EDIH

The project review process

What will happen at month 18 of your project and how to prepare

The legal provisions (from the model Grant Agreement)

The granting authority may carry out reviews on the proper implementation of the action […] **assisted by independent, outside experts** […] the coordinator or beneficiary concerned will be informed and have the right to **object on grounds of commercial confidentiality or conflict of interest**.

The coordinator or beneficiary concerned may be requested to **participate in meetings, including with the outside experts**. For on-site visits, the beneficiary concerned must allow access to sites and premises (including to the outside experts) and must ensure that information requested is readily available.

Information provided must be accurate, precise and complete […] On the basis of the review findings, **a project review report will be drawn up.** The granting authority will formally **notify the project review report to the coordinator** […] which has 30 days from receiving notification to make observations.

Project reviews (including project review reports) will be **in English**.

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Objectives

1. Ensuring that EU money is correctly spent (control)

2. Discussing issues to bolster project improvement (support)

…and do not hide the problems! The review is meant to help the project, not to punish it

Practical steps

1. The Project Officer and Coordinator agree on a **date for the project review meeting**

2. The Project Officer identifies three **external Experts**, at least one of which will be a **"country expert"** (from the same country of the EDIH) and informs the Coordinator

3. The Coordinator verifies with the other partners that there is **no conflict of interest** and accept the names of the Experts (if there is a conflict of interest, the PO will propose another expert)

4. The "**periodic report**" session is opened in the "funding and tender" portal, and the Consortium can **submit the deliverables, including a draft cost statement**

5. The Experts and the PO **read and assess the deliverables**

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Preliminary steps – synergy funding

N.B.: Synergy funding or co-funding must be clarified and settled before the end of the 1st reporting period.

ERDF synergy funds:

- If synergy Grant Amendment is NOT signed before the end of the first reporting period, an amendment to extend the reporting periods **will NOT be implemented**, unless specifically requested by the individual EDIHs.
- When the reporting will be opened automatically in the system the **Coordinator shall not submit**.
- The review process can go ahead as normal using the **draft budget figures.**

Situation to be avoided:

Submission without having processed the amendment introducing the synergy clause, while waiting for the approval of payment from the managing authority, because the costs **may be INELIGIBLE**.

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Preparatory steps

- Costs can be formally submitted up to 60 days after the end of the Periodic report. However, it is important to discuss costs during the Review meeting, so the Consortium should present a **draft cost statement.**

- It is **strongly recommended** to make available a **DRAFT of the periodic report** (possible without all the cost details) **BEFORE the review meeting,** ideally **three weeks** before it.

- The periodic report consist of Part A (planned and actual financial figures) and Part B (descriptive). While Part B should/can be available earlier, the final content of Part A should be available within the deadline above.

- The Grant Agreement has also Part A and Part B. The latter one should be provided as a reference.

- Please note that the Coordinator has the **responsibility to provide all documentation to the experts** (including deliverables, slides, Grant Agreement Part B, supplementary information, etc.).

Links: periodic-report_dep_en.pdf (europa.eu) and Continuous reporting on milestones & deliverables - Online Manual - Funding Tenders Opportunities (europa.eu)

Practical steps – Review meeting (typical)

1. The review meeting is a **(hybrid) meeting** held in the premises of the EDIH; the Experts will be physically present, while the Project Officer might attend remotely, ideally lasting half a day or a full day

2. Invitation has to be extended to National authority, Consortium partners, SMEs, others…

3. The **PO and Coordinator agree on** an **agenda** of the meeting, which will include:

    - Introduction by the PO: scope of the review meeting, objectives, procedure

    - Executive summary on the main accomplishments of the project and the main challenges

    - Detailed discussion of the individual work packages

    - Review meeting will include discussion on Key Performance Indicators (KPIs) and Digital Maturity Assessment (DMA), as well as success stories, best practices, methods reaching clients, feedback from EDIH.

4. At the end of the review meeting, after a private session with the Experts, the Project Officer will provide an **informal feedback** to the Consortium

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Practical steps – Review meeting (Cluster)

1. A "**Cluster**" review is an event in which several related projects are reviewed together in a short period of consecutive days. It is managed on a case-by-case basis, below are only the generally applicable concepts.

2. It can include **common sessions** in which common issues, accomplishments and collaborations are discussed, and **private sessions of about 4 hours for each project**, in which the specific project issues are analysed in detail

3. It may be associated to a public dissemination event, social media activity, etc.

4. Typically, for a cluster review the Project Officer attends the meeting on-site (not remotely)

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Practical steps – Timing

- All the EDIH grants have a **duration of 36 months** with an **intermediate review at month 18**

- **Some EDIH ask for a rescheduling / extension**

    - e.g.: because the project could not start as planned or amendment on (co-)funding has been introduced
    N.B.: funding changes must be clarified and settled before the review process

- **This is possible, but please:**

    - Discuss with your PO

    - Be reasonable (let's limit the delay)

    - Ideally, try to have a common review date at country / region level (cluster review)

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Timeline

Timeline may change based on contingent circumstances, however, ideally:

- Within (+/-) **60 days** after the end of the reporting period the **Review meeting** shall take place

- 6/8 weeks before the Review meeting, Experts should be selected, and contract signed, together with agreement on date for the Review meeting

-**3 weeks** before the Review meeting, the periodic report should be submitted together with **deliverables and costs**

- During the Review meeting an **informal feedback** will be provided by the PO

- Normally within **2 weeks**, the official **review report** will be sent to the Coordinator and to the National funding agency. The review report will include **recommendations to be implemented** in the next reporting period

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What we measure (from the Work Programme)

Outcomes and deliverables

At the end of the project, a balanced network of EDIH will cover all regions in Europe, addressing the needs of the public and private sectors, including all economic sectors, offering a wide range of specialised digital transformation services.

The following indicators will be used to evaluate the performance of the hub; proposals should define their targets related to each of them:

- Number of businesses and public sector entities, which have used the European Digital Innovation Hubs' services, by user category (businesses of different sizes, public sector entities, etc.), sector, location and type of support received. Where relevant, this will include a description of which Digital Europe Programme capacities have been used.
- For access to finance: amount of additional investments successfully triggered (e.g. through venture capital, bank loan, etc.).
- Number of collaborations foreseen with other EDIHs and stakeholders outside the region at EU level, and description of jointly shared infrastructures / joint investments with other EDIH.

A set of additional impact indicators will be collected and analysed with the support of the Digital Transformation Accelerator:

- Increase in digital maturity of organizations that have used the services of the EDIH network. Digital maturity will be defined on the basis of a questionnaire developed by the Joint Research Centre assessing the categories digital strategy and readiness, intelligence and automation, data and connectedness, green and human-centric digitalisation[15]. The green digitalisation category will focus on the use of digital technologies to improve environmental sustainability and the inclusion of circularity in value chains.

- Market maturity and market creation potential of innovations, as defined in the JRC's Innovation Radar methodology[16].

We basically measure the services that EDIH delivered to their customers

Performance Indicators in the DTA portal

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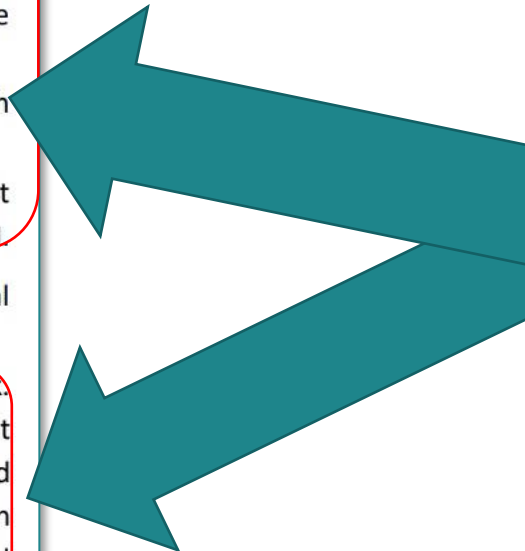
Assessment elements:

What to provide obligatorily before the review meeting:

- **Deliverables**
- **Milestones**
- Critical **risks**
- **KPI**s*
- Digital Maturity Assessment (**DMA**)*
- Draft **costs** statement
- Draft of **Periodic report**

* export your data from the DTA website and include them in a report

What will be discussed additionally during the review meeting:

- **Degree of work plan accomplishment** and deliverables achievement
- Integration of **beneficiaries' contributions**
- Anticipated economic, competitive, and **social impacts**
- Eligibility of claimed **costs**
- **Compliance** with Grant Agreement obligations
- Role in National and European **EDIH ecosystem**
- Method of reaching the clients (i.e. **SME**s)
- **Success stories** and **best practices**

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Deliverables & reports

Deliverable/report	Draft for review?	Final for review?	Final document necessary for payment?
Deliverables of Reporting Period under review		✓	✓
Management report covering the reporting period	✓		✓
Effort table & cost claims – consolidated at the EDIH level, for the reporting period	✓		✓

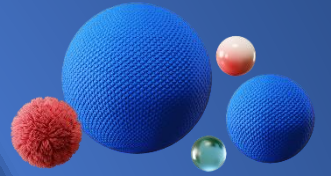European Commission

Reminder:

The **presentation** and its **recording** will be available on the

EDIH website

Quick refresher on how to **record KPIs**:

The presentation and info from the Webinar on KIPs area available on the **EDIH website**:

https://european-digital-innovation-hubs.ec.europa.eu/events/webinar-how-report-kpis

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EDIH online meeting
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Thank you

Directorate-General for Communications Networks, Content and Technology
DG CNECT A/4 - Digital Transformation and Industrial Ecosystems

EDIH | European Digital Innovation Hubs Network

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