



Just Transition Platform Working Groups

Action 6: A checklist to measure the qualitative involvement of stakeholders in the transition and the TJTP implementation process

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Action 6: A checklist to measure the qualitative involvement of stakeholders in the transition and the Territorial Just Transition Plans (TJTJs) implementation process

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Category: Horizontal

The **Just Transition Platform (JTP) Working Groups (WGs)**, established in November 2021, bring together all stakeholders from across Europe with a common concern for the people and places affected by the transition to a climate-neutral economy. The WG for **Steel, Cement and Chemicals** each have a focus on a specific carbon intensive sector that is heavily impacted by the transition, while a fourth WG focuses on **Horizontal Stakeholder Strategy**.

After finalising their [Scoping Papers](#), outlining the focus areas and objectives of their WG, the WG members developed a [common Implementation Plan](#), which sets out their 17 Actions. This plan was finalised and published in April 2023. Throughout the rest of the year, the Action leaders, together other WG members contributing to the Action, have been implementing their respective Action.

This document presents the final output of Action 6.

Disclaimer:

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Introduction

Challenges addressed by Action 6

The Just Transition Fund (JTF) Regulation (Article 11, paragraph three) foresees the involvement of partners in the preparation and the implementation of the TJTPs, thus referring to Article 8 of the Common Provisions Regulation (CPR). Article 8 establishes the Partnership Principle for the preparation and implementation of the Partnership Agreement and the programmes for the relevant funds and indicates the relevant groups of partners that should be at least included in the process.

Stakeholders in the WG and broader JTF community have regularly stated that they feel that the current rules of the JTF regulation, the CPR and the Code of Conduct are often too abstract, do not clearly identify the requirements and thus do not ensure comprehensive involvement in practice. They do not include any concrete indicators and therefore do not allow a measurement of actual involvement of the relevant stakeholders in the process. At the same time, managing authorities of cohesion policy programmes have mentioned they consider the rules to be too detailed and create additional burdens without adding value. Therefore, stakeholders' roles in the implementation of the just transition programmes should be made clearer, including the rules of participation in their official programme/monitoring committees.

Objectives of Action 6

Within the proposed Action, we have developed a monitoring mechanism (checklist) that would allow all partners as well as the European Commission to check how their system compares to an 'ideal world scenario'. While the work of the group focuses on the JTF, the method could also be used in the implementation of other funds.

By using the checklist, managing authorities could provide information on what aspects are already implemented before then giving partners the opportunity to give their assessment. The checklist should enable a qualitative analysis on the basis of objective criteria while no penalties are foreseen where a managing authority does not fully reach the 'ideal world scenario'. Furthermore, the checklist should be digitally available (ideally on a central website), not create unproportional administrative burden but rather foresee minimal effort (in most cases, a yes/no answer will be sufficient). The ability to compare the respective systems against objective criteria should help all parties involved to work towards a more meaningful cooperation between all involved groups. The document furthermore provides guidance on the process, suggesting the mid-term review as the ideal point to conduct an assessment of partners. This would allow the European Commission to enhance the legal framework for the coming funding period.

Stakeholders targeted by Action 6

The proposed checklist was established to provide clear indicators to managing authorities and stakeholders/partners alike who want to measure the qualitative involvement of stakeholders in the transition and TJTP implementation process in the region.

How this Action was implemented

The group has agreed not to conduct a survey, but to rather address managing authorities and associations representing partners directly, asking them for input on the topic. The work on the checklist builds on the work of the European Community of Practice on Partnership (ECoPP) and in particular the work of the Subgroup two on 'Co-creating meaningful partnership', which published its interim report in 2023.

A checklist to measure the qualitative involvement of stakeholders in the transition and the TJTP implementation process

The following indicators have been identified by the group and the consulted stakeholders, which are designed to help managing authorities better understand the needs of beneficiaries in the process. The indicators are established in the form of a checklist, ensuring the relevant aspects can be easily assessed. While the majority of points are designed as yes/no questions, two points will require more detailed information provided by the managing authorities (3.1 and 4.1).

Indicators

1. Information/training

- Were the partners provided with all relevant information?
- Were the information channels for this clear and accessible?
- Do partners possess sufficient knowledge of the structure and priorities of the funds? And if not, has the managing authority provided training and expertise?
- Have stakeholders been sufficiently educated on the process of programming and implementation?
- Do the partners possess sufficient knowledge of the role the EU rules foresees for the monitoring committees?

2. Timeline/timing

- Have the partners been consulted at an early stage, thus allowing them to identify specific challenges they are facing on the ground?
- Has a strategic decision been taken before the partners were consulted?
- Did the partners receive all relevant documents and have adequate time to read them and provide feedback?
- Have regular meetings of the monitoring committee taken place to allow a constant flow of information between managing authorities and stakeholders?

3. Representation

- Which criteria were used when identifying partners?
- Have all partners been involved in the process? If not, who is missing?
- Have efforts been undertaken to ensure the participation of vulnerable groups?

- Were all relevant partners sufficiently represented in the monitoring committees?
- Did the meetings of the monitoring committee take place during working hours?
- Were 'non-professional' representatives able to attend regularly?
- Was there an equal representation of all interest groups in the monitoring committee?

4. Form of contact

- Have partners been contacted in a targeted way?
- Have existing structures/associations been used as a point of contact?
- Have there been certain groups to which establishing contact was more challenging?

Process and responsible bodies

The checklist should ideally be introduced as part of the upcoming mid-term review of the current cohesion funding period (Q1 2025) to assess the involvement of stakeholders in the current funding period. This would allow the managing authorities to assess whether their existing structures could be enhanced for the coming funding period (post 2027). It could furthermore help the European Commission to assess whether the respective regulations (CPR and/or the Code of Conduct on Partnership, Delegated Regulation 240/2014) need further amendments. In the coming funding periods, it could be considered a part of every coming mid-term review.

Step 1: The Managing Authority fills the template provided by the JTP Horizontal WG (self-evaluation)

One challenge that has been identified is that there is a need to encourage the managing authorities to use the checklist, given that the relevant regulations do not foresee it. The European Commission has a crucial role in clarifying that this is considered very relevant.

Step 2: Stakeholders provide feedback on the template filled by Managing Authorities

While it is difficult to have a general approach on which stakeholders should be a part of the exercise, at least the groups which are represented in the monitoring committees should be asked to provide feedback. The managing authorities should however be encouraged to engage with as many groups of stakeholders as possible. To facilitate the process, the managing authorities can mandate a coordinator among the partners, which will be entrusted to help with the process.

Step 3: Create a report based on the outputs of Step 1 and 2 and submit it to the European Commission

The managing authority should be asked to create a report on the basis of the replies from the partners, which it will then send to the European Commission to facilitate the assessment of the involvement of partners. The report should be made publicly available by the European Commission and the report shall be discussed with stakeholders in a meeting of the monitoring committee.

General principles for monitoring and evaluation

Measuring and evaluating the stakeholder engagement should not be one-time activity, the checklist provides a basis for a more regular involvement, which could be conducted by the managing authority during the most important steps of the implementation, e.g. consultations during the development of calls, just after launching the calls, in the middle of financial period and at the end of financial period.

Annexes

Please refer to the checklist in the annex (in MS Excel format).

