

NEW

16-17 April 2018, Warsaw | 13-14 December 2018, Hamburg



LECTURERS

Franck Sottou
 Audrius Zobotka

LEARNING OBJECTIVES



- To use efficiently Financial Instruments and SCO in an integrated way (packages)
- To smoothly set-up of calls and selection of beneficiaries;
- To ensure a constant implementation of FIs;
- To ensure full application of SCO and in particular unit costs and lump sums;
- To anticipate the closure of interventions;
- To manage high-risk issues like State Aid and selection;
- To list the success conditions of monitoring, verification, effective and efficient day-to day management.

METHODOLOGY



Online preparation



Face-to-face training



Concrete examples



Action plan



Test & certificate of qualification

KEY ELEMENTS

- Learning lessons from the past including the application of SCO to ESF (flat rates) and combination of FI and global grants;
- Improving ex-ante assessment, investment strategy, decisional process;
- Finding the optimum in legal structures of FI and requirements for the funding agreements;
- Understanding calculation of unit costs and lump sums (collective and individual) in line with the "Omnibus" Regulation;
- Presenting off-the-shelf financial instruments vs. tailor made instruments;
- Ensuring the best combination of supports;
- Preventing irregularities and errors, through implementation to closure: focusing on management verification, eligibility rules, State aid, and selection.



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STEP 1: LOOKING AT THE FIRST APPLICATIONS: EXAMPLES OF SCO IN PRACTICE

- Flat rates: 25% for ESF / ERDF, 15% of staff costs, INTERREG flat rates
- Unit costs for ESF and ERDF
- Lump sums for small ESF projects
- JAP

STEP 2: LOOKING AT KEY COMPONENTS OF FINANCIAL ENGINEERING OPERATIONS

- Decisional process, selection of funds
- Legal structures of financial engineering instruments
- Types of supports (guarantees, loans, equities...)
- Errors and main risks

STEP 3: DEFINING SUCCESS CONDITIONS INCLUDING AUDIT

- Success conditions and key recommendations listed
- Lessons learnt: reduction of administrative burdens?
- Changes needed in the management and control system: the national background
- Audit view on SCO and FI: guest speaker

Lunch at 12.30-14.00 | 15-minute breaks at 10.30 and 15.15 both days

STEP 4: DISCUSSING SIMPLIFICATION & POSSIBILITY OF PACKAGES FOR BENEFICIARIES

- FI & Global Grant
- SCO & FI
- SCO & FI & ITI or CLLD

STEP 5: FINDING NEW WAYS OF APPLICATION OF SCOS & FI

- Exercises on the possibilities to apply by sector
- Social inclusion & trainings
- R&D and innovation, SME, Energy and Transport

STEP 6: SETTING UP A NEW MANAGEMENT AND CONTROL SYSTEM

- Management & control system as a managerial tool
- Prevention of specific risks: PP & State aid
- Better communication and improved prevention of risks
- Full action plan

FEEES

1150€

- All taxes & costs included
- VAT exemption a. 132 of Directive 2006/112/EC

Discounts

- 10% from 2 participants from the same organisation
- 15% registration 60 days before the event

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