

***PROJECT CYCLE MANAGEMENT FOR DIGITAL, ECOLOGICAL AND  
SOCIAL INNOVATIONS  
Euro-planning techniques***

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**UNIVERSITÀ  
DEGLI STUDI  
DI TRIESTE**



Dipartimento

**Scienze Politiche  
e Sociali**

# Recap of the last lesson

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Activity tables and expense sheets

---

Building the project budget

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The preliminary cost estimate

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Project costs allocation

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Most common categories of expenditure in EU projects

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Provisional budget and operating budget

---

Financing budget and analytical budget

---

Eligible and non-eligible costs

---

Cofinancing and budget construction

# Project writing and analysis of selection criteria

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Before writing a project, it is always advisable to study the **selection and evaluation criteria** for the projects themselves.

These criteria vary depending on the funding program and the call for proposals, but they have some common features.

The proposal evaluation process serves to assess whether the projects:

- **Meet the minimum requirements of the program**  
(formal eligibility assessment)



# Project writing and analysis of selection criteria

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- **They are relevant to the program's objectives and to the broader policy objectives of the European Union.** An assessment is also made of the extent to which the project objectives are based on real problems (of the beneficiaries, the territory, the organizations operating in that sector).
- **Internal consistency** is assessed, i.e. the extent to which the project is logically constructed: do the activities lead to the results, the results to the specific objective and the specific objective to the general objective, through an analysis of the results chain?



# Project writing and analysis of selection criteria

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- **Sustainability** is assessed, i.e. the extent to which the improvement in the beneficiaries' situation can be considered lasting.
- **Relevance:** relevance determines the extent to which the project proposal is based on the real problems of the beneficiaries. To do this, the number of problems that the project presents must be examined.





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## Analysis of selection criteria – relevance

Project proposals are often rich in objectives (in terms of actions and statements) but lacking in terms of analysis of the difficulties and critical issues faced by the final beneficiaries of the project.

**If the problems appear to be few or generic, it is likely that the project is not relevant.**

A second parameter for assessing relevance is the way in which the problems are expressed: **the more specific and detailed they are, the more the proposal has been designed with close knowledge of the beneficiaries or the context around which the intervention revolves.**



# problem analysis solution

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## Analysis of selection criteria – relevance

Once the problems have been identified, they are compared with the project objectives: **the more they coincide, the more relevant the proposal will be**, i.e. based on the actual problems of the beneficiaries or the reality in which the intervention will take place.

If, on the other hand, there is no correspondence between problems and objectives, the proposal may be irrelevant.

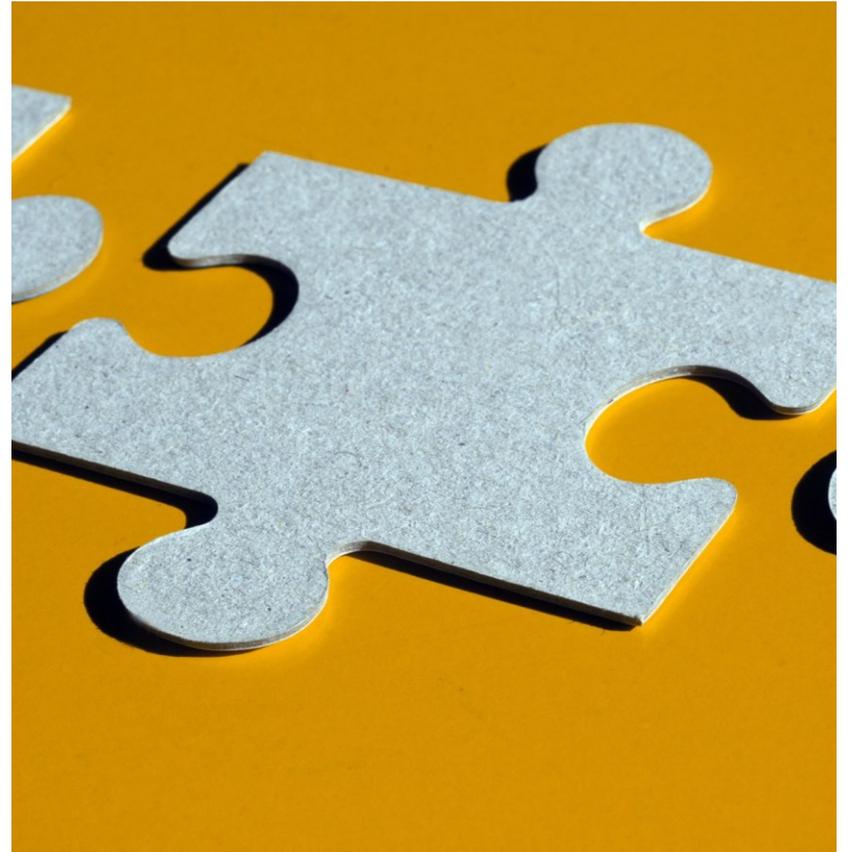
**Relevance should also be verified in relation to the policies and strategic documents** within which the project will be placed. Links with policies, programs and/or other projects should therefore be verified.

# Analysis of selection criteria – feasibility

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The second evaluation criterion (which Logical Framework Analysis helps to analyse) is **internal consistency, or vertical logic** (feasibility).

To verify internal consistency, the logical hierarchy (in terms of cause and effect) between the project results must be reconstructed. This will clarify the “intervention logic” underlying the project and identify any inconsistencies.



# Analysis of selection criteria – feasibility

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The following are therefore assessed:

- the **final beneficiaries** of the project
- the need to address **the problems identified** by the project and **which beneficiary they particularly affect**
- the ability of the results to express **the real benefit for the beneficiaries**, in the sense of a **substantial and lasting change**
- **the likelihood of the project** achieving the **expected results**, even in the long term



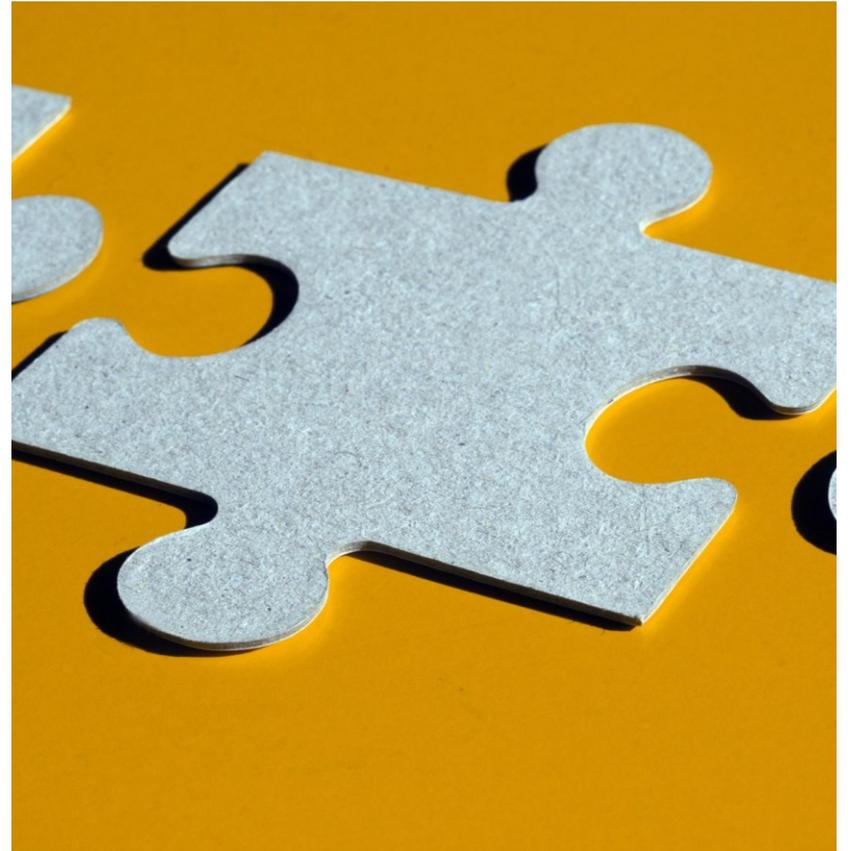
# Analysis of selection criteria – feasibility

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- the **logical consistency** of the project and its ability to achieve each of the set objectives
- the existence of **other factors or conditions, not included in the proposal, which contribute to achieving one of the objectives**

## Sustainability

A good project proposal must demonstrate, already at the planning stage, that by implementing those actions, with the appropriate resources, certain benefits are assured in a lasting way for the beneficiaries.



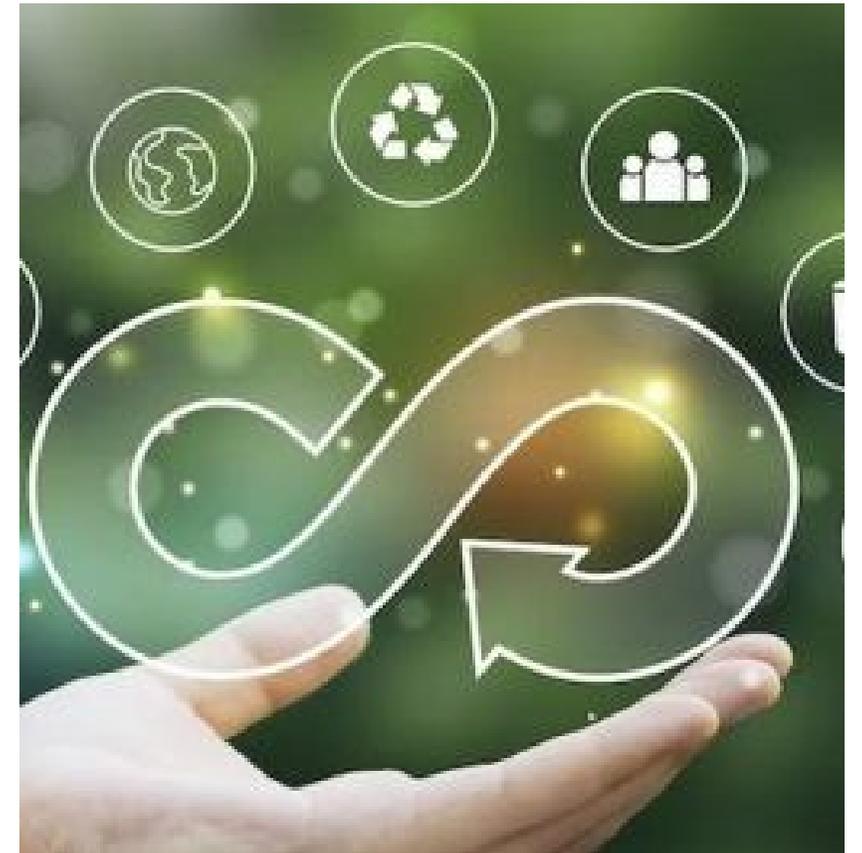
# Analysis of selection criteria – sustainability

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Sustainability does not mean that it is appropriate to continue financing the project with public funds even after the project has ended, but rather that with that financing, **the project creates a virtuous cycle** whereby the benefits for the beneficiaries will continue over time.

Therefore, in order to assess the sustainability of a project proposal, it is appropriate to verify whether it takes sufficient account of the following aspects:

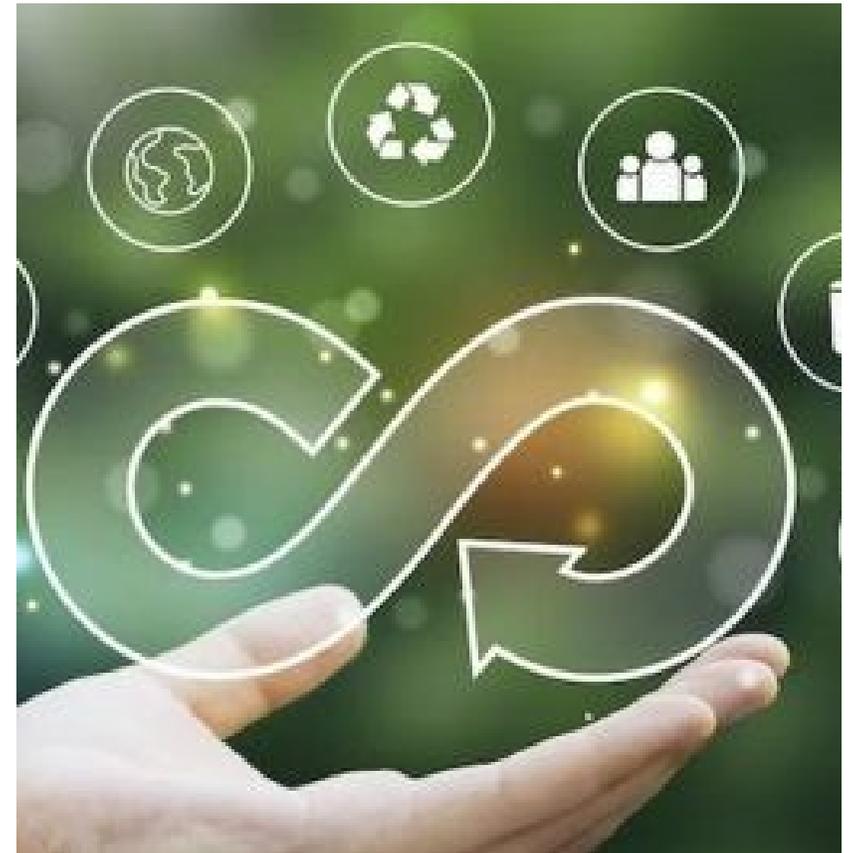
- **political support** for the project;



# Analysis of selection criteria – sustainability

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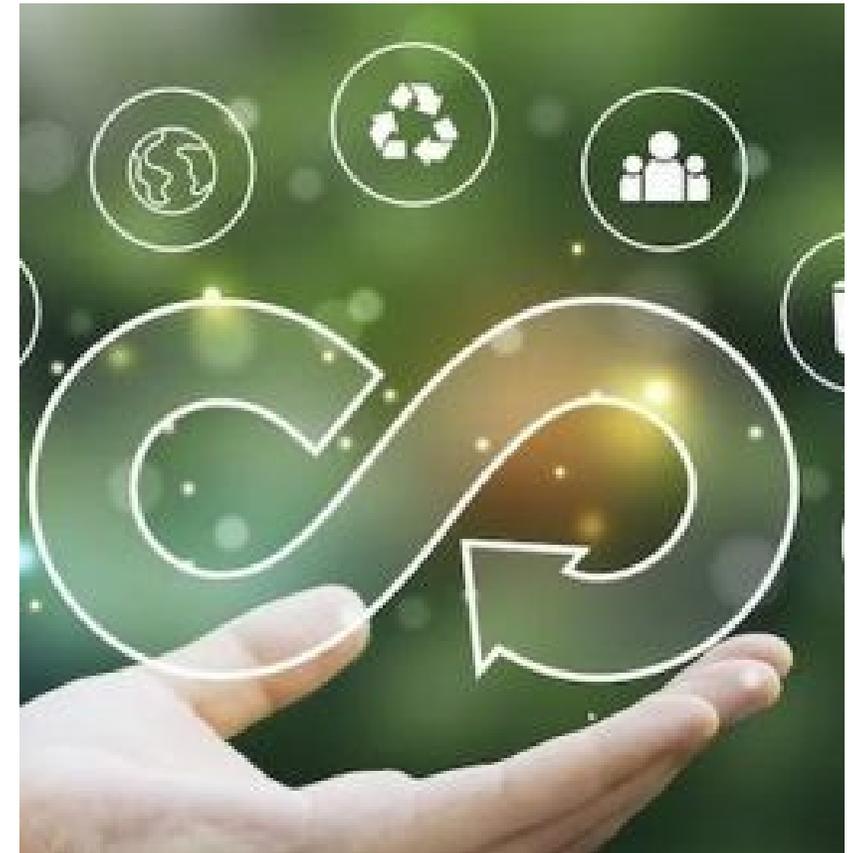
- The use of **appropriate technologies**: very often, especially in development projects, the achievement of a lasting benefit depends precisely on the use of certain technologies, which, however, may prove difficult for the beneficiaries themselves to manage;
- **Environmental protection**: if the benefit to the beneficiaries is achieved by depleting natural resources or damaging the environment, it is likely that this benefit will not be lasting;



# Analysis of selection criteria – sustainability

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- **socio-cultural or gender differences**: prejudices or cultural factors can often be a major obstacle to achieving stable benefits for beneficiaries (think of the status of women in certain countries around the world, or the difficulties faced by so-called disadvantaged groups in integrating into society and the labor market);
- **managerial skills**: projects that envisage the creation of entrepreneurial activities by beneficiaries may encounter considerable difficulties if their management skills are inadequate;



# Analysis of selection criteria – sustainability

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■ **Economic profitability:** this applies to projects where the benefits for beneficiaries derive from a “business idea”. The economic profitability of this idea must be examined during the ex-ante assessment phase.



# Evaluation phases

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There are three main stages in the evaluation process:

1. **Administrative/eligibility check** = administrative screening
2. **Qualitative assessment** = content screening
3. **Final ranking** = political/strategic screening



# The checklist for a call of proposals

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Example of a call for proposals:

[https://www.ita-slo.eu/sites/default/files/media/document/Standard%20Call%2003-2024\\_ITA\\_SLO.pdf](https://www.ita-slo.eu/sites/default/files/media/document/Standard%20Call%2003-2024_ITA_SLO.pdf)

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**INTERREG VI-A  
ITALIA-SLOVENIA  
2021-2027**

**BANDO PER  
PROGETTI STANDARD  
N. 03/2024**

**INTERREG VI-A  
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2021-2027**

**RAZPIS ZA  
STANDARDNE  
PROJEKTE ŠT. 03/2024**

# The checklist for a call of proposals

Call for standard projects n.  
03/2024

	<b>Deadline</b>
	<b>Partnership requirements</b>
	<b>Eligible costs</b>
	<b>Amount of financing</b>
	<b>Output indicators</b>
	<b>Financed activities</b>
	<b>Available resources</b>
	<b>Geographical area of intervention</b>
	<b>Particular conditions</b>
	<b>Retroactivity</b>
	<b>Notes</b>

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Deadline

**The deadline for submitting project proposals expired on 03/12/2024 at 13:00:59 pm (CET).**

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Partnership requirements

The partnership shall consist of at least one (1) partner per Member State of the IT-SI Program. The maximum recommended size of the partnership is six (6) partners. It is suggested that the partnership be balanced in terms of Member States.

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Eligible costs

**Staff costs**

**Administrative costs**

**Equipment**

**Infrastructures**

**Source:**

**[https://www.ita-slo.eu/sites/default/files/media/document/ITA\\_Programme\\_Manual\\_expenditures\\_ITA\\_vers4\\_14.10.2024\\_F.pdf](https://www.ita-slo.eu/sites/default/files/media/document/ITA_Programme_Manual_expenditures_ITA_vers4_14.10.2024_F.pdf)**

**PROGRAM MANUALE ON  
ELIGIBILITY OF EXPENSES**

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Amount of financing

The ERDF allocation for each project partner must not be less than EUR 50,000.00. The size of projects in terms of ERDF funding may reach a maximum of the allocation shown in Table 4 (see below). Under the IT-SI Programme, eligible project activities are co-financed by the ERDF at a rate of 80%. Slovenian beneficiaries cover 20% of the total costs from their own funds, while for Italian beneficiaries (public, public law bodies and private entities) co-financing is provided by the national Revolving Fund.

# The checklist for a call of proposals

Call for standard projects n. 03/2024

<b>PO/ISO CP/SCI</b>	<b>Dimensione massima del progetto (FESR €) Najvišja vrednost projekta (ESRR v €)</b>
<b>PO2-CP2</b>	850.000€
<b>ISO1-SCI1</b>	700.000€

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Output indicators

PO2 - CP2: page no. 18 - 19 of the call

ISO1 - SCI1: page no. 20 - 21 of the call



## Financed activities

PO2 – SO 2.4: page no. 16 of the call

ISO1 - ISO 1(b): page no. 16 - 17 of the call

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Available resources

The total ERDF contribution for SO 2.4 and ISO1 b available for this Call for Proposals is € 10,127,434.00, broken down as shown in the table below.

PO/ISO1 CP/SCI1	DOTAZIONE FESR (€) VIŠINA SREDSTEV ESRR (€)
2 - 2.4	7.858.867,00
ISO - SCI 1 (b)	2.268.567,00
TOT.	10.127.434,00

# The checklist for a call of proposals

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Call for standard projects  
n. 03/2024



## Geographical area of intervention

- 5 Italian statistical regions – NUTS 3 (which coincide with the provinces of Venice, Udine, Pordenone, Gorizia and Trieste) and
- 5 Slovenian statistical regions – NUTS 3 (which coincide with the regions of Primorsko-notranjska, Osrednjeslovenska, Gorenjska, Obalno-kraška and Goriška).

The NUTS 2 regions of the IT-SI Program are: Veneto and Friuli-Venezia Giulia in Italy and Vzhodna kohezijska regija and Zahodna kohezijska regija in Slovenia.

# The checklist for a call of proposals

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Call for standard projects  
n. 03/2024

	<u>Particular Conditions</u>
	<p><u>Retroactivity</u></p> <p>Preparatory costs are granted to cover all costs incurred prior to the submission of the project proposal, such as travel and staff costs involved in planning, meetings and drafting the application</p> <p>Project preparation costs, where applicable, are reimbursed by applying a lump sum equal to:</p> <ul style="list-style-type: none"><li>- € 9,000.00 for standard projects (including <u>capitalisation projects</u>) and strategic projects;</li><li>- € 4,500.00 for small projects, <u>i.e.</u> projects with a budget of less than € 200,000.00.</li></ul>

# The checklist for a call of proposals

Call for standard projects n. 03/2024



## Notes

**Maximum project duration: 24 months**

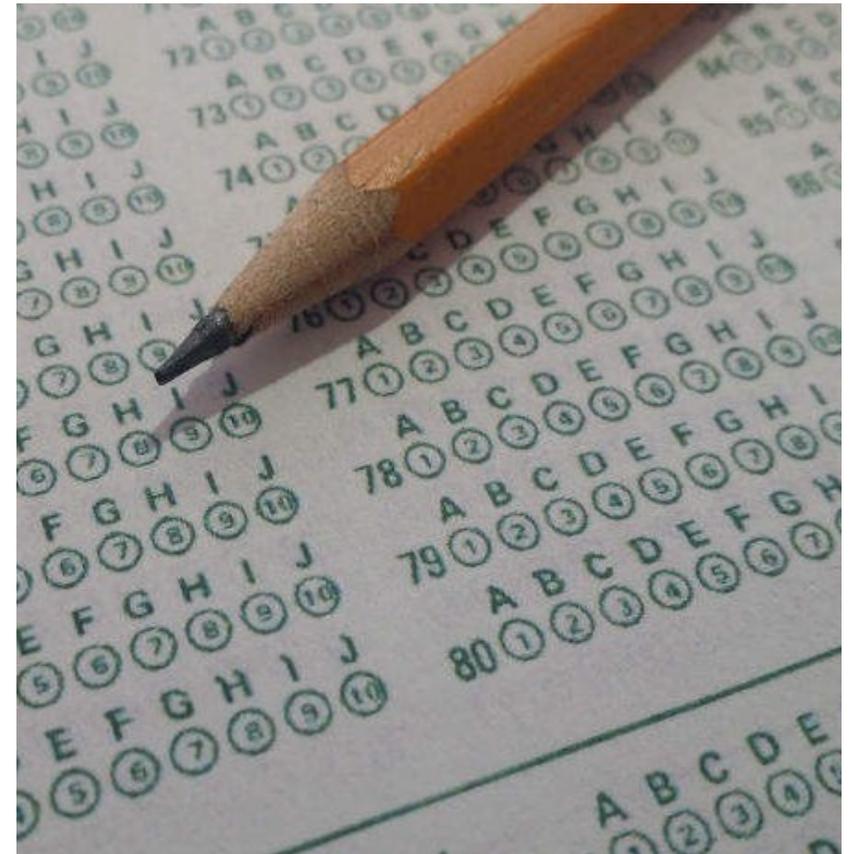
**Check the attachments required for each type of partner and the need for a digital signature**

# End-of-course exercise

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Based on what has already been developed in the Logical Framework Matrix exercise, develop a project idea with reference to call for proposals no. 3/2024 using the project sheet (source: Andrej Bertok) that will be provided together with the lesson teaching materials.

Presentation of project proposals by each group: **Friday 12 December.**



# End-of- course exercise

## PROJECT IDEA SHEET

**Title and acronym of  
the project**

### DESCRIPTION OF PROJECT IDEA

**Description of the project/needs analysis \***  
(500 - 2.000 characters)

**Description of the context in which the project is carried out**  
(500 - 2.000 characters)

# End-of- course exercise

**Description of the context in which the project is carried out**

**(500 - 2.000 characters)**

**Specific objectives of the project \***

**(500 - 2.000 characters)**

# End-of- course exercise

## WORK PLAN \* (IN CHRONOLOGICAL ORDER)

<b>WP 1</b> <b>Output</b> <b>(500-2.000 <u>characters</u>)</b>	
<b>WP 2</b> <b>Output</b> <b>(500-2.000 <u>characters</u>)</b>	
<b>WP 3</b> <b>Output</b> <b>(500-2.000 <u>characters</u>)</b>	
<b>WP 4</b> <b>Output</b> <b>(500-2000 <u>characters</u>)</b>	
...	

# End-of- course exercise

## OTHER INFORMATION

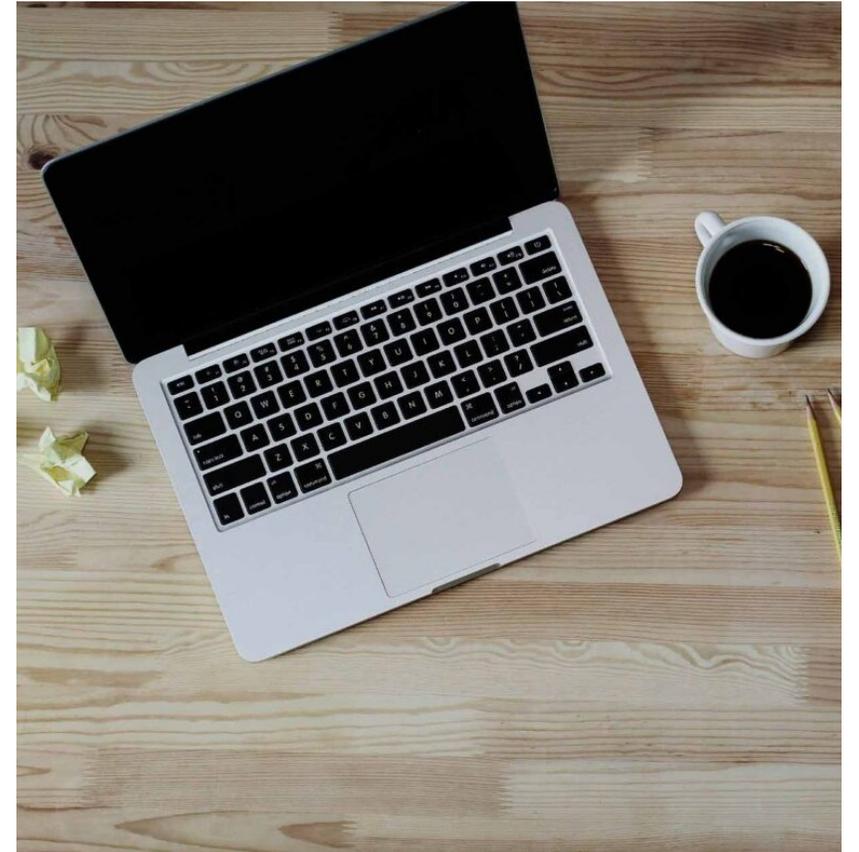


<b>Partnership*</b>	
<b>Duration*</b>	
<b>Budget*</b> Indicate the items of expenditure (for example equipment, consultancies, staff) necessary to carry out the project and the relative amounts.	

# Final tips for drafting the project

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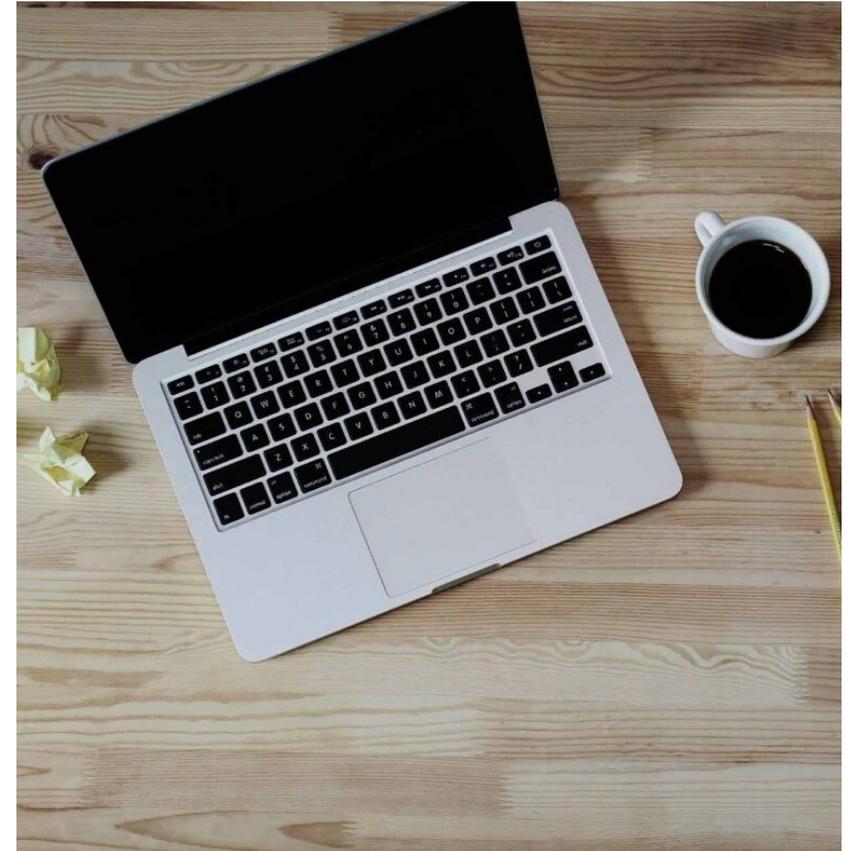
- Be concise and clear, but describe everything, respecting the text length limits;
- Good English;
- Get yourself a good proofreader;
- Read the evaluation report with humility; it is a great opportunity for professional growth. Do not give up.



# Final tips for drafting the project

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- Study the call, work program and guidelines thoroughly;
- Build a strong partnership;
- Act in good time;
- Comply with the PCM;
- Write the project with the evaluation criteria in mind;
- Be ambitious, but remember that you will also have to implement the project..



# The project contracts

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Contracts in European projects include:

- **A contract between the funding body and the coordinator** (who represents the partnership). This contract, called funding contract or **Grant Agreement**, contains all the essential information such as the start and end dates of the project, the amount of funding granted and how it will be disbursed, the project budget, eligible expenses, reporting procedures, the obligations of the Lead Partner or Coordinator, the obligations of the managing authority or funding body, etc.

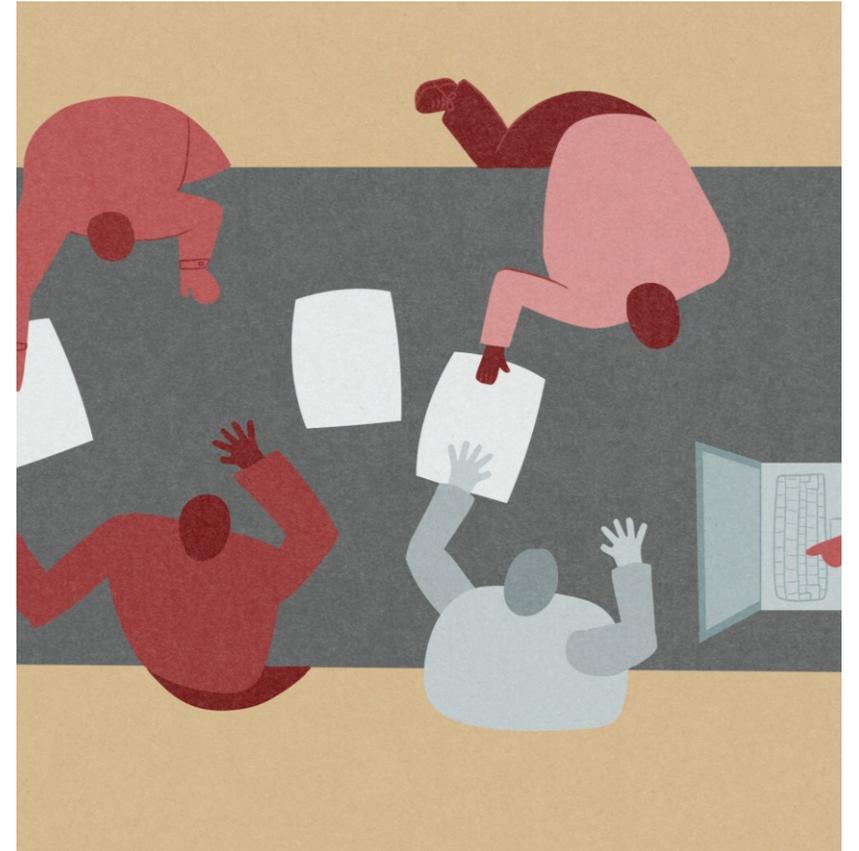


# The project contracts

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Contracts in European projects include:

- **A contract between the coordinator and the partnership.** This contract, called partnership contract or **Consortium Agreement**, contains all the fundamental information for the functioning of the partnership, such as the obligations of the Lead Partner or Coordinator, the obligations of the project partners, the management of financial flows, changes to the project (amendments), measures relating to information and communication activities and dissemination of results, management of intellectual property, the competent court for disputes, etc..



# Template of the Grant Agreement

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**Interreg**  
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 Co-finanziato  
dall'Unione europea  
Sofinancirano  
Evropska unija

 2021  
2027

**INTERREG VI-A  
ITALIA-SLOVENIA  
2021-2027**

**INTERREG VI-A  
ITALIJA-SLOVENIJA  
2021-2027**

**BANDO PER  
PROGETTI STANDARD  
N. 03/2024**

**RAZPIS ZA  
STANDARDNE PROJEKTE  
ŠT. 03/2024**

**Modello di contratto di  
concessione del  
finanziamento  
tra l'Autorità  
di Gestione e  
il Lead Partner**

***Vzorec pogodbe o  
dotaciji  
sofinanciranja  
med Organom  
upravljanja in  
Vodilnim partnerjem***



# Template of the Grant Agreement

## TABLE OF CONTENTS

- Article 1 Legal basis
- Article 2 Subject matter of the Agreement and allocation of funding
- Article 3 Amount of funding and State aid
- Article 4 Duration of the project
- Article 5 Eligible expenses
- Article 6 Reporting and reimbursement requests
- Article 7 Indicators
- Article 8 Project modifications and reallocation of funds
- Article 9 Obligations of the Lead Partner
- Article 10 Obligations of the Managing Authority
- Article 11 Recovery of unduly paid sums
- Article 12 Visibility, transparency and communication

# Template of the Grant Agreement

## TABLE OF CONTENTS

- Article 13 Ownership and use of project results
- Article 14 Suspension and withdrawal of funding
- Article 15 Transfer and legal succession
- Article 16 Registration
- Article 17 Languages
- Article 18 Disputes
- Article 19 Final provisions



# Template of the Partnership Agreement

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# Template of the Partnership Agreement

## TABLE OF CONTENTS

Article 1 Legal Basis

Article 2 Subject Matter of the Agreement

Article 3 Duration of the Partnership Agreement

Article 4 Obligations and Responsibilities of the Lead Partner

Article 5 Obligations and Responsibilities of the Partners

Article 6 Relations with Third Parties

Article 7 Transfer and Legal Succession

Article 8 Financial management

Article 9 Eligible expenses

Article 10 Financial statements

Article 11 Project modifications and reallocation of funds

Article 12 Recovery of unduly paid sums

# Template of the Partnership Agreement

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Article 13 Measures relating to visibility, transparency, communication and dissemination of results

Article 14 Ownership and use of project results

Article 15 Liability and force majeure

Article 16 Registration

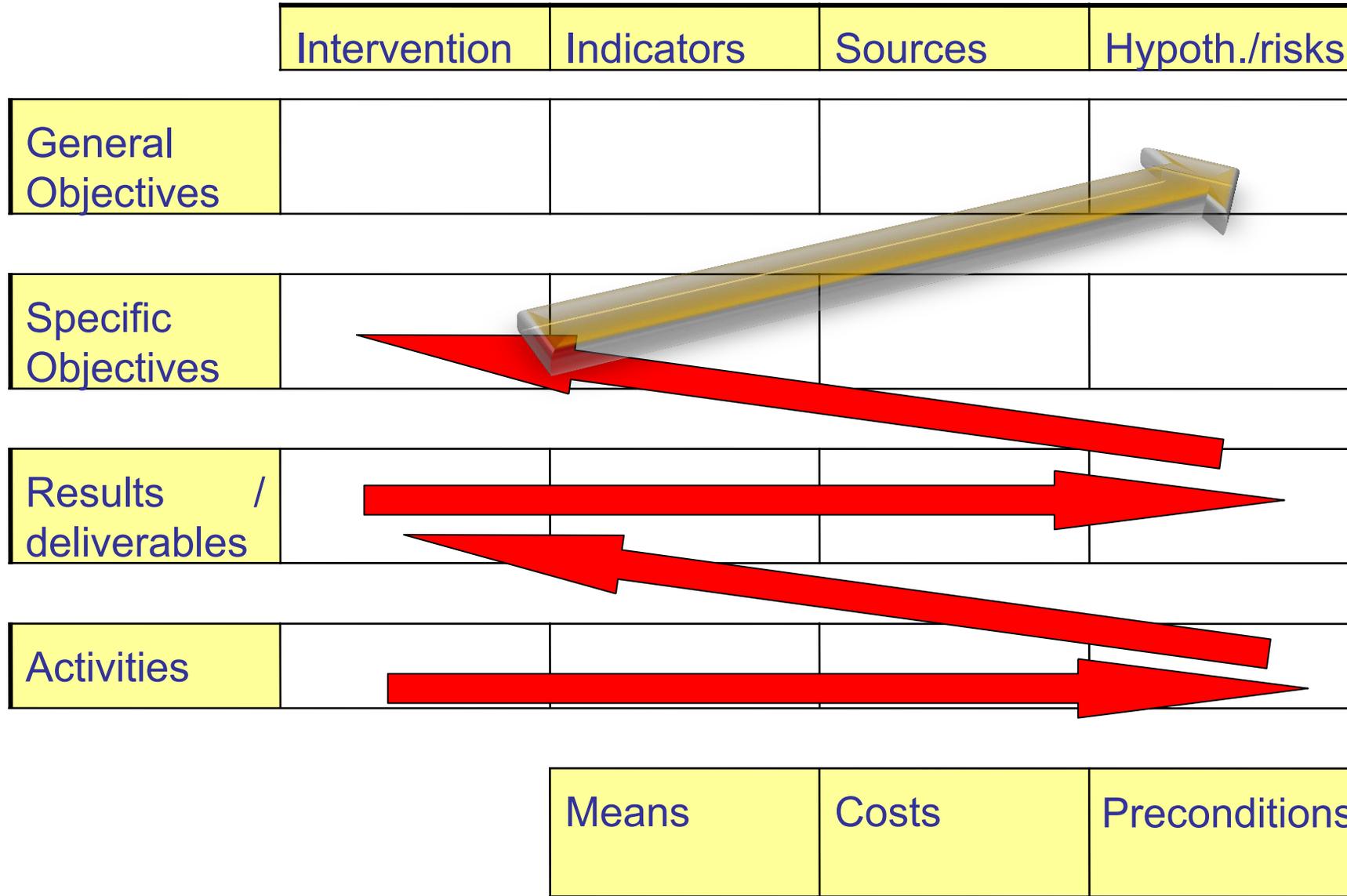
Article 17 Languages

Article 18 Jurisdiction

Article 19 Final provisions



# Project implementation



# The project implementation

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- The logical framework matrix is an excellent guide;
- The logical framework matrix must be constantly updated.

# Some practical advice for coordinators

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- Monitor partners closely;
- Deadlines will always tend to be extended;
- Take care over meetings; they should not be a mere formality. Select the topics to be discussed carefully and consider dividing participants into groups;
- Maintain good relations with the project officer and understand their priorities.



*Thank you for your attention!*

*Elisabetta Boglich Perasti, PhD*

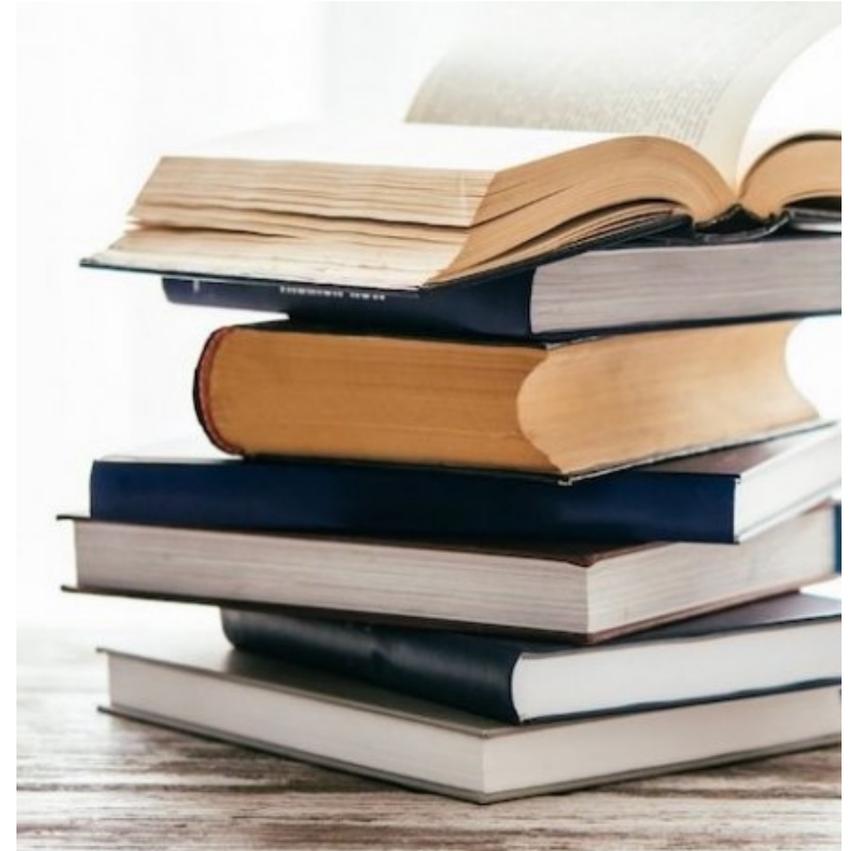
*[elisabetta.boglich@dispes.units.it](mailto:elisabetta.boglich@dispes.units.it)*

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Project Cycle Management  
Manuale per la formazione  
Formez –“Strumenti”

Project Cycle Management: Manual  
European Commission, Europeaid Co-operation  
Office, General Affairs, Evaluation, March 2001  
[https://op.europa.eu/it/publication-detail/-  
/publication/58c406ab-f247-47df-8d77-a7b003e00faf](https://op.europa.eu/it/publication-detail/-/publication/58c406ab-f247-47df-8d77-a7b003e00faf)



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<http://focus.formez.it/content/testi-corso-project-cycle-management-e-project-management>

Project Cycle Management

Course in 'European Project Design Techniques'

Dr. Fabio Tomasi

Consortium for the Scientific and Technological Research Area of Trieste

