

The New Monitoring and Reporting Framework 2021-2027

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Monitoring and Evaluation SF
ECA Course
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Preserving some key monitoring features - moving from 2014-2020 to 2021-2027

- **Result-orientation** of programmes - use of result indicators, with modification → outcomes/changes for beneficiaries
- **common indicators** (again compulsory), plus programme-specific indicators where necessary
- **Performance Framework** → reformed, more flexible
- **Intervention categories** - climate change % target

Monitoring Framework 2021-2027

- Annual Report (AIR) X GONE
- Performance Reserve X GONE
- Performance Review X GONE
- Annual Review Meeting (MS-EC) becomes
- **Annual Performance Review (MS-EC) →**
- **closer data monitoring every 2 months**
 - **transmission of financial data, PLUS...**
 - **Performance Framework data - indicators**

Annual Performance Review, 2021-2027



MS to:

- Follow up issues agreed at review meeting
- inform EC of measures taken within 3 months

“Real Time Reporting”, 2021-2027



Transmission of data, 2021-2027 (Annex VII, draft CPR)

by Specific Objective.....

- 5x per year Financial information (3 elements)
 - 2x per year physical indicators
- Progress of Expenditure: BY INTERVENTION TYPE (planned exp. in Prog)
 - planned expenditure of approved operations
 - expenditure declared by beneficiaries in payment claims
 - number of operations
 - Financial Instruments eligible expenditure

Outputs – Milestone (2024), Target, Progress

Results – Baseline, Target (2029), Progress

- Annex VIII: Annual Forecast (end Jan; end July)
 - forecasts of EU contribution in payment applications - current and subsequent financial years

intervention categories & targets

- indicative breakdown of expenditure by intervention field, with climate change co-efficient (2014-2020)
- more intervention fields in 2021-2027 (182)
 - to reflect experiences and new EU objectives
 - grouped by Policy Objective (but not exclusive to)
 - PLUS 5 fields - FAST CARE Amending Reg. – phased operations from 2014-2020: landfill, airports, energy/gas networks, large ent. green inv.
- ... a categorisation of financial inputs

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- tracking coefficients (100%, 40%, 0%) to be applied to intervention fields
 - revised climate change objective co-efficients.... PLUS new environmental objective co-efficients
 - stricter rules to achieve climate change TARGET % of support (Art. 6 CPR):
 - ERDF: 30%
 - Cohesion Fund: 37%

PF and Indicators, 2021-2027

- Performance Framework in programme is modified:
 - split - level of SO (not by Priority in one table)
 - by SO: tables split into OUTPUTS table; and RESULTS table
 - SPEND is removed from PF.....
- all indicators are part of new PF.....common and programme-specific
- *progress reporting... but targets more flexible, especially for results. A helpful, “living” document...*
 - *...no Performance Review process*
- note that ongoing Progress reporting is updating the DG REGIO Open Data Platform (linked to Transmission of Financial Data requirement) **PLUS** the outputs and result indicators

Performance Framework, 2021-2027: Split tables at level of SO

e.g. ESF: Priority 1 OUTPUTS	Indicators (and unit of measurement)	Milestones for end 2024	Targets for end 2029
SO1	▪ Output - no. of trainees (by age group etc.)	▪ Output;	▪ Output;
	❖ Common AND programme-specific indicators		

ESF: Priority 1 RESULTS	Indicators (and unit of measurement)	Baseline or Reference Year	Targets 2029
SO1	▪ Result - no. with jobs; no. active in labour market	▪ Result;	▪ Result;
	❖ Finance (spend) excluded here ❖ No Key Implementation Steps for ERDF/CF	(Note: result milestones not required)	

PF and Indicators, 2021-2027

- common indicators coverage wider for ERDF/CF:
 - 97 common output indicators (*by SO, but can be for multiple SOs*)
 - 66 common result indicators added for ERDF/CF
- *NB: results = direct results/outcomes for beneficiary, rather than longer-term/wider results/impacts*
- reduce number of programme-specific indicators
- fewer common indicators for ESF+
- ESF: use registers for ESF data; less reliance on questionnaires, which are a burden to get data
- PF provides one part of Mid-term Review (MS) – progress to milestones – allocation of flexibility amount

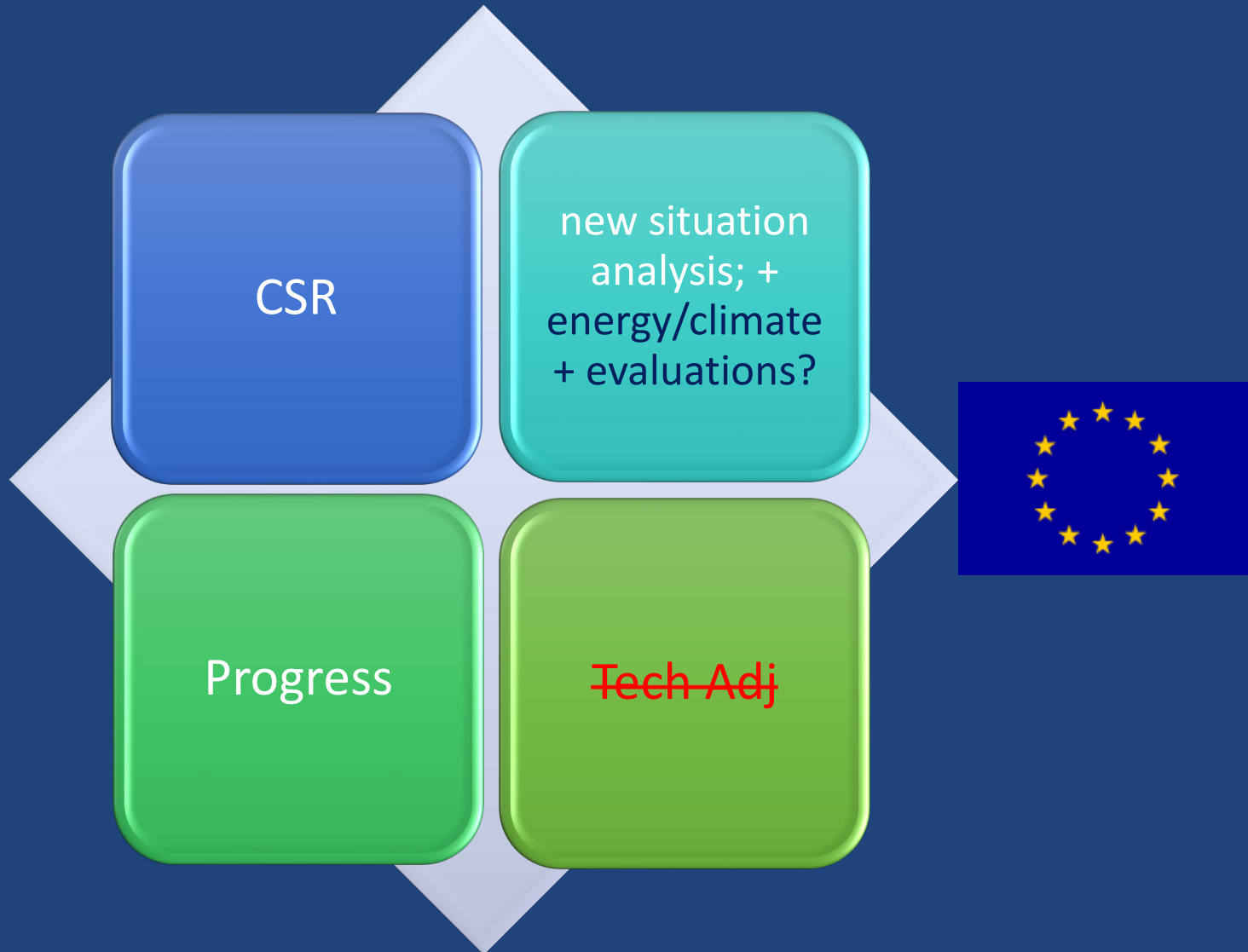
Setting Milestones and Targets

- PF indicators to cover much more expenditure than before (ESF+ should cover 100%)
- **document: criteria for selecting indicators; calculation method**
- **milestones and targets – other factors of influence?** (*Use unit cost benchmarks?*)

revision of targets... in line with financial allocation revision /MTR

- *account for forecast profile of expenditure of priority / SO*
- *account for MINIMUM expenditure in order to avoid n+3/n+2 automatic de-commitment*

Mid-term Review, 2024-2025



Role of the Monitoring Committee



- ❖ within 3 months of Programme decision
- ❖ approves project selection method & criteria
- ❖ approves AIR
- ❖ approves amendments to Prog.
- ❖ ~~approves Communication strategy (for OP or multiple OPs)~~
- ❖ approves Evaluation Plan
- ❖ meet at least once a year
- ❖ *Commission participates in an advisory capacity*

Role of the Monitoring Committee

- ❖ review and examine issues affecting progress towards Programme objectives
- ❖ examines:
 - ❖ implementation progress and
 - ❖ progress to milestones and targets
 - ❖ measures taken to address issues
 - ❖ progress of evaluations and follow-up actions
 - ❖ Prog. contribution to CSRs
 - ❖ implementation of communications and visibility actions
 - ❖ progress implementing FIs and OSIs
 - ❖ ongoing fulfilment of ENC



Final Performance Report, 2021-2027

- MA to send Final Performance Report to EC by 15 Feb 2031
- Reaching **programme objectives** ...incl milestones and targets
- Issues affecting performance
- Contribution to CSRs?
- Findings of evaluations
- OSI progress
- EC has 5 months – observations – MS has 3 months to provide any further info, before acceptance



OUTPUTS	RESULTS
Number of enterprises supported (grants, FI, etc)	# jobs created; # research jobs private investment levered
# researchers supported; # SMEs investing in smart skills etc	# SMEs introducing product or process innovations; other innov
# public bodies supported to develop digital services, processes	# users of upgraded public digital services etc
# dwellings / public buildings with improved energy performance	Energy consumption of dwellings / public buildings
Additional production capacity of renewable energy	Renewable energy produced
# km of pipes for collecting waste water; new capacity for WW treatment	Population connected to WW treatment
Capacity new social housing, care facilities	# users new social housing, care facil.
# cultural and tourism sites supported	# visitors to cultural and tourism sites
Surface area of rehabilitated land supported	Rehabilitated land used for green areas, social housing, econ use

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