documents concerned for the exercise of social security rights and the efficient implementation of Regulations (EC) No 883/2004 and (EC) No 987/2009, including the administrative burden reduction for individuals and businesses.

Article 6

Online request procedures for social security documents

Persons concerned and, where applicable, employers, shall be able to submit requests for social security documents falling within the scope of this Regulation fully online using procedures that comply with Regulation (EU) 2018/1724. The online request procedure shall be user-friendly, accessible and comply with the following requirements:

(a) It shall enable the electronic identification and authentication of the person concerned and, where applicable, the employer;

(b) It shall allow for the electronic provision of the information, documents or supporting evidence, referred to in Article 3(2) of Regulation (EC) No 987/2009, necessary to process the request;

(c) It shall ensure that the final submission of the request can be completed remotely;

(d) It shall provide the person concerned and, where applicable, the employer with an automatic acknowledgement of receipt after the completed submission has been completed, unless the document is issued immediately;

(e) It shall notify the person concerned and, where applicable, the employer, electronically that the issuing procedure has been completed.

Article 7

Issuance, validity and verification of social security documents

1. The competent institutions shall issue digital social security documents in a format suitable for use in the European Digital Identity Wallet of the person concerned and, where relevant, of the employer. The digital social security documents shall comply with the technical specifications adopted pursuant to paragraph 11.

2. By way of derogation from paragraph 1, at the request of the person concerned or the employer, the competent institutions shall issue the social security document in a standardised and accessible physical format. Such a document shall include a QR code or other electronic features to enhance its security and shall comply with the technical specifications adopted pursuant to paragraph 11.

3. Each Member State shall communicate to the Commission a list of issuers and shall keep that list up to date. The Commission shall make those lists available to the public through a secure channel and in an electronically signed or sealed form suitable for automated processing. With regard to issuers of the portable document A1, the list shall be communicated to the Commission by [date of entry into force plus 12 months]. Member States shall communicate the list of issuers of EHIC and other social security documents falling within the scope of this Chapter by [date of entry into force plus 3 years].

4. Before issuing a social security document, the issuers shall verify the accuracy of the information provided by the persons concerned and, where applicable, by the employers in support of their request, including by means of digital tools.

5. Where a social security document referred to in paragraph 1 or paragraph 2 is revoked, the issuer shall immediately notify the person concerned and, where applicable, the employer. Notification shall be made by electronic means, except if other means are indicated by both the person concerned and, where applicable, the employer.

6. The issuers shall ensure that a person is able to receive and store, within their own European Digital Identity Wallet, the digital social security documents of their minor children and of a natural person whom they legally represent.

7. Social security documents issued under paragraphs 1 and 2 by one Member State shall be recognised by verifiers in all Member States.

   Where a document issued in accordance with this Regulation has been verified, its validity or authenticity shall not be subject to further proof requirements in the host Member State. This paragraph shall be without prejudice to the procedures applicable in the event of doubt or dispute under Regulations (EC) No 883/2004 and (EC) No 987/2009.

8. Member States shall ensure that verifiers established on their territory are equipped with the necessary technical means to verify the social security documents issued under this Article, regardless of the format, in order to confirm their authenticity, integrity and validity. They shall be able to verify that:

   (a) the document was issued by an authorised institution;

   (b) the data contained in the document have not been tampered with since it was issued;

(c) the document has not expired or been revoked.

9. Personal data processed for the purposes of verifying the concerned person's social security document shall not be retained by the verifier after the verification is complete, unless it is necessary to apply Regulations (EC) No 883/2004 and (EC) No 987/2009, or authorised by other Union or national legal act in accordance with Regulation (EU) 2016/679 or Directive (EU) 2016/680[32].

10. ESSPASS shall be interoperable with the EESSI system and, where appropriate, with other relevant Union digital initiatives, including the European Health Data Space and the Once-Only Technical system.

11. The Commission shall adopt implementing acts specifying the functional and technical specifications regarding the documents referred to in paragraphs 1 and 2. Those implementing acts shall include:

(a) the technical and interoperability specifications, including common data models establishing the data to be processed, standards and accessibility requirements;

(b) the procedures for requesting, issuing, revoking and verifying documents, including aspects related to the lists of issuers in accordance with paragraph 3 of this Article;

(c) the technical and organisational security measures, including encryption and access control measures;

(d) the organisational measures for processing and protecting personal data, including with regard to the retention periods, and the roles of controllers and processors in accordance with Regulation (EU) 2016/679.

Those implementing acts shall be adopted in accordance with the examination procedure referred to in Article 17(2).

Article 8

Deadlines for issuing social security documents

1. Competent institutions shall issue social security documents to the person concerned and, where applicable, the employer in compliance with the deadlines established in accordance with paragraphs 2 and 3.

2. By [date of entry into force plus 18 months], the Commission shall adopt implementing acts specifying the deadlines for issuing social security documents

[32] Directive (EU) 2016/680 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data by competent authorities for the purposes of the prevention, investigation, detection or prosecution of criminal offences or the execution of criminal penalties, and on the free movement of such data, and repealing Council Framework Decision 2008/977/JHA (OJ L 119, 4.5.2016, p. 89, ELI: http://data.europa.eu/eli/dir/2016/680/oj).

under the scope of this Chapter, calculated from the submission of a complete request.

3. By way of derogation from paragraph 2, the implementing act specifying the deadline for issuing the portable document A1 shall be adopted by [date of entry into force plus 12 months].

4. For the issuance of the European Health Insurance Card, the maximum deadline shall not exceed 24 hours.

5. When specifying the deadlines, the Commission shall take into account the following:

   (a) the type of social security document requested;

   (b) the procedural steps required for verifying the information provided before issuing the requested social security document, including where relevant the necessary exchanges of information between competent institutions;

   (c) the need to ensure the timely exercise of rights under Regulation (EC) No 883/2004.

   Those implementing acts shall be adopted in accordance with the examination procedure referred to in Article 17(2).

6. Upon receipt of the request, the issuer shall inform the persons concerned or the employers, as applicable, of the expected time required to process their request and of the applicable deadlines laid down in the implementing acts adopted pursuant to paragraph 2.

Article 9

European Health Insurance Cards

1. From [date of entry into force plus 3 years], all newly issued European Health Insurance Cards shall comply with the requirements laid down in Article 7. European Health Insurance Cards already in circulation which have not yet expired at that date shall be replaced no later than [date of entry into force plus 5 years].

2. From [date of entry into force plus 3 years], Member States shall ensure that healthcare providers on their territory are able to transmit electronically the data contained in the European Health Insurance Card of a patient from another Member State, and all the data that need to be transmitted for the reimbursement process, to the competent institutions of the Member State of treatment.

Article 10

Portable document A1

1. By [date of entry into force plus 12 months], the Commission shall adopt implementing acts establishing common information requirements for requesting the

portable document A1, not exceeding what is necessary to determine the applicable legislation and with due regard to administrative burden reduction.

2. The Commission shall establish, by means of implementing acts, a common technical framework to ensure interoperability between national portals used to request the portable document A1 and the public interfaces connected to the Internal Market Information System[33] for the declaration of posting of workers and for the posting of drivers in road transport, as provided for in Article 1(11) of Directive (EU) 2020/1057. That technical framework shall enable the reuse of relevant submitted data across the procedures for the request of the portable document A1 and the submission of posting declarations, in compliance with Regulations (EU) 2016/679 and (EU) 2018/1725 and the once-only principle.

3. The implementing acts referred to in paragraphs 1 and 2 shall be adopted in accordance with the examination procedure referred to in Article 17(2).

Chapter II

Exchanges between institutions

Article 11

Exchanges through the EESSI system

1. Member States shall exchange, access and process the data required to apply Regulations (EC) No 883/2004 and (EC) No 987/2009 via the EESSI system in accordance with the functional and technical specifications as laid down pursuant to Article 78 of Regulation (EC) No 987/2009.

2. When exchanging the data via the EESSI system, Member States shall comply with the maximum time periods laid down in Annex I to this Regulation.

3. The Commission is empowered to adopt delegated acts in accordance with Article 16 in order to amend Annex I, taking into account the following:

   (a) the business use cases and the structured electronic documents involved in the exchange;

   (b) the procedural steps required for gathering the information, including where relevant the necessary exchanges of information between competent institutions at the national level;

   (c) the need to ensure the timely exercise of rights under Regulation (EC) No 883/2004.

33 Regulation (EU) No 1024/2012 of the European Parliament and of the Council of 25 October 2012 on administrative cooperation through the Internal Market Information System and repealing Commission Decision 2008/49/EC (‘the IMI Regulation’) (OJ L 316, 14.11.2012, p. 1, ELI: http://data.europa.eu/eli/reg/2012/1024/oj).

4. For the purposes of personal data processing within the EESSI system, the Commission shall be considered a processor as defined in Article 3, point (12), of Regulation (EU) 2018/1725 and Member States' joint controllers as referred to in Article 26 of Regulation (EU) 2016/679.

5. The Commission shall further specify, by way of implementing acts, the functional and technical specifications of the EESSI system with regard to the following areas:

   (a) the business use cases and the structure, format, content and data models of the information exchanged;

   (b) the procedural and technical rules for data exchanges;

   (c) the roles and responsibilities of the bodies involved in the exchanges;

   (d) business continuity measures;

   (e) security and data protection measures;

   (f) operational and support measures;

   (g) the details of the public database containing the information specified in Article 88(4) of Regulation (EC) No 987/2009;

   (h) the service levels.

Those implementing acts shall be adopted in accordance with the examination procedure referred to in Article 17(2).

Article 12

Electronic exchange of information outside the EESSI system

1. By way of derogation from Article 11(1), where the exchange of data necessary for controls on the correct application or enforcement of Regulations (EC) No 883/2004 and (EC) No 987/2009, including for the purposes of detecting changes in circumstances, inaccuracies, inconsistencies, fraud and error, cannot be effectively carried out through the EESSI system, such data, or secure access to such data may be provided outside the EESSI system, in accordance with the common procedures and specifications established pursuant to paragraph 2.

2. The Commission shall, where applicable, adopt implementing acts to establish common procedures and functional and technical specifications for the secure exchange of data or access to data referred to in paragraph 1.

3. The implementing acts may include the following:

   (a) arrangements concerning the categories of data to be exchanged or made accessible and the role and responsibility of the bodies involved in the exchanges;

   (b) the means of exchange or access;

   (c) standard formats or structures;

   (d) measures ensuring the security, integrity and reliability of the exchange or access.

Those implementing acts shall be adopted in accordance with the examination procedure referred to in Article 17(2).

Chapter III

Governance and data processing

Article 13

Digitalisation Group

1. A group on digitalisation in social security coordination (the ‘Digitalisation Group’) is established to facilitate cross-border cooperation on the digital aspects of the coordination of social security systems set out in this Regulation.
2. The Digitalisation Group shall be made up of two government representatives from each of the Member States, assisted, where necessary, by expert advisers. Representatives of the European Commission shall also attend the meetings of the Digitalisation Group. The Group shall be chaired by the Commission, which shall also provide its secretariat.
3. The Digitalisation Group shall have the following tasks:
   (a) support the consistent implementation of this Regulation by facilitating coordination, the exchange of information and the promotion of best practices across Member States and developing guidelines to support enforcement of this Regulation;
   (b) provide recommendations to the committee referred to in Article 17, where appropriate, on further digitalisation of the coordination of social security systems;
   (c) support the development and operation of electronic data exchanges in accordance with this Regulation;
   (d) advise the Commission, as appropriate, in the early preparations of draft implementing acts to be adopted pursuant to this Regulation.
4. The Digitalisation Group shall cooperate, when relevant, with the Administrative Commission for the coordination of social security systems referred to in Title IV of Regulation (EC) No 883/2004 and with the European Digital Identity Cooperation Group referred to in Article 46e of Regulation (EU) No 910/2014.
5. The Digitalisation Group shall adopt its rules of procedure.

Article 14

Monitoring and reporting

1. Member States shall collect the data necessary for monitoring the implementation of Article 8(1) and Article 11(2) and shall transmit those data to the Commission quarterly, by the end of the month following each calendar quarter. The Commission shall publish statistics based on the data collected.

2. The Commission shall adopt implementing acts specifying the format and structure of the reports referred to in paragraph 1. Those implementing acts shall be adopted in accordance with the examination procedure referred to in Article 17(2).

Article 15

Protection and processing of personal data

1. Personal data required for the application of this Regulation shall be processed by Member States' issuers and verifiers for the purposes of issuing and verifying of social security documents as defined by implementing acts adopted under the present Regulation. In particular, personal data shall be processed under this Regulation for the purposes of:

   (a) issuing social security documents;

   (b) determining social security rights of documents' holders;

   (c) verifying the validity of social security documents and information contained therein.

2. Personal data to be processed pursuant to this Regulation shall be those contained in the social security documents handled, for the purposes referred to in paragraph 1 by Member States' issuers and verifiers. Processing of personal data under this Regulation shall be limited to the extent necessary for the purposes set out in paragraph 1, without affecting further processing for archiving purposes in the public interest in accordance with Article 5(1), point (b) and Article 89 of the Regulation (EU) 2016/679.

3. For the purposes of this Regulation, Member States' issuers of social security documents under the ESSPASS framework shall be regarded as controllers within the meaning of Article 4(7) of the Regulation (EU) 2016/679. Controllers shall ensure the security, integrity, authenticity and confidentiality of the data processed for the purposes set out in paragraph 1.

Chapter IV

Final provisions

Article 16

Exercise of the delegation

1. The power to adopt delegated acts is conferred on the Commission subject to the conditions laid down in this Article.

2. The power to adopt delegated acts referred to in Articles 5(2) and 11(3) shall be conferred on the Commission for an indeterminate period of time from [the date of entry into force of this Regulation].

3. The delegation of power referred to in Articles 5(2) and 11(3) may be revoked at any time by the European Parliament or by the Council. A decision to revoke shall put an end to the delegation of the power specified in that decision. It shall take effect the day following the publication of the decision in the *Official Journal of the European Union* or at a later date specified therein. It shall not affect the validity of any delegated acts already in force.

4. Before adopting a delegated act, the Commission shall consult experts designated by each Member State in accordance with the principles laid down in the Interinstitutional Agreement of 13 April 2016 on Better Law-Making.

5. As soon as it adopts a delegated act, the Commission shall notify it simultaneously to the European Parliament and to the Council.

6. A delegated act adopted pursuant to Articles 5(2) and 11(3) shall enter into force only if no objection has been expressed either by the European Parliament or by the Council within a period of [two months] of notification of that act to the European Parliament and the Council or if, before the expiry of that period, the European Parliament and the Council have both informed the Commission that they will not object. That period shall be extended by [two months] at the initiative of the European Parliament or of the Council.

Article 17

Committee

1. The Commission shall be assisted by a committee within the meaning of Regulation (EU) No 182/2011.

2. Where reference is made to this paragraph, Article 5 of Regulation (EU) No 182/2011 shall apply.

Article 18

Evaluation

1. By [seven years after the date of entry into force], the Commission shall evaluate the implementation and effectiveness of this Regulation.

2. The evaluation shall assess, in particular, whether the objectives of this Regulation have been achieved and whether its provisions remain relevant, effective, efficient, coherent and proportionate.

3. The Commission shall submit a report on the findings of the evaluation to the European Parliament and the Council. The report shall be made publicly available.

Article 19

Amendments to Regulation (EC) No 883/2004

1. Regulation (EC) No 883/2004 is amended as follows:

   (1) in Article 72, point (d) is deleted;

   (2) Article 73 is deleted.

2. Decisions of the Administrative Commission concerning digital aspects, adopted under Article 72, point (d) of Regulation (EC) No 883/2004, shall continue to serve as guidance until the implementing acts provided for in this Regulation enter into force. The Technical Commission on social security coordination referred to in Decision H15 shall continue to work until the adoption of the rules of procedure of the Digitalisation Group pursuant to Article 13(5).

Article 20

Amendments to Regulation (EC) No 987/2009

Article 4 of Regulation (EC) No 987/2009 is amended as follows:

(1) paragraph 1 is deleted;

(2) in paragraph 3, the second sentence is deleted.

Article 21

Amendments to Regulation (EU) 2018/1724

Annex II to Regulation (EU) 2018/1724 is amended as follows:

In the table, the following row is inserted after the row 'Retiring':

Exercising social security rights	Applications, requests and notifications relating to the exercise of social security rights under Regulation [ESSPASS Proposal].	Confirmation of applications, requests and notifications relating to the exercise of social security rights, as well as all outputs pertaining to the procedures under Regulation [ESSPASS Proposal].

Article 22

Entry into force

This Regulation shall enter into force on the twentieth day following that of its publication in the *Official Journal of the European Union*.

This Regulation shall be binding in its entirety and directly applicable in all Member States.

Done at Strasbourg,

For the European Parliament *The President*	*For the Council* *The President*

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1. FRAMEWORK OF THE PROPOSAL/INITIATIVE

1.1. Title of the proposal/initiative

Proposal for a Regulation of the European Parliament and of the Council on digitalising the coordination of social security systems, laying down a framework for the European Social Security Pass (ESSPASS) and amending Regulations (EC) No 883/2004, (EC) No 987/2009 and (EU) No 2018/1724

1.2. Policy area(s) concerned

People, society and social model, Free movement of persons, labour mobility

Access to services

Digitalisation of public administrations

1.3. Objective(s)

1.3.1. General objective(s)

The initiative aims to promote fair mobility within the EU, facilitating access to social security rights for all individuals - in line with the European Pillar of Social Rights and the single market strategy. It supports the Union's cross-cutting objectives of simplification and reduction of administrative hurdles through digitalised cross-border public services.

1.3.2. Specific objective(s)

The specific objectives of the initiative are:

(1) Cross-border social security cases requiring the proof and verification of social security rights and insurance status are handled with reduced manual intervention and streamlined administrative steps, leading to faster and more consistent processing.

(2) Cross-border interoperability is strengthened through converged documents' formats, data models and verification methods across the EU, enabling seamless exchange of information and reducing fraud.

(3) Individuals experience improved accessibility, awareness, and control over their cross-border social security rights and data.

Individuals experience improved accessibility, awareness, and control over their cross-border social security rights and data.

1.3.3. Expected result(s) and impact

The initiative is expected to reinforce the social security coordination framework, by improving rules' application and making their implementation simpler, more efficient, and resistant to fraud.

It will increase the transparency and accessibility of rights for individuals, while helping reduce fraudulent and exploitative practices. It is also anticipated to assist businesses, making it easier for them to carry out activities across borders, and to support national authorities by simplifying processes and enhancing cooperation. The initiative will drive the digitalisation of cross-border public services, ultimately contributing to a better competitiveness of the EU economy.

1.3.4. *Indicators of performance*

A comprehensive draft monitoring framework has been designed to monitor the implementation and evaluate the initiative's impact, ensuring that it remains fit for purpose and achieve the intended objectives. This framework will undergo further refinement based on the ultimate legal specifications and implementation schedule.

Indicators includes:

1) Percentage of procedures fully available online
2) Percentage of documents issued electronically
3) Percentage of compliant national authorities
4) Number of complaints by businesses and individuals on cases exceeding the deadlines
5) Proportion of documents processed automatically across Member States
6) Reduction in processing time to issue and verify documents
7) Number of rejected healthcare reimbursement invoices
8) Reduction in the cases of falsified portable documents and inappropriate use of EHIC
9) Percentage of users satisfied with the solution and awareness rating
10) Time of completion of users' requests (reducing average time, reducing difference between minimum and maximum time needed between Member States)
11) Number of cross-border verifications completed successfully (transaction volume, increasing)
12) Cybersecurity indices of data safety.

A comprehensive draft monitoring framework has been designed to monitor the implementation and evaluate the initiative's impact, ensuring that it remains fit for purpose and achieve the intended objectives. This framework will undergo further refinement based on the ultimate legal specifications and implementation schedule.

Indicators includes:

Percentage of procedures fully available online

Percentage of documents issued electronically

Percentage of compliant national authorities

Number of complaints by businesses and individuals on cases exceeding the deadlines

Proportion of documents processed automatically across Member States

Reduction in processing time to issue and verify documents

Number of rejected healthcare reimbursement invoices

Reduction in the cases of falsified portable documents and inappropriate use of EHIC

Percentage of users satisfied with the solution and awareness rating

Time of completion of users' requests (reducing average time, reducing difference between minimum and maximum time needed between Member States)

Number of cross-border verifications completed successfully (transaction volume, increasing)

Cybersecurity indices of data safety.

1.4. The proposal/initiative relates to:

☐ a new action

☐ a new action following a pilot project / preparatory action[34]

☒ the extension of an existing action

☐ a merger or redirection of one or more actions towards another/a new action

1.5. Grounds for the proposal/initiative

1.5.1. Requirement(s) to be met in the short or long term including a detailed timeline for roll-out of the implementation of the initiative

The main requirement for the short-term is to reach an agreement on the legislative proposal by co-legislators by Q3 2027.

The proposal provides for the adoption of implementing acts.

1.5.2. Added value of EU involvement (it may result from different factors, e.g. coordination gains, legal certainty, greater effectiveness or complementarities). For the purposes of this section 'added value of EU involvement' is the value resulting from EU action, that is additional to the value that would have been otherwise created by Member States alone.

Action at the EU level delivers significant added value by supporting the free movement of people for study, travel, residency, family or business purposes. Given the cross-border nature of the identified issues, only EU-level intervention rather than individual Member State efforts can effectively solve these. An action at EU level will ensure alignments with other EU digital initiatives, such as the Single Digital Gateway Regulation and the European Digital Identity framework, ensuring

[34] As referred to in Article 58(2), point (a) or (b) of the Financial Regulation.

the necessary efficiency and. EU-level action prevents fragmentation that could arise if Member States develop disparate digital solutions, leading to suboptimal outcomes and potentially higher costs to remedy.

1.5.3. Lessons learned from similar experiences in the past

One of the key considerations in estimating the budgetary requirements for this initiative has been the valuable lessons learned from past experiences, particularly those derived from the implementation of the Electronic Exchange of Social Security Information (EESSI) system. The financial projections take into account the operational and technical support necessary for Member States' national implementation, ensuring that adequate resources are allocated. Additionally, insights gained from the ESSPASS pilot activities have provided a clearer understanding of the scope of effort and resource allocation.

1.5.4. Compatibility with the multiannual financial framework and possible synergies with other appropriate instruments

The proposal is compatible with the multiannual financial framework.

It is part of the Fair labour mobility package, it supports the European pillar of social rights and the Digital decade policy programme.

1.5.5. Assessment of the different available financing options, including scope for redeployment

The implementation of this legislative proposal requires the organisation of meetings with Member States in the Group on digitalisation in social security coordination and in the Committee supporting the adoption of implementing acts as well as human resources to support Member States' national implementation. The necessary expenditure for organising these meetings, i.e. travel costs of delegates, and providing this support is covered by the general budget.

1.6. **Duration of the proposal/initiative and of its financial impact**

☐ **limited duration**

- ☐ in effect from [DD/MM]YYYY to [DD/MM]YYYY
- ☐ financial impact from YYYY to YYYY for commitment appropriations and from YYYY to YYYY for payment appropriations.

✠ **unlimited duration**

(1) Implementation with a start-up period from 2026 to 2030,

(2) followed by full-scale operation.

1.7. **Method(s) of budget implementation planned**

✠ **Direct management** by the Commission

- ✠ by its departments, including by its staff in the Union delegations;
- ☐ by the executive agencies

☐ **Shared management** with the Member States

☐ **Indirect management** by entrusting budget implementation tasks to:

- ☐ third countries or the bodies they have designated
- ☐ international organisations and their agencies (to be specified)
- ☐ the European Investment Bank and the European Investment Fund
- ☐ bodies referred to in Articles 70 and 71 of the Financial Regulation
- ☐ public law bodies
- ☐ bodies governed by private law with a public service mission to the extent that they are provided with adequate financial guarantees
- ☐ bodies governed by the private law of a Member State that are entrusted with the implementation of a public-private partnership and that are provided with adequate financial guarantees
- ☐ bodies or persons entrusted with the implementation of specific actions in the common foreign and security policy pursuant to Title V of the Treaty on European Union, and identified in the relevant basic act
- ☐·bodies established in a Member State, governed by the private law of a Member State or Union law and eligible to be entrusted, in accordance with sector-specific rules, with the implementation of Union funds or budgetary guarantees, to the extent that such bodies are controlled by public law bodies or by bodies governed by private law with a public service mission, and are provided with adequate financial guarantees in the form of joint and several liability by the controlling bodies or equivalent financial guarantees and which may be, for each action, limited to the maximum amount of the Union support.

Comments

From 2028 onwards, a modest but ongoing financial requirement will arise. This will need to be accounted for in the preparation of the post-2027 MFF (2028-2034), ensuring adequate allocation for continued implementation support.

The estimated impact on expenditure and staffing for 2028 and beyond is added for illustrative purposes only and does not pre-judge the next Multiannual Financial Framework. The source of financing and scope of Union financial commitment in the post-2027 period remain subject to the outcome of interinstitutional negotiations on the MFF 2028-2034 and thereafter shall be determined through the annual budgetary procedure. All appropriations and staffing allocations as of 2028 are indicative.

2. MANAGEMENT MEASURES

2.1. Monitoring and reporting rules

The proposed Regulation establishes a reporting obligation for Member States to ensure transparency and accountability in the implementation of provisions related to deadlines to issue social security documents and to exchange data through the Electronic Exchange of Social Security system.

2.2. Management and control system(s)

2.2.1. Justification of the budget implementation method(s), the funding implementation mechanism(s), the payment modalities and the control strategy proposed

Direct management, as per Article 62.1(a) of the Financial Regulation, is the preferred mode of implementation, as the actions will be carried out by the European Commission, specifically Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL), which will ensure the coordination with Member States and the various stakeholders.

2.2.2. Information concerning the risks identified and the internal control system(s) set up to mitigate them

The controls are part of the internal control system of DG EMPL. The new activities will be subject to the same risk identification and mitigation approach.

2.2.3. Estimation and justification of the cost-effectiveness of the controls (ratio between the control costs and the value of the related funds managed), and assessment of the expected levels of risk of error (at payment & at closure)

The controls are integrated into the internal control system of DG EMPL. The new activities will generate negligeable additional control costs at DG level.

2.3. Measures to prevent fraud and irregularities

The Commission shall ensure that, when actions financed are implemented, the financial interests of the Union are protected by the application of preventive measures against fraud, corruption and any other illegal activities, by effective checks and by the recovery of the amounts unduly paid and, if irregularities are detected, by effective, proportional and dissuasive penalties. The Commission is authorised to carry out checks and verifications in situ under this Decision, in compliance Council Regulation (Euratom, EC) No 2185/96 of 11 November 1996 concerning on-the-spot checks and inspections carried out by the Commission in order to protect the European Communities financial interests against fraud and other irregularities. If need be, investigations shall be carried out by the European Anti-Fraud Office and shall be governed by Regulation (EC) No 1073/1999 of the European Parliament and of the Council of 25 May 1999 concerning investigations conducted by the European Anti-Fraud Office.

3. ESTIMATED FINANCIAL IMPACT OF THE PROPOSAL/INITIATIVE

3.1. Heading(s) of the multiannual financial framework and expenditure budget line(s) affected

– Existing budget lines

In order of multiannual financial framework headings and budget lines.

Heading of multiannual financial framework	Budget line	Type of expenditure	Contribution			
	Number Headings 2	Non-diff[35].	from EFTA countries [36]	from candidate countries and potential candidates [37]	From other third countries	other assigned revenue
2	Prerogatives - Free movement of workers, coordination of social security schemes and measures for migrants, including migrants from third countries	diff.	YES/~~NO~~	~~YES/~~NO	YES/~~NO~~	NO

35 Diff. = Differentiated appropriations / Non-diff. = Non-differentiated appropriations.

36 EFTA: European Free Trade Association.

37 Candidate countries and, where applicable, potential candidates from the Western Balkans.

3.2. Estimated financial impact of the proposal on appropriations

3.2.1. Summary of estimated impact on operational appropriations

(3) ☐ The proposal/initiative does not require the use of operational appropriations

(1) ⌧☐ The proposal requires the use of operational appropriations, as explained below

3.2.1.1. Appropriations from voted budget

EUR million (to three decimal places)

DG: EMPL			Year **2028**	Year **2029**	Year **2030**	Year **2031**	Year **2032**	Year **2033**	Year **2034**	**TOTAL MFF 2028-2034**
Operational appropriations										
Budget line Prerogatives – Free movement of workers, coordination of social security schemes and measures for migrants, including migrants from third countries	Commitments	(1a)	0.750	0.750	0.750	0.750	0.750	0.750	0.750	**5,25**
	Payments	(2a)	0.750	0.750	0.750	0.750	0.750	0.750	0.750	**5,25**
Budget line	Commitments	(1b)								**0**
	Payments	(2b)								**0**
Appropriations of an administrative nature financed from the envelope of specific programmes[38]										
Budget line		(3)								**0**
TOTAL appropriations for DG EMPL	Commitments	=1a+1b+3	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5.25**
	Payments	=2a+2b+3	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5.25**

38 Technical and/or administrative assistance and expenditure in support of the implementation of EU programmes and/or actions (former ‘BA’ lines), indirect research, direct research.

			Year 2028	Year 2029	Year 2030	Year 2031	Year 2032	Year 2033	Year 2034	TOTAL MFF 2028-2034
TOTAL operational appropriations	Commitments	(4)	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5,25**
	Payments	(5)	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5,25**
TOTAL appropriations of an administrative nature financed from the envelope for specific programmes		(6)	0	0	0	0	0	0	0	**0**
TOTAL appropriations under HEADING 2	Payments	=4+6	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5,25**
of the multiannual financial framework		=5+6	**0.750**	**0.750**	**0.750**	**0.750**	**0.250**	**0.250**	**0.250**	**5.25**

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			Year 2028	Year 2029	Year 2030	Year 2031	Year 2032	Year 2033	Year 2034	TOTAL MFF 2028-2034
• TOTAL operational appropriations (all operational headings)	Commitments	(4)	0	0	0	0	0	0	0	**0**
	Payments	(5)	0	0	0	0	0	0	0	**0**
• TOTAL appropriations of an administrative nature financed from the envelope for specific programmes (all operational headings)		(6)	0	0	0	0	0	0	0	**0**
TOTAL appropriations Under Heading 1 to 3	Commitments	=4+6	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5,25**

of the multiannual financial framework (Reference amount)	Payments	=5+6	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**0.750**	**5,25**

The estimated impact on expenditure and staffing for 2028 and beyond is added for illustrative purposes only and does not pre-judge the next Multiannual Financial Framework. The source of financing and scope of Union financial commitment in the post-2027 period remain subject to the outcome of interinstitutional negotiations on the MFF 2028-2034 and thereafter shall be determined through the annual budgetary procedure. All appropriations and staffing allocations as of 2028 are indicative.

Heading of multiannual financial framework 2028 -2034	4	'Administrative expenditure'[39]

DG: EMPL		Year **2028**	Year **2029**	Year **2030**	Year **2031**	Year **2032**	Year **2033**	Year **2034**	**TOTAL MFF 2028-2034**
• Human resources		0,299	0,299	0,299	0,299	0,299	0,299	0,299	**2,093**
• Other administrative expenditure, Budget line 20.020602		0, 164	0, 164	0.164	0,164	0,164	0,164	0,164	**1,148**
TOTAL DG EMPL	Appropriations	**0,463**	**0,463**	**0,463**	**0,463**	**0,463**	**0,463**	**0,463**	**3,241**

DG: EMPL	Year	Year	Year	Year	Year	Year	Year	**TOTAL MFF 2028-2034**
• Other administrative expenditure	0	0	0	0	0	0	0	**0**

39 The necessary appropriations should be determined using the annual average cost figures available on the appropriate BUDGpedia webpage.

TOTAL appropriations under HEADING 4 of the multiannual financial framework	(Total commitments = Total payments)	**0,463**	**0,463**	**0,463**	**0,463**	**0,463**	**0,463**	**0,463**	**3,241**

EUR million (to three decimal places)

		Year **2028**	Year **2029**	Year **2030**	Year **2031**	Year **2032**	Year **2033**	Year **2034**	**TOTAL MFF 2028-2034**
TOTAL appropriations under HEADINGS 1 to 4	Commitments	**1,213**	**1,213**	**1,213**	**1,213**	**1,213**	**1,213**	**1,213**	**8,491**
of the multiannual financial framework	Payments	**1,213**	**1,213**	**1,213**	**1,213**	**1,213**	**1,213**	**1,213**	**8,491**

The estimated impact on expenditure and staffing for 2028 and beyond is added for illustrative purposes only and does not pre-judge the next Multiannual Financial Framework. The source of financing and scope of Union financial commitment in the post-2027 period remain subject to the outcome of interinstitutional negotiations on the MFF 2028-2034 and thereafter shall be determined through the annual budgetary procedure. All appropriations and staffing allocations as of 2028 are indicative.

3.2.2. Estimated output funded from operational appropriations (not to be completed for decentralised agencies)

Indicate objectives and outputs			Year **2028**	Year **2029**	Year **2030**	Year **2031**	Enter as many years as necessary to show the duration of the impact (see Section1.6)	**TOTAL**
	OUTPUTS							

⇩	Type[40]	Average cost	No	Cost	No	Cost	No	Cost	No	Cost	No	Cost	No	Cost	No	Cost	Total No	Total cost
SPECIFIC OBJECTIVE No 1,2 and 3[41]…																		
- Output	Consult		1	0.750	1	0.750	1	0.750	1	0.750	1	0.750	1	0.750	1	0.750	7	5.25
- Output																		
- Output																		
Subtotal for specific objective No 1																		
SPECIFIC OBJECTIVE No 2 …																		
- Output																		
Subtotal for specific objective																		
TOTALS																	7	5.25

40 Outputs are products and services to be supplied (e.g. number of student exchanges financed, number of km of roads built, etc.).
41 As described in Section 1.3.2. 'Specific objective(s)'

3.2.3. Summary of estimated impact on administrative appropriations

(2) ☐ The proposal/initiative does not require the use of appropriations of an administrative nature

☒The proposal/initiative requires the use of appropriations of an administrative nature, as explained below

3.2.3.3. Total appropriations

VOTED APPROPRIATIONS	Year 2028	Year 2029	Year 2030	Year 2031	Year 2032	Year 2033	Year 2034	TOTAL 2028 - 2034
HEADING 4								
Human resources	0.299	0.299	0.299	0.299	0.299	0.299	0.299	**2,093**
Other administrative expenditure	0.164	0.164	0.164	0.164	0.164	0.164	0.164	**1.148**
Subtotal HEADING 4	**0.463**	**0.463**	**0.463**	**0.463**	**0.463**	**0.463**	**0.463**	**3,241**
Outside HEADING 4								
Human resources	0.000	0.000	0.000	0.000	0.000	0.000	0.000	**0,000**
Other expenditure of an administrative nature	0.000	0.000	0.000	0.000	0.000	0.000	0.000	**0.000**
Subtotal outside HEADING 4	**0.000**	**0.000**	**0.000**	**0.000**	**0.000**	**0.000**	**0.000**	**0.000**
TOTAL	**0. 463**	**0. 463**	**0. 463**	**0. 463**	**0. 463**	**0. 463**	**0. 463**	**3,241**

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The estimated impact on expenditure and staffing for 2028 and beyond is added for illustrative purposes only and does not pre-judge the next Multiannual Financial Framework. The source of financing and scope of Union financial commitment in the post-2027 period remain subject to the outcome of interinstitutional negotiations on the MFF 2028-2034 and thereafter shall be determined through the annual budgetary procedure. All appropriations and staffing allocations as of 2028 are indicative.

3.2.4. Estimated requirements of human resources

(1) ☐ The proposal/initiative does not require the use of human resources

(2) ☒ The proposal/initiative requires the use of human resources, as explained below

3.2.4.1. Financed from voted budget

VOTED APPROPRIATIONS	Year 2028	Year 2029	Year 2030	Year 2031	Year 2032	Year 2033	Year 2034
• Establishment plan posts (officials and temporary staff)							
20 01 02 01 (Headquarters and Commission's Representation Offices)	1	1	1	1	1	1	1

20 01 02 03 (EU Delegations)	0	0	0	0	0	0	0
(Indirect research)	0	0	0	0	0	0	0
(Direct research)	0	0	0	0	0	0	0
Other budget lines (specify)	0	0	0	0	0	0	0
• **External staff (in FTEs)**							
20 02 01 (AC, END from the 'global envelope')	1	1	1	1	1	1	1
20 02 03 (AC, AL, END and JPD in the EU Delegations)	0	0	0	0	0	0	0
Admin. Support line [XX.01.YY.YY] – • at Headquarters	0	0	0	0	0	0	0
Admin. Support line [XX.01.YY.YY] – • in EU Delegations	0	0	0	0	0	0	0
(AC, END - Indirect research)	0	0	0	0	0	0	0
(AC, END - Direct research)	0	0	0	0	0	0	0
Other budget lines - Heading 4	0	0	0	0	0	0	0
Other budget lines - 07.200301 - Outside Heading 4	0	0	0	0	0	0	0
TOTAL	**2**	**2**	**2**	**2**	**2**	**2**	**2**

The human resources required will be met by staff from the DG who are already assigned to management of the action and/or have been redeployed within the DG, together if necessary, with any additional allocation which may be granted to the managing DG under the annual allocation procedure and in the light of budgetary constraints.

The staff required to implement the proposal (in FTEs):

	To be covered by current staff available in the Commission services	**Exceptional additional staff***		
		To be financed under Heading 7 or Research	**To be financed from BA line**	**To be financed from fees**
Establishment plan posts	1	N/A	N/A	N/A
External staff (CA, SNEs, INT)	1	N/A	N/A	N/A

Description of tasks to be carried out by:

Officials and temporary staff	1 AD will support the negotiation, prepare the implementing acts, organise meeting with Member States.
External staff	1 external staff will support the official in charge

3.2.5. *Overview of estimated impact on digital technology-related investments*

There are no digital and IT costs under Heading 4.

TOTAL Digital and IT appropriations	Year 2028	Year 2029	Year 2030	Year 2031	Year 2032	Year 2033	Year 2034	TOTAL MFF 2028 - 2034
HEADING 4								
IT expenditure (corporate)	0	0	0	0	0	0	0	**0**
Subtotal HEADING 4	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
Outside HEADING 4								
Policy IT expenditure on operational programmes	0	0	0	0	0	0	0	**0**
Subtotal outside HEADING 4	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
TOTAL	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

3.2.6. *Compatibility with the current multiannual financial framework*

The proposal/initiative:

(9) ✠ can be fully financed through redeployment within the relevant heading of the multiannual financial framework (MFF)

.

The estimated impact on expenditure and staffing for 2028 and beyond is added for illustrative purposes only and does not pre-judge the next Multiannual Financial Framework. The source of financing and scope of Union financial commitment in the post-2027 period remain subject to the outcome of interinstitutional negotiations on the MFF 2028-2034 and thereafter shall be determined through the annual budgetary procedure. All appropriations and staffing allocations as of 2028 are indicative.

(10) ☐ requires use of the unallocated margin under the relevant heading of the MFF and/or use of the special instruments as defined in the MFF Regulation

(11) ☐ requires a revision of the MFF

3.2.7. Third-party contributions

The proposal/initiative:

(12) ☐ does not provide for co-financing by third parties

(13) ☐ provides for the co-financing by third parties estimated below:

Appropriations in EUR million (to three decimal places)

	Year **2028**	Year **2029**	Year **2030**	Year **2031**	Year **2032**	Year **2033**	Year **2034**	Total
Specify the co-financing body	p.m.	p.m.	p.m.	p.m	p.m.	p.m.	p.m.	p.m
TOTAL appropriations co-financed								

3.3. Estimated impact on revenue

(14) ☒ The proposal/initiative has no financial impact on revenue.

(15) ☐ The proposal/initiative has the following financial impact:

☐ on own resources

☐ on other revenue

☐ please indicate, if the revenue is assigned to expenditure lines

4. DIGITAL DIMENSIONS

4.1. Requirements of digital relevance

Reference to the requirement	Requirement description	Actors affected or concerned by the requirement	High-level Processes	Categories
R1 Article 6	Persons concerned and, where applicable, employers, shall be able to submit requests for social security documents falling within the scope of this Regulation fully online using procedures that comply with Regulation (EU) 2018/1724. The online request procedure shall be user-friendly, accessible and comply with the following requirements: (a) It shall enable the electronic identification and authentication of the person concerned and, where applicable, the employer; (b) It shall allow for the electronic provision of the information, documents or supporting evidence, referred to in Article 3(2) of Regulation (EC) No 987/2009, necessary to process the request; (c) It shall ensure that the final submission of the request can be completed remotely; (d) It shall provide the person concerned and, where applicable, the employer with an automatic acknowledgement of receipt after the completed submission has been	• Issuers of social security documents • Holders of social security documents and applicants	Request social security documents	• Data • Process digitalisation and automation • Digital public service(s)

	completed, unless the document is issued immediately; (e) It shall notify the person concerned and, where applicable, the employer, electronically that the issuing procedure has been completed.			
R2 Article 7(1)	The competent institutions shall issue digital social security documents in a format suitable for use in the European Digital Identity wallet of the person concerned, and where relevant, of the employer. The digital social security documents shall comply with the technical specifications adopted pursuant to paragraph 11.	• Issuers of social security documents • Holders of social security documents and applicants	Issue digital social security documents	• Data • Process digitalisation and automation • Digital solutions • Digital public Service(s)
R3 Article 7(2)	By way of derogation from paragraph 1, the competent institutions shall, at the request of the person concerned or the employer, issue the social security document in a standardised and accessible physical format. Such a document shall include a QR code or any other electronic features to enhance its security, in accordance with the technical specifications adopted pursuant to paragraph 11.	• Issuers of social security documents • Holders of social security documents and applicants	Issue physical documents enhanced with digital features	• Data • Process digitalisation and automation • Digital solutions • Digital Public Service(s)
R4 Article 7(3)	Each Member State shall communicate to the Commission a list of issuers and shall keep that list	• Member States	Issue of social security	• Data • Process digitalisation and automation

	up to date. The Commission shall make those lists available to the public through a secure channel and in an electronically signed or sealed form suitable for automated processing. With regard to issuers of the portable document A1, the list shall be communicated to the Commission by [date of entry into force plus 12 months]. Member States shall communicate the list of issuers of EHIC and other social security documents falling within the scope of this Chapter by [date of entry into force plus 3 years].		documents	• Digital solutions • Digital Public Service(s)
R5 Article 7(4)	Before issuing a social security document, the issuers shall verify the accuracy of the information provided by the persons concerned and, where applicable, by the employers in support of their request, including by means of digital tools.	• Member States	Verify information before issuing social security documents	• Data • Process digitalisation and automation • Digital solutions
R6 Article 7(5)	Where a social security document referred to in paragraph 1 or 2 is revoked, the issuer shall immediately notify the person concerned and, where applicable, the employer, by electronic means, except if other means are indicated by the person concerned and, where applicable, the employer.	• Issuer • Holders of social security documents and applicants	Inform on issuance and revocation of social security documents	• Data • Process digitalisation and automation • Digital solutions • Digital Public Service(s)
R7 Article 7(6)	The issuers shall ensure that a person is able to receive and store, within their own European	• Member States	Issue digital social security	• Data • Digital Public Service(s)

	Digital Identity wallet, the digital social security documents of their minor children and of a natural person whom they legally represent.		documents of legally represented persons	
R8 Article 7(7)	Social security documents issued under paragraph 1 and 2 by one Member State shall be recognised by verifiers in all other Member States.	• Member States • Verifiers of social security attestations • Holders of social security documents	Recognise social security documents	• Data • Digital solutions • Digital Public Service(s)
R9 Article 7(8)	Member States shall ensure that verifiers established on their territory are equipped with the necessary technical means to verify the social security documents issued under this Article, in order to confirm their authenticity, integrity and validity. Verifiers shall be able to verify that: (a) the document was issued by an authorised institution; (b) the data contained in the document has not been tampered with since issuance; (c) the document has not expired or been revoked.	• Member States • Verifiers • Holders of social security documents	Verify social security documents	• Data • Process digitalisation and automation • Digital solutions • Digital Public Service(s)
R10 Article 9(2)	From [date of entry into force plus 3 years], Member States shall ensure that healthcare providers on their territory are able to electronically transmit the data contained in the European Health Insurance Card of a patient from another Member State, and all the data that need to	• Member States • Healthcare providers • Insured persons receiving treatment	Transmit data for the reimbursement of costs under the EU social security coordination	• Data • Process digitalisation and automation • Digital solutions • Digital Public Service(s)

	be transmitted for the reimbursement process, to the competent institutions of the Member State of treatment.		rules	
R11 Article 8	Competent institutions shall issue social security documents to the person concerned and, where applicable, the employer in compliance with the deadlines established in accordance with paragraph 2.	• Issuers of social security documents • Holders of social security documents and applicants	Issue social security documents	• Digital Public Service(s)
R12 Article 10(2)	The Commission shall establish, by means of implementing acts, a common technical framework to ensure interoperability between national portals used to request the portable document A1 and the public interfaces connected to the Internal Market Information System for the declaration of posting of workers and for the posting of drivers in road transport, as provided for in Article 1(11) of Directive (EU) 2020/1057. That technical framework shall enable the reuse of relevant submitted data across the procedures for the request of the portable document A1 and the submission of posting declarations, in compliance with Regulations (EU) 2016/679 and (EU) 2018/1725 and the once-only principle.	• Commission • Member States • Portable document A1 applicants	Requests for portable document A1	• Data • Digital solutions • Digital Public Service(s)
R14 Article 14(1)	Member States shall collect and transmit to the Commission data on the implementation of	• Member States • Commission	Report	• Data

	Article 8(1) and Article 11(2).			
R15 – Article 11(1)-(2)	Member States shall exchange, access and process the data required to apply Regulations (EC) No 883/2004 and (EC) No 987/2009 via the Electronic Exchange of Social Security Information (EESSI) system, in accordance with its functional and technical specifications laid down pursuant to Article 78 of Regulation (EC) No 987/2009. When exchanging data via the EESSI system, Member States shall comply with the maximum time periods laid down in Annex I of this Regulation.	Member States	Cross-border information exchange	Data Process digitalisation and automation Digital Public Service
R16 - Article 7(10)	Interoperability of ESSPASS with EESSI and other initiatives		Interoperability	Digital Public Services

4.2. Data

High-level description of the data in scope

Type of data	**Reference to the requirement(s)**	**Standard and/or specification (if applicable)**

Personal and non-personal data contained in the digital social security documents	R2 R7 R8 R9 R10	As provided for in Article 7(11), data specifications for digital social security documents will be defined through implementing acts, in accordance with the examination procedure referred to in Article 5 of Regulation (EU) No 182/2011. These specifications will comply with the common standards, schemas, formats and technical specifications established under the European Digital Identity (EUDI) framework. They will also draw upon the work undertaken during the ESSPASS pilot projects and the recommendations of the Ad hoc group of the Administrative Commission on ESSPASS.
Personal and non-personal data contained in the physical social security documents enhanced with digital features	R3 R8 R9 R10	As provided for in Article 7(11), data specifications for the enhanced physical social security documents will be defined through implementing acts, in accordance with the examination procedure referred to in Article 5 of Regulation (EU) No 182/2011. These specifications will also draw upon the work undertaken during the ESSPASS pilot projects and the recommendations of the Ad hoc group of the Administrative Commission on ESSPASS.
Personal Identification Data (PID) attributes held in the EUDI wallet	R2 R7 R8 R9 R10	The disclosure of PID attributes to the verifier will be performed through EUDI wallet presentation protocols defined under the EUDI framework.
Personal identification data or identifier and other data required to request social security	R1	The identification and authentication in national portals and the exchange of information for requesting social security documents

documents online	R5	will follow the specifications and protocols used in the Member States.
Data about issuers of social security documents	R4	Issuers registration in the trust lists will follow the specifications and protocols defined under the EUDI framework
Data regarding the implementation of Article 8(1) and Article 11(2)	R13	The format and structure for the reporting obligation will be defined through implementing acts, in accordance with the examination procedure referred to in Article 11(2) of Regulation (EU) No 182/2011.
Data required to apply Regulations (EC) No 883/2004 and (EC) No 987/2009, exchanged between competent institutions – personal and non-personal data	R15	Exchanges take place via the EESSI system in accordance with its functional and technical specifications laid down pursuant to Article 78 of Regulation (EC) No 987/2009.

Alignment with the European Data Strategy

The requirements are consistent with the objectives of the European data strategy. They facilitate secure access and interoperable exchange of standardised data among relevant stakeholders across borders.

The requirements comply with the rights to privacy and data protection guaranteed in the Charter of Fundamental Rights of the European Union, the Treaty on the Functioning of the European Union, the General Data Protection Regulation and the EU Data Protection Regulation.

No open data is processed under these requirements. The reporting obligation set out in Article 14 generates data exclusively for monitoring purposes, without mandating the reuse of the reported information.

Alignment with the once-only principle

The requirements adhere to the once-only principle: social security documents, regardless of format, are issued once by national authorities, enabling individuals and businesses to securely reuse them digitally without resubmitting the same data. These documents are verified cross-border after consent is obtained.

Article 10(2) and (3) aim to implement the once-only principle to reduce administrative burdens and eliminate redundant data submissions when requesting portable document A1.

High-level description of the data flows

Type of data	Reference(s) to the requirement(s)	Actors who provide the data	Actors who receive the data	Trigger for the data exchange	Frequency (if applicable)
Personal and non-personal data contained in the digital social security documents	R2 R7	Issuers	Holders of documents and applicants	Issuance of digital social security documents	
Personal and non-personal data contained in the physical social security documents enhanced with digital features	R3	Issuers	Holders of documents and applicants	Issuance of physical social security documents enhanced with digital features	
Personal Identification Data (PID) attributes held in the EUDI wallet	R9	Holders of documents	Verifiers	Request from the verifiers and explicit authorisation from the holders	
Personal and non-personal data contained in the digital social security documents	R9	Holders of documents	Verifiers	Request from the verifiers and explicit authorisation from the holders	
Personal and non-personal data contained in the physical social security documents enhanced with digital features	R9	Holders of documents	Verifiers	Request from the verifiers and holders' presentation of the physical documents	

Personal identification data or identifier and other data required to request social security documents online	R1	Applicants	National portals for requesting social security documents	Application for the issuance of social security documents	
Data about issuers of social security documents	R4	Issuers	Commission	Communication to the Commission of the trust lists of issuers, any subsequent update	
Personal Identification Data (PID) attributes held in the EUDI wallet	R10	Verifiers of EHIC	Authorities in the Member States of treatment	Transfer of data for reimbursement processing	
Personal and non-personal data contained in the digital social security documents	R10	Verifiers of EHIC	Authorities in the Member States of treatment	Transfer of data for reimbursement processing	
Personal and non-personal data contained in the physical social security documents enhanced with digital features	R10	Verifiers of EHIC	Authorities in the Member States of treatment	Transfer of data for reimbursement processing	
Data regarding the implementation of Article 8(1) and Article 11(2)	R13	Member States	Commission	Reporting obligation	
Data required to apply Regulations (EC) No 883/2004	R15	Member States	Member States	Need basis and within the maximum time	N/A

and (EC) No 987/2009				periods laid down in Annex I	

4.3. Digital solutions

High-level description of digital solutions

Digital solution	Reference(s) to the requirement(s)	Main mandated functionalities	Responsible body	How is accessibility catered for?	How is reusability considered?	Use of AI technologies (if applicable)
ESSPASS issuing infrastructure	R2 R3	Issuance, management and revocation of digital social security documents and physical social security documents enhanced with digital features	Member State competent authorities	For the digital social security documents, accessibility is addressed through the Member States' implementation of the EUDI wallets (Article 5a(21) of Regulation (EU)No 910/2014). For physical documents, accessibility requirements will be defined in the technical specifications to be adopted through implementing act, in accordance with	For the digital social security documents, the solution is based on the EUDI framework and reuses its core components, such as the EUDI trust framework, the EUDI wallet, the PID issuance infrastructure, trust registries and lists, interoperability specifications. The EUDI trust	N/A

				Article 7(11).	framework is also being considered for reuse in relation to physical social security documents.	
ESSPASS verifier application/s	R8 R9	Verification of digital social security documents and physical social security documents enhanced with digital features	Member State competent authorities	The accessibility requirements of the verifiers' application/s interacting will be defined through implementing acts, in accordance with Article 7(11).	As one of the implementation options, the Commission may provide a reference implementation of the application for reuse and configuration by Member States on a voluntary basis. This will be discussed with Member States prior to the implementation phase. Details of the verification application will be defined through implementing acts, in accordance with Article 7(11). As investments and adaptations for healthcare digital systems are already	

					provided for under the European health data space, these should be leveraged to create synergies that maximise their impact and efficiency.	
Online portals for requesting social security documents	R1	Request of social security documents	Member State competent authorities	Responsibility for ensuring the accessibility of national portals rests with the Member States. Article 6(1) provides that online request procedure shall be accessible	Depending on a Member State's digital landscape and organisational structure, existing portals could be updated to include online requests for additional social security documents.	

Alignment of the digital solution with applicable digital policies and legislative enactments

<u>ESSPASS issuing infrastructure</u>

Digital and/or sectorial policy (when these are applicable)	**Explanation on how it aligns**
AI Act	No use of AI is foreseen in the proposed Regulation.
EU Cybersecurity framework	All security aspects of the issuing infrastructure, including the security requirements for issuers of digital social security documents, the EUDI wallet

	security features and the communication protocols between issuer and wallet, are covered by the EUDI framework Regulation. The same security requirements for the issuance of digital social security documents will also apply to the physical documents enhanced with digital security features. They will be further detailed in the technical specifications.
eIDAS	The solution is based on the EUDI framework and reuses its core components. The EUDI trust framework is also being considered for reuse in relation to physical social security documents. These documents will include eIDAS-compliant electronic signatures, providing the same level of assurance as digital social security documents.
Single Digital Gateway and IMI	The solution is built on the foundations established by the Single Digital Gateway Regulation (SDGR), which mandates that Member States enable fully online access to administrative procedures, such as A1 portable document requests, EHIC applications, and pension claims, while ensuring the electronic issuance of outputs. The solution standardises the format of these outputs to facilitate cross-border verification and further extends digitalisation to all social security documents within the scope of the proposed Regulation.
Others	

Verifier application

Digital and/or sectorial policy (when these are applicable)	**Explanation on how it aligns**
AI Act	No use of AI is foreseen in the proposed Regulation.

EU Cybersecurity framework	All security aspects of the verifier application, including the verification protocols, will be compliant with the cybersecurity requirements defined under the EUDI framework. They will be further detailed in the technical specifications.
eIDAS	The verification of digital social security documents will comply with EUDI protocols and standards, which are defined to support the implementation of eIDAS. The physical documents enhanced with digital features will include eIDAS-compliant electronic signatures, verifiable via the same verifier application.
Single Digital Gateway and IMI	Interoperability with IMI.
Others	

<u>Portals to request ESSPASS attestations</u>

Digital and/or sectorial policy (when these are applicable)	**Explanation on how it aligns**
AI Act	No use of AI is foreseen in the proposed Regulation.
EU Cybersecurity framework	The proposed Regulation does not impose any additional cybersecurity requirements.
eIDAS	Portals should support login based on the Personal Information Data (PID) presentation from the EUDI wallet.
Single Digital Gateway and IMI	The Your Europe portal will serve as a possible single-entry point for applicants to request the social security documents covered under the Single Digital Gateway Regulation, redirecting them to the national portals for document requests. Article 10 of the proposed Regulation (R13) address interoperability between

	national portals for requesting the portable document A1 and the public interfaces connected to the Internal Market Information System for the declaration of posting of workers, currently under negotiations, and for the posting of drivers in road transport.
Others	

4.4. Interoperability assessment

High-level description of the digital public service(s) affected by the requirements

Digital public service or category of digital public services	**Description**	**Reference(s) to the requirement(s)**	**Interoperable Europe Solution(s)** **(NOT APPLICABLE)**	**Other interoperability solution(s)**
ESSPASS – Request, issuance and revocation of social security documents	This service, provided by competent authorities in Member States, enables applicants to request and receive social security documents either in a digital format for use in the EUDI wallet or as a physical document enhanced by digital features.	R2 R3 R7 R13	//	EUDI framework and wallet
ESSPASS - Verification of social	This service, provided by verifiers, enables holders of social security documents to have their	R8 R9		EUDI framework and wallet

security documents	documents instantly verified and validated through digital means (i.e. the verifier application). For digital social security documents, the service also allows holders to confirm whether the verifier is authorised to request and verify the document.			

Impact of the requirement(s) as per digital public service on cross-border interoperability

<u>Request, issuance and revocation of social security documents</u>

Assessment	**Measure(s)**	**Potential remaining barriers (if applicable)**
Alignment with existing digital and sectorial policies **Please list the applicable digital and sectorial policies identified**	- Adoption of technologies and standards set out under the EUDI Regulation - Use of digital signatures in compliance with the eIDAS Regulation (for physical social security documents enhanced with digital features) - Compliance with GDPR - Synergies with processes related to EESSI (R 15)	
Organisational measures for a smooth cross-border digital public services delivery	- Establishment of a modern and efficient governance structure, comprising a Committee under Regulation (EU) No 182/2011 to support the Commission	

Please list the governance measures foreseen	in adopting implementing acts and an Advisory Group on Digitalisation in Social Security Coordination to provide technical advice, operational support and a community of practice for exchanging experiences and knowledge. - Registration of trusted issuers within the trust framework and notification of the corresponding trust lists to the Commission. - Mutual recognition of social security documents	
Measures taken to ensure a shared understanding of the data **Please list such measures**	- Shared specifications adopted through implementing acts, in accordance with the examination procedure referred to in Article 5 of Regulation (EU) No 182/2011. - Advisory Group providing expertise to the Commission in the early preparation of implementing acts before submitting to the Committee.	
Use of commonly agreed open technical specifications and standards **Please list such measures**	- Adoption of technical specifications for digital social security documents as provided for in Article 7(1) - Adoption of technical specifications for physical social security documents enhanced with digital features as provided for in Article 7(2)	Potentially high impact for authorities with lower levels of technological maturity

<u>**Verification of social security documents**</u>

Assessment	Measure(s)	Potential remaining barriers (if applicable)
Alignment with existing digital and sectorial policies **Please list the applicable digital and sectorial policies identified**	- Adoption of technologies and standards set out under the EUDI Regulation - Use of digital signatures in compliance with the eIDAS Regulation (for physical social security documents enhanced with digital features) - Synergies with e-Health initiatives using the EUDI wallets	
Organisational measures for a smooth cross-border digital public services delivery **Please list the governance measures foreseen**	- Establishment of a modern and efficient governance structure, comprising a Committee under Regulation (EU) No 182/2011 to support the Commission in adopting implementing acts and an Advisory Group on Digitalisation in Social Security Coordination to provide technical advice, operational support and a community of practice for exchanging experiences and knowledge. - Registration of authorised verifiers in accordance with the EUDI trust framework.	
Measures taken to ensure a shared understanding of the data **Please list such measures**	- Shared specifications adopted through implementing acts, in accordance with the examination procedure referred to in Article 5of Regulation (EU) No 182/2011. - Advisory Group providing expertise to the Commission in the early preparation of implementing acts before submitting to	

	the Committee.	
Use of commonly agreed open technical specifications and standards **Please list such measures**	- Adoption of technical specifications for verification of social security documents, regardless of format, as provided for in Article 7(11)	

4.5. Measures to support digital implementation

High-level description of measures supporting digital implementation

Description of the measure	**Reference(s) to the requirement(s)**	**Commission role** (if applicable)	**Actors to be involved** (if[42] applicable)	**Expected timeline** (if applicable)
Adoption of implementing acts on the functional, operational and technical specifications, as provided for in Article 7(1) (2) (11).	R2 R3 R7 R8 R9	Preparing and adopting the implementing acts	Commission, Committee composed of representatives of Member States	

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