

### CPR 2021-2027

How to deal with the list of operations & the publication of calls?

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26 October 2021

# Let's get in the mood

Kindly open sli.do on your smartphones or web browsers

Enter #CPR2127 or scan the QR code



# Agenda

The CPR
The technicalities
Best practices
The support
Q&A
Next steps

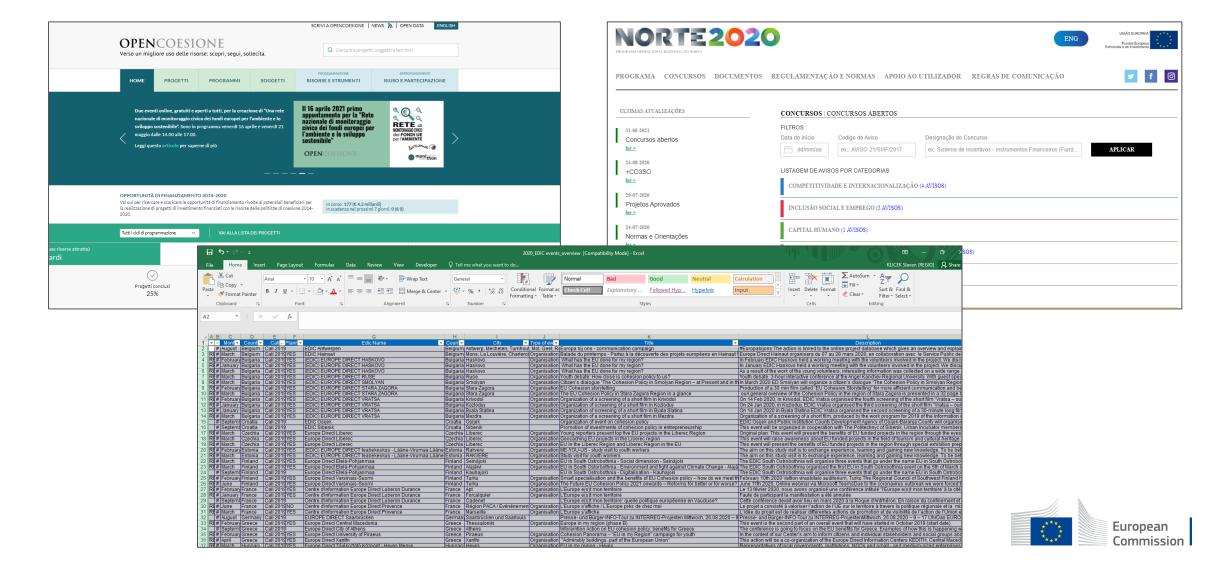


### Housekeeping to start with...

- Q&A session planned for the last 10 min of the training.
- Please no questions in the chat colleagues on the webstream will not be able to see them.
- Please note that questions concerning interpretation of the regulation include a formal procedure and cannot be answered straight away.



### A look back to 2014-2020...



### ...and a leap forward to 2021-2027.

Our approach for communication, transparency and visibility:

- Single set of rules for programmes
- Single branding
- Single project data and calls system
- Single network and coordination



# The legal basis: Common Provisions Regulation

Regulation (EU) 2021/1060 and provisions addressing the list of operations and funding calls



### Communication in the CPR

#### Overview of relevant articles

#### **Programming**

Art. 22(3) defines approach to communication for each programme

#### **Monitoring**

Art. 40 - 42 sets out monitoring requirements

# Chapter III: Visibility, transparency & communication - Art. 46 - 50

- Common visibility of EU funding
- Emblem of the Union
- Communication officers & coordination mechanisms
- Requirements for managing authorities
- Requirements for beneficiaries

#### **Technical specifications**

Annex IX



### **Funding calls**



Art. 49 (2) The managing authority shall ensure the publication on the website referred to in paragraph 1, or on the single website portal referred to in point (b) of Article 46, of a timetable of the planned calls for proposals, that is updated at least three times a year, with the following indicative data:





### List of operations



Art. 49 (3) The managing authority shall make the list of operations selected for support by the Funds publicly available on the website in at least one of the official languages of the institutions of the Union and shall update that list at least every 4 months. Each operation shall have a unique code. The list shall contain the following data...





# **Publishing format**



Art. 49 (4) The data referred to in paragraphs 2 and 3 of this Article shall be published on the website referred to in paragraph 1, or on the single website portal referred to in point (b) of Article 46 of this Regulation, in open, machine-readable formats, as set out in Article 5(1) of the <u>Directive (EU) 2019/1024 of the European Parliament and of the Council (48)</u>, which allows data to be sorted, searched, extracted, compared and reused.





# Informing the beneficiaries



Art. 49 (5) The managing authority shall inform the beneficiaries that the data will be made public before the publication takes place in accordance with this Article.





# What lists of operations and funding calls are and what they are not?

#### They certainly are:

A legal requirement to raise transparency and accessibility of Cohesion policy

An overview of projects funded / calls open in a programme / MS

A publicly available document

An up-to-date overview

#### They surely aren't:

A box ticking exercise

A stand-alone spreadsheet somewhere on the programme website

Top-secret file

A document dating back to BC



# The factsheet

	Funding calls	List of operations
Who?	To be published by the Managing Authority	
For whom?	Applicants and beneficiaries, experts, citizens in your programme or country	Journalists, experts, media, beneficiaries and citizens, EU in your programme or country
Why?	To showcase to your target audiences how funding is being allocated	To showcase to your target audiences which projects are being implemented
What?	A programme's timetable of planned calls for proposals	A programme's list of operations
Where?	Programme website or single website portal	
When?	At least three times a year	At least every four months
How?	In open, machine-readable formats	

# The technicalities

Producing & publishing quality lists of operations & funding calls



## Making the most out of it

More transparency and accessibility = more visibility.

More visibility = more applicants and a more informed participation.

More informed participation = more outstanding projects.

How to do it? Follow the regulation & make the most out of it.





#### Geographical area covered by the proposal

Aim: providing a geographical overview of funding opportunities

- NUTS regions as the most comparable format
- Preferably > NUTS 3 or 2
- Alternatives: zip codes...





#### Policy objective or specific objective concerned

Aim: making applicants aware of thematic aims of calls and their contribution to the policy

According to article 5 of the CPR and Fund-specific regulation

Tip: introduce codes in addition to objective names

(e.g.: PO1 | A more competitive and smarter Europe)





#### **Eligible applicants**

Aim: clarifying who can submit project proposals to the call

- Types of applicants eligible
- NGOs, SMEs, public authorities, natural persons, government bodies...





#### Total amount of support for the call

Aim: making information about EU funding transparent

Preferably in EUR





#### Start and end date of the call

Aim: publishing information about calls' opening and deadlines

- Start and end dates of the call
- Preferred format: DD/MM/YYYY





- Programme title and CCI
- Funding call title
- Funding call identifier: a unique value provided to the call
- Additional information to support applicants:
  - procedures to apply,
  - eligibility,
  - timeline of assessment,
  - call summary,
  - ...

# Essential elements funding calls





#### Operation | Unique code

Aim: capturing and cross-checking data, and allowing automatization

An identification number defined by the MS / MA

Operation | Name of the operation

Aim: making operations and their mission recognizable Tip: encourage beneficiaries to choose simple and understandable names and avoid technical terms (acronyms only if meaningful)





# Operation | Purpose of the operation and its expected or actual achievements

Aim: communicating the aim of operations and illustrating the policy with concrete achievements

 A tailored description of the operation's goal and accomplishments





# Operation | Start date and expected or actual date of completion of the operation

Prefered format: DD/MM/YYYY

#### Operation | Type of intervention

According to Annex I of the CPR

Tip: introduce codes in addition to names (e.g.: 010 | Research and innovation activities in SMEs, including networking)





**Operation** | Location indicator or geolocation for the operation

Aim: informing citizens how to easily find projects in their vicinity

Tip: provide geographical longitude and latitude as these are the most precise data

Operation | Location of the beneficiary (when a legal entity) or NUTS 2 level region (when a natural person)\*

\* for mobile operations or operations covering several locations





#### Beneficiary | Beneficiary's \* and contractor's \*\* name

Aim: raising transparency of institutions, organisations, authorities and contractors implementing operations / activities

Tip: introduce full legal names of companies, organisations...

\* In case of legal entities = name; in case of natural persons = first name and surname (to be removed 2 years from publication)

\*\* In case of public procurement





# **Beneficiary** | Union fishing fleet register identification number\*

Aim: monitoring and combining data from the Union fishing fleet register and other information systems

 An identification number according to <u>Commission</u> <u>Implementing Regulation (EU) 2017/218</u>

\* For EMFAF; to be removed 2 years from publication





#### Funding | Total cost

 Costs of operations, including from the Funds and other (national or private) sources. Preferably in EUR.

\_\_\_\_\_

#### Funding | Fund concerned

Tip: use official translations (EN: ERDF, HR: EFRR, IT: FESR...)

\_\_\_\_\_

#### Funding | Union co-financing rate

By project if possible





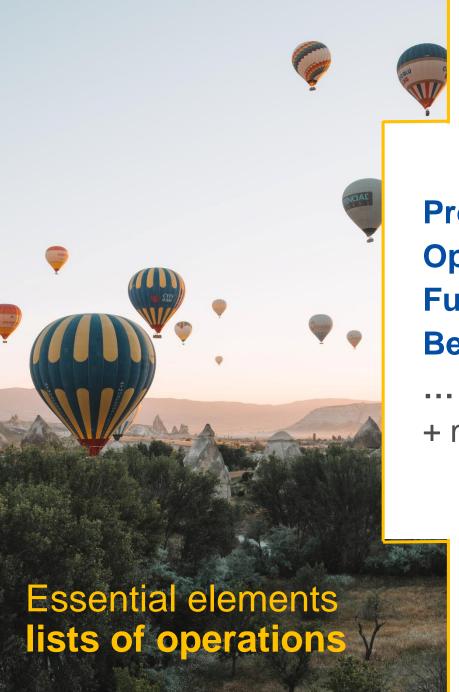
#### Programme | Specific objective concerned

Aim: showcasing the wider picture of the programme and pointing out to operation's contributions

Tip: introduce codes in addition to objective names

(e.g.: SO2 | Increasing energy efficiency...)





Programme | Programme title and CCI & Priority
Operation | Operation of strategic importance
Funding | EU contribution
Beneficiary | Beneficiary ID

+ more elements covered in the support tool



# Good practices and examples

An inspiration from you, for you.



# Funding calls | dedicated funding sections

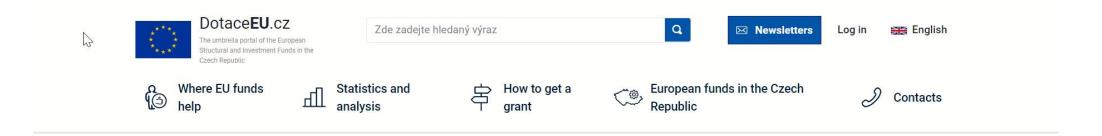


European

Commission

Example: HR single website portal

# Funding calls | geo & thematic call finder



#### Recommended



# Calendar of events and challenges



Example: CZ single website portal



# Funding calls | walkthroughs



How to get a grant > 10 steps to get a grant

#### 10 steps to get a grant

Acquisition procedure <u>subsidy</u>from the European Structural and Investment Funds involves several basic steps. Likeapplicantwe should start by creating <u>Project</u>continue through the selection of an appropriate program to the processing and submission of an application for support. If it will <u>Project</u>approved, its implementation takes place, to which other obligations are attached. Let's see what the <u>subsidy</u> system looks like from the point of viewapplicante step by step.

#### 1) Creating a detailed project plan

Example: CZ single website portal

#### 5) Project implementation

S successful applicantThe **contract** is then **signed**, which sets out in detail the conditions of implementation<u>Projectu</u>.

These are mainly the rules for selection <u>supplier</u>mandatory publicity, principles for keeping and storing documents, etc.

Tip: Any changes from the approved ones <u>Project</u>deal with such requests with the managing authority in order to avoid ineligible expenditure.

#### 6) Request for payment

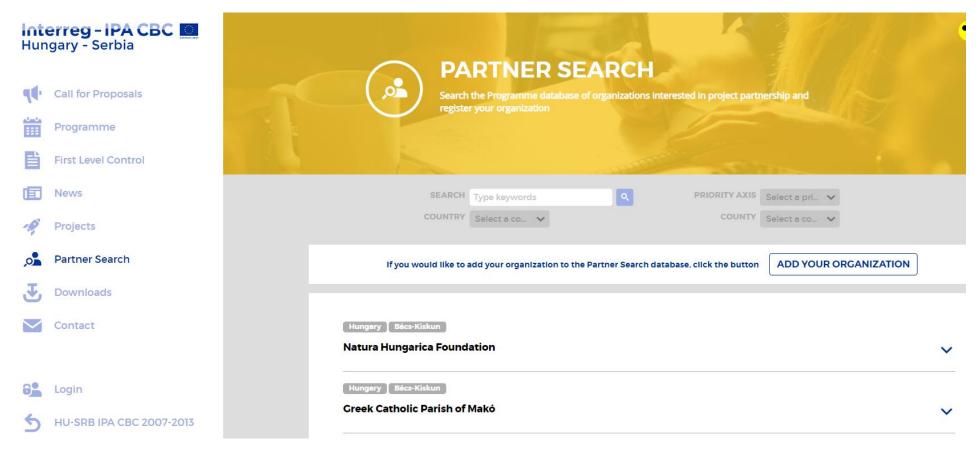
We will receive the money on the basis of a request for payment submitted to the managing authority or the representative institution. Payments can take various forms - reimbursement of already issued expenses (so-called expost payment), provision of funds in advance (so-called ex-ante payment) or the use of so-called combined payments. The specific conditions of payment claims shall be determined accordinglymanaging authority.

#### 7) Evaluation and billing

When submitting a request for payment, proof must be provided that the expenditure complies with the conditions contained in the signed contract. Therefore, let's not forget about the continuous taking of photographs, attendance lists, handover protocols, etc. We will later use them to document invoices, for example for trainings and seminars. Managing authority then checks to see if our claims are justified. If they are so-called eligible, we have money in the



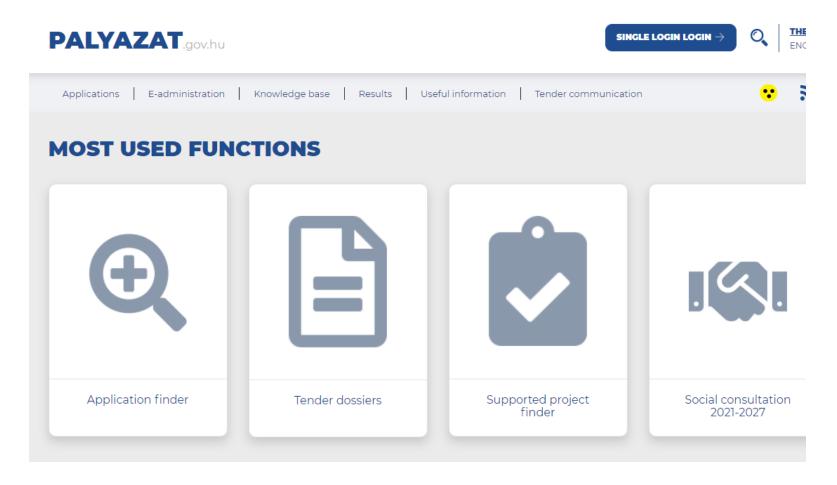
# Funding calls | partner searches





Example: Interreg HU-RS programme website

## Funding calls | call filters



Example: <u>HU single website portal</u>



## Funding calls | video tutorials







Preparing an application - Assessment

Preparing an application - Communication

## Funding calls | dissemination



Example: Finnish Ministry of the Interior, Home affair funds



## List of operations | good practices



## Harmonizing & consolidating

...across regions & programmes (ERDF ES) and on country level (PT, BE, PL)



## Raising data accessibility

Stable URL links
(ERDF ES);
API access (IT,
RO, BG)



## Including additional data

Beneficiary ID (<u>CZ</u>...)
Project ID (<u>AT ESF</u>...)
Thematic objectives,
priority axis (<u>LU</u>...)
Output indicators (<u>LT</u>)



# Setting up comprehensive MS portals

Open data (<u>IT, BG,</u> RO, <u>LT</u>)



## List of operations | path to data reusability

## Many programmes, many templates

- A list of operation for each OP
- Different templates
- Different websites

## Mainstreaming the structure

- A list of operations for each OP
  - Same template
- Accessible through the single portal

#### **Consolidation**

- A consolidated list of operations for all OPs
- Accessible trough the single website

## Harmonisation on country level

- Single website including operations from all OPs
  - Data visualisation
- Accessible through API



<sup>\*</sup> Inspiration from FAIR principles

### Why are these examples successful?

They improve data accuracy, reliability and quality of Cohesion policy operations & calls in their programmes and MS.

They play an important role in informing applicants, supporting them in drafting quality applications and consequently delivering projects results.

They ensure transparency, accessibility and visibility of Cohesion policy.

They bring Cohesion policy closer to citizen's understanding.

They contribute to a ready-to-use, EU-level knowledge base on Cohesion policy.



## The support tools

What are they and why use them.





- A manual and template for LoOs.
- Consists of a list of data fields, including mandatory and essential ones, and descriptions, formats and examples..
  - Unique ID, operations of strategic importance...
- For harmonization across MS.



- A knowledge base to capitalize existing data on EU level.
- By reusing the harmonized LoO datasets, Kohesio will create better transparency and visibility of Cohesion policy operations.



## Kohesio | the working method









#### Collect

Prepare the data for publication

#### **Structure**

Cross-check using the template + manual

#### **Publish**

...the data on the website

#### **Import**

EC captures list of operations from websites and includes it into Kohesio



MS + MAs

## **Synergies**

- A single project data system as an entry point to Cohesion policy
  - Kohesio & support tools to capitalize operations of strategic importance in 2021-2027 and highlight their apperance in the platform
  - Links to be created within Kohesio with other platforms: <u>InfoRegio</u>, <u>Open Data platform</u>, <u>Keep.eu</u>...



## Q&A

Questions received for today's training





Where the beneficiary is a natural person, what are the necessary data fields in that case?

- Specific data to be published for operations implemented by natural persons and those implemented by legal entities are mentioned in art. 49(3).
- \* Data to be removed 2 years from the initial publication (art. 49(3)).





Some of the compulsory data of the CPR and Kohesio are not consistent, e.g. Union cofinancing rate vs EU contribution. Are there any plans to harmonise this?

- As shown on previous slides, Kohesio aims to become the most comprehensive database on EU projects so far.
- For this, it upgrades the CPR provisions by asking essential data, such as the EU support provided to operations.
- The quality of the final representation of projects in Kohesio depends on the quality of data provided by MAs and MS.





How to deal with contractors' names in the list of operations? When does this apply? In this case beneficiaries and contractors must be informed that the data is published. Is there any advice on this? On which EU-websites will the data be published except Kohesio.eu?

- Lists of operations should include names of all relevant contractors.
- Informing beneficiaries shall be done according to art. 49(5).
- Art. 49(4) states that data shall be published according to the <u>Directive (EU) 2019/1024 on open</u> <u>data and re-use of public sector information.</u>





Are there any tools to correct proofs with the English translation on the Kohesio-website? I can imagine that data given in the list of operations (esp. name of the operation, purpose/achievements of the operation) are not always machine-translatable. Is there any experience on this?

- The machine translations of Kohesio are being upgraded with new vocabularies which will improve the quality of translations and make them more understandable.
- MAs and MS to support beneficiaries in drafting easy-to-read and jargon-free project summaries.
- Also, functionality in place to edit & improve specific projects information in Kohesio.





What exactly is meant by <u>e</u>)
Start and end date of the call of
Article 49(2) of Regulation (EU)
2021/1060. Is it the authorisation
period, the publication period or
something else?

### **Funding calls**

• Start and end date refer to actual dates when applicants can start submitting project proposals and the last day to do so.



Will there be a template for the publication of calls just like there is a template for the list of operations?

## **Funding calls**

 With work on-going for the calls system, possible options concerning funding calls template are being discussed.



## Your turn.



## Next steps

What's cooking in REGIO's kitchen?



## Incoming

- Lists of operations & Kohesio:
  - Fine-tuning and extending the architecture for 2021-2027
  - Setting up the professional space and functionalities for MAs/MS to co-create projects' profiles
  - Capturing data of all MS: batch 1, 2 & 3. Deadline: end of year.
  - Official launch: March 2022
  - Testing support tools and mainstreaming the process: continuosly
- Funding calls
  - On-going work for the calls system
- New trainings within INFORM EU



### The team







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## Thank you!

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