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# How to plan your budget and project management?

**Ilaria Piazza**

Interreg Europe Secretariat

[i.piazza@interregeurope.eu](mailto:i.piazza@interregeurope.eu)

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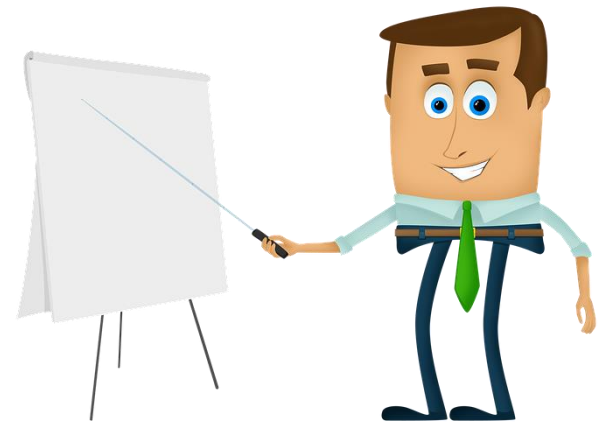
# Session content

1. Preliminary considerations
2. Management
3. First level control
4. The budget lines
5. Points of attention
6. Lump sum for phase 2





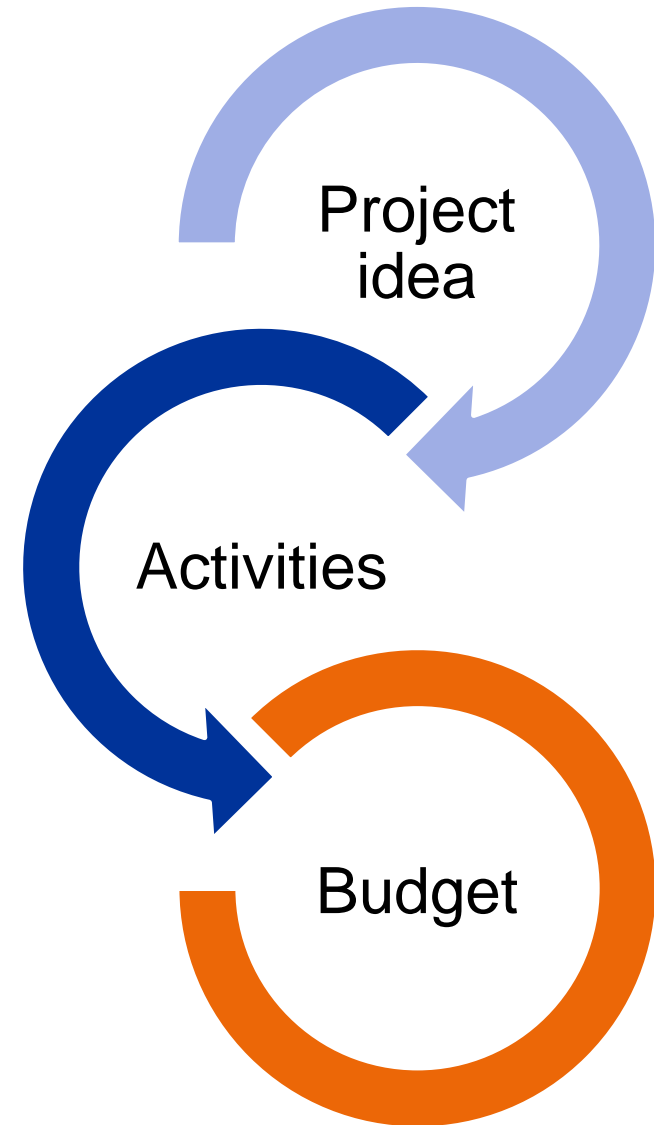
# 1. PRELIMINARY CONSIDERATIONS





# Recommendations

**First activities,  
then budget planning**



# Recommendations

A close-up, slightly blurred photograph of a person's hands holding an open book. The person is wearing a brown sleeve. The book's pages are white with black text, which is out of focus. The background is a soft, out-of-focus mix of green and yellow, suggesting an outdoor setting.

**Read the programme manual**



# Recommendations

Involve  
partners in  
the  
preparation

Ensure same  
objectives for  
all partners

Define roles  
clearly and  
balance  
inputs

Establish  
effective internal  
communication





## 2. MANAGEMENT



# Section C.8 Management

[Home](#) > [C.8 Management](#)

A Project Summary

B.1 Partners

B.2 Policy Instruments

C.1 - C.5 Project Description

C.6 Expected r

C.7 Horizontal principles

**C.8 Management**

D.1 Phase 1

D.2 Phase 2

E Project budget

Save

Check

## C.8.1 Management arrangements

Describe how the management and coordination on the strategic and operational level will be carried out in the project.

## C.8.2 Project coordinator

Will project management be externalised?

Please select

## C.8.3 Finance manager

Will financial management be externalised?

Please select

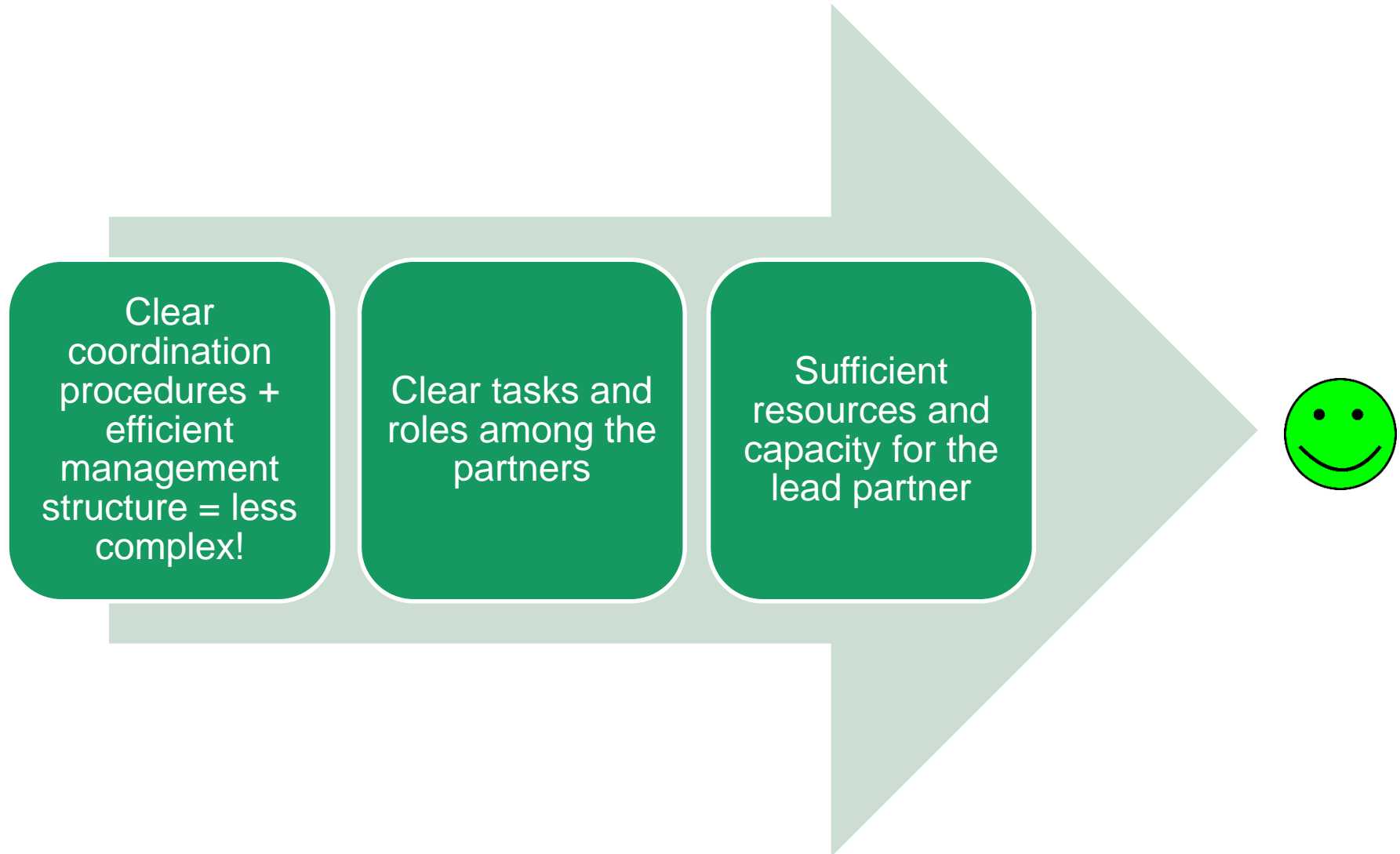
## C.8.4 Communication manager

Will communication management be externalised?

Please select



# Section C.8.1 Management arrangements





Regular steering group meetings



- Relevant documents available and easily accessible





# Work plan

1. Activities for phase 1 **to be filled** per semester in section D.1
2. Activities for phase 2 **already pre-filled** in section D.2:  
no particular management and coordination activities - 1  
progress report per 12 months



## 3. FIRST LEVEL CONTROL





# What is first level control ?

- All expenditure reported to be certified by an independent controller, before submission to the JS
- Organisation of this control = Partner State responsibility



# The different FLC systems

## First Level Control

Centralised

public controller

private controller

Decentralised

shortlist

proposed by  
partner and  
approved by PS



**Budget for first level control, if FLC system is:**


- decentralised
- centralised and not free of charge


**No specific role for the lead partner FLC**







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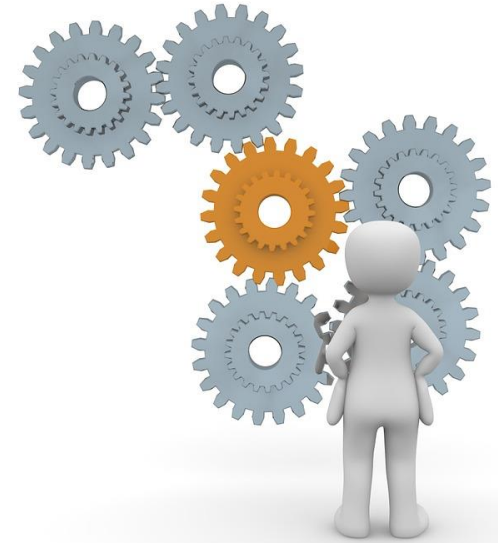
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# Results of the third call announced!

54 new projects were approved under the third call.

See the full list

SHARE   



## 4. THE BUDGET LINES



# The budget lines

- Staff
  - Administration costs
  - Travel and accommodation
  - Equipment
- 
- External expertise and services

Only for staff  
directly employed  
by the partner  
organisations

# Staff costs



- Only staff employed by the partner institution
- Usually the largest share of the budget



No sub-partners

# Administration costs



- Flat rate of 15% of staff costs
- Automatic calculation in the online application form
- Includes: office rent, utilities, office supplies, general accounting, etc.



# Travel and accommodation

- Only staff employed by the partner institution
- Includes: travel cost, meals, accommodation, visa, daily allowances
- Trips outside the programme area planned and justified in the application form




# Equipment



- Purchased, rented or leased
- Mainly office equipment for project management
- Not exceeding EUR 5,000-7,000 per project
- Must be planned in the application form



# External expertise and services

- Services outside the partner organisation
- Below 50% of total budget 
- Clear links to the work plan and the role of the partner – consistency activities vs budget!





# External expertise and services

## In-house costs

- if affiliated organisation is a different legal entity  
→ external expertise (costs reimbursed by partner)
- if service provided by an internal department of same legal entity  
→ NOT external expertise, BUT staff costs



## **5. POINTS OF ATTENTION**



## Travel costs of external stakeholders

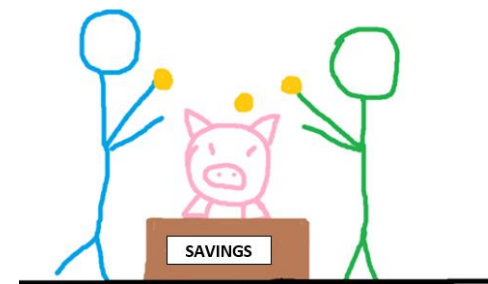
- Realistic
- Quantified





**If partners address same policy instrument, savings expected for joint activities e.g.**

- Travel costs external stakeholders
- External support to develop the action plan
- Costs for stakeholder meetings





## Provided by the programme!

- Hosting of project websites
- Logos
- Poster design





Preparation  
costs = EUR  
15,000 lump  
sum

Contracting  
partner  
principle –  
no shared  
costs

No budget split  
per component  
/ work  
packages

Travel and  
accommodation  
often  
overestimated

Source of funding:  
is the partner  
contribution  
coming from public  
or private  
sources?



# Spending plan

- Amounts **paid out** per semester
- Lower spending in the beginning, usually increasing towards the end of phase 1
- Decommitment risk
- **Phase 1: lion's share**



**Phase 2: lump sum!**





**NEW**

## **5. LUMP SUM FOR PHASE 2**





## **Phase 2 = monitoring of action plans' implementation**

**Limited duration  
= 1 year**

**Pre-defined  
activities and  
outputs**



# Lump sum – phase 2

Number of  
policy  
instruments/  
action plans  
monitored

Average  
amount per  
policy  
instrument =  
**EUR 17,000**



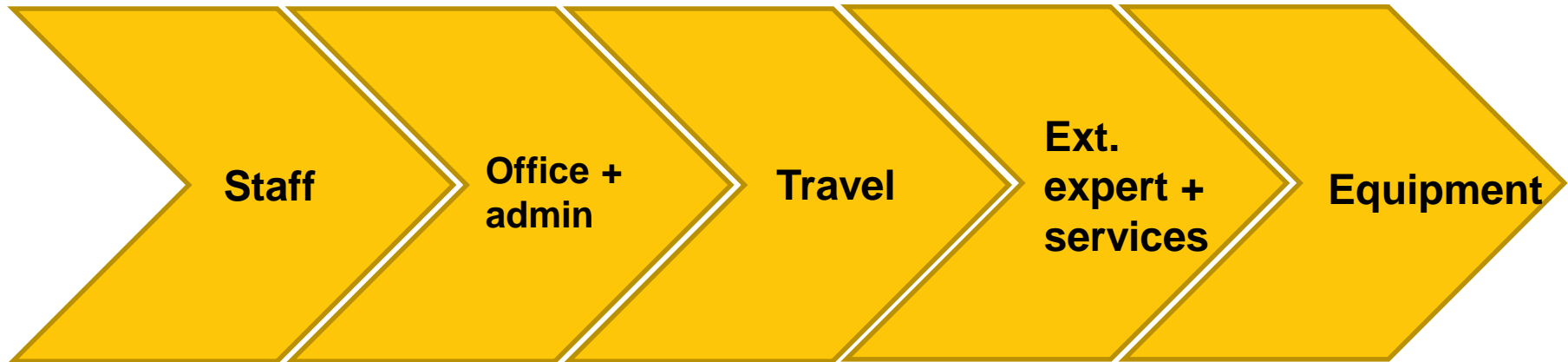
# Allocation to LP for entire project



- Partners share internally in line with different cost levels + roles in project (LP, final conference organizer, advisory partner)
- If outputs are delivered, lump sum added to LP expenditure in last PR and corresponding ERDF / NO funding paid (ERDF: 85%, NO funding: 50%)



# All costs covered



# Outputs





- **Phase 1** – fill in the budget
- **Phase 2** - no budget to fill in, lump sum integrated in AF if project is approved, before contracting

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# Thank you!

Questions welcome



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