



NEWS ON SIMPLIFICATIONS TRADITIONAL AND INTEGRATED PROJECTS

25/02/2020

SIMPLIFICATIONS: A CONSTANT GOAL

SOME REMINDERS

1. *Technical report only in electronic format – financial statements in paper and electronic*
2. *Simplified cost summary sheet*
3. *No more VAT certificates requested and increased of the audit threshold*
4. *Reduction of number of project visits to Integrated Projects (two the 1st year of implementation and 1 the following year)*

IN 2019 – MORE SIMPLIFICATIONS (TRADITIONAL PROJECTS ONLY)

1. *For LIFE14-17 traditional projects, the 18-months requirement applies to the period covered by successive reports (and not their dates of submission);*
2. *As of LIFE18, no 18 months requirement anymore but ad-hoc additional reporting if deemed necessary;*
3. *The format of the progress report was revised to shorten it and focus on the overall pictures;*
4. *Three weeks before the project visit, submission of due deliverables to external monitoring team (and officially with the following Mid-term or final report).*

IN 2020 – NEW SIMPLIFICATIONS ON AMENDMENT

1. *The submission of the amendment request is simplified. **Only the cover letter and the declaration/mandates (if required) must be originally signed.** The rest of supporting documents can be submitted in electronic scanned version=> Please look to the latest checklist on the website.*
2. *In case of a modification of the partnership (addition or withdrawal of associated beneficiary), no more necessary to submit all the agreement letters of the other associated beneficiaries. **The coordinating beneficiary should explicitly confirmed having requested and obtained their agreement.***

IN 2020 – AVOID MISSING ELEMENTS OR MISTAKES IN SUBMISSION OF PAYMENT AND AMENDMENT REQUEST – UP COMING NOVELTIES

1. *Many payment requests are suspended due to errors or mistakes that can be easily avoided such as inconsistent reporting period, missing signatures etc => reporting templates will be modified to add in the first page of the report a list of check to assess your own evaluation of the completeness of the payment request*
2. *Many amendments requests are delayed due to missing documentation => a list of checks to ensure the completeness will be soon available on the website to be annexed to the cover letter requesting the amendment.*



European
Commission



Search

European Commission > EASME > LIFE programme

LIFE programme

The LIFE programme is the EU's funding instrument for the environment and climate action created in 1992. The current funding period 2014-2020 has a budget of €3.4 billion.



Save the date!

LIFE Information and Networking Day

< #EULife20 >

30 April 2020 | Brussels



Interested in submitting a LIFE application? The EU LIFE information and networking day is on 30 April 2020.

3/4

LIFE Website

<https://ec.europa.eu/easme/en/life>

Funding opportunities

IP PHASE AMENDMENT

MERGING PHASES



❖ *Reminder: phase amendment guidelines (Dec '19)*

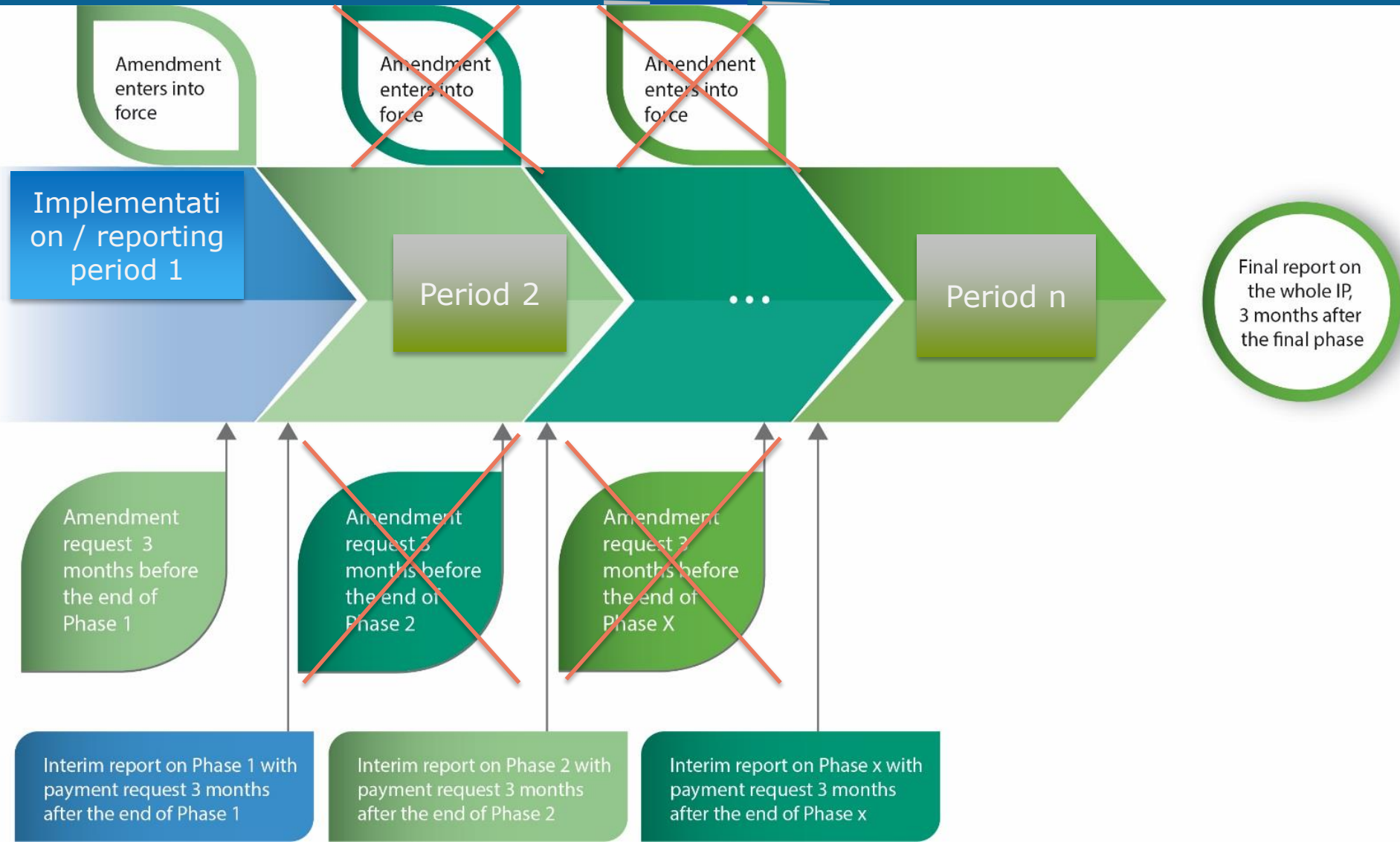
❖ **Applicable to business-as-usual (no merging)**

❖ *Now: guidance on phase merging*

❖ **Merging optional for LIFE14-16**

❖ Last phase amendment: budget consolidation compulsory

❖ **Compulsory for LIFE17 onwards**



LIFE14-16

- Encouraged but optional, BUT
- Must present single budget at the time of the last phase update

LIFE17-19

- Compulsory

LIFE20
onwards

- Single budget from application stage

Advantages



Why
merge?

No need for amendments
for a phase update*

**Except one, to merge the budget*

Simplified budget

Certain degree of flexibility
in the technical activities

Slightly simplified financial
reporting

What is a simplified budget?

One budget for the whole project duration , i.e. not divided into phases

Group cost types within cost categories

Combine actions (e.g. A1, A2, ... A5; C1, C2, ...C12)) in the corresponding set of actions (e.g. A; C) or a few subsets of them

E.g.

Personnel: per beneficiary,
one line per set of actions per category / role of staff (or two
lines in case of permanent and additional staff)

Travel: per beneficiary,
group travel within country, within Europe, outside Europe;
group further into purpose of travel e.g. “field trips and working
meetings”, “participation in workshops, conferences, events”

External assistance: per beneficiary,
the same cost type (e.g. production of plantlets) for actions C2,
C4 and C5 can be entered in one row referring to that cost type
for the set of C actions, or the same cost type (e.g. design of
communication materials) for actions E1, E5 and E6 can be
collected in one row (E)

Detailed instructions and tips for reworking the cost categories in the
“General guidelines for the presentation of an amendment to the grant agreement”

Direct Personnel costs

| Beneficiary short name | Set of actions | Type of staff | Category / Role in the project | Average daily rate | Number of person days | Direct personnel costs |
|------------------------|----------------|---------------|--|--------------------|-----------------------|------------------------|
| CB | A | Permanent | Senior experts [foresters (3), geologists (1), biologists (2)] | ... | ... | ... |
| CB | C | Permanent | Senior experts [foresters (5), geologists (1), biologists (3)] | ... | ... | ... |
| CB | A | Permanent | Junior experts (5) | ... | ... | ... |
| CB | C | Permanent | Technical assistants (8) | ... | ... | ... |
| CB | C | Additional | Technical assistants (24) | ... | ... | ... |
| CB | E | Permanent | Communication expert (1) | ... | ... | ... |
| CB | E | Additional | Communication expert (2) | ... | ... | ... |
| CB | F | Additional | Administrative assistant (2) | ... | ... | ... |
| CB | F | Permanent | Project manager (1) | ... | ... | ... |
| AB1 | D | Permanent | Senior experts (4) | ... | ... | ... |
| AB1 | D | Additional | Senior experts (2) | ... | ... | ... |
| AB2 | A | Permanent | Senior expert (1) | ... | ... | ... |
| AB2 | C | Additional | Senior expert (5) | ... | ... | ... |
| AB2 | C | Permanent | Junior experts (5) | ... | ... | ... |

Travel and subsistence costs

| Beneficiary short name | Set of actions | Destination | Purpose of travel (number of trips) | Travel costs | Subsistence costs | Total travel and subsistence costs |
|------------------------|----------------|----------------|---|--------------|-------------------|------------------------------------|
| CB | A | Within Country | Work meetings (16) | ... | ... | ... |
| CB | E | Within Country | Workshops (50) | ... | ... | ... |
| CB | F | Within Country | Scientific committee and coordination meetings (30) | ... | ... | ... |
| CB | E | Within Europe | Presentation at conferences (4) | ... | ... | ... |
| AB1 | E | Within Country | Workshops (50) | ... | ... | ... |
| AB2 | F | Within Country | Coordination meetings (20) | ... | ... | ... |
| AB2 | C | Within Country | Fieldwork visits (420) | ... | ... | ... |
| AB2 | D | Within Country | Fieldwork visits (40) | ... | ... | ... |
| AB3 | A | Within Country | Fieldwork visits (230) | ... | ... | ... |
| AB4 | E | Within Country | Stakeholder meetings (20) | ... | ... | ... |
| AB5 | E | Within Country | Stakeholder meetings and workshops (150) | ... | ... | ... |
| AB5 | F | Within Country | Working meetings (60) | ... | ... | ... |
| AB6 | F | Within Country | Working meetings (40) | ... | ... | ... |
| AB6 | E | Outside Europe | Participation in Congresses (2) | ... | ... | ... |

Breakdown of costs for Sets of Actions in Euro (excluding overhead costs)

| Set of Actions | Name of the Set of Actions | 1. Personnel | . | . | . | 8. Overheads | TOTAL |
|----------------|--|--------------|---|---|---|--------------|-------|
| A | Preparatory actions, elaboration of management plans and/or action plans | | | | | | |
| C | Concrete (conservation / implementation) actions | | | | | | |
| D | Monitoring of the impact of the project actions | | | | | | |
| E | Public awareness and dissemination of results | | | | | | |
| F | Project management and monitoring of project progress | | | | | | |
| | Overheads | | | | | | |
| | TOTAL | | | | | | |

MERGING PHASES



❖ *Summary:*

❖ **Outcome:**

- ❖ Budget with no phases & grouping, whole project duration
- ❖ But no need to have full planning detailed
- ❖ Detailed planning combined with interim reporting (annex)
- ❖ No default phase amendment
- ❖ Visit prior to end of phase → plans, changes... → amend?

❖ **Time to merge: request at any time until next IR**

❖ **How to prepare & submit request? → see guidance**



Thank you!

What shall be done with all the details in the initial budget that will be lost?

- The details shall be kept for internal project management which ought to follow an analytical, possibly calendarised budget each fiscal year
- A description of the **major cost items** shall be included (if not there already) in the **technical description** of the corresponding actions in the section **"Cost estimation"**; person days and amount + major costs (external assistance, durables)

When shall Interim reports be submitted?

- In accordance with the approved reporting schedule (form C2)

Is there a threshold for requesting payments?

- No, interim payments will be calculated on the basis of the eligible costs incurred

How does the simplified budget affect financial reporting?

- Reporting will be detailed in all categories except for travel
- Travel: **all costs for one trip may be grouped**, including if several persons travel to the same meeting; the entire cost can be declared in one line with some explanation and the names of staff who travelled

If I choose to simplify what is the deadline for the global amendment for merging the budget?

- **Three months before the end of the running phase** (i.e. when the request for a phase update would have been due)

If the IP is already in Phase 2 or 3 does the entire IP budget (from Phase 1) have to be merged or just that for the remaining phases?

- The entire IP budget, so it may not be worth simplifying for projects that are already in their third phase.

If the first interim payment proceeded shall the merged budget be corrected to incorporate the 'actual' costs for Phase 1?

- Not necessary unless the overall budget has been significantly affected. One should rather work with the latest approved budget (e.g. following the amendment at end of Phase 1)

Following the simplification amendment will we have no further amendments?

- There will be no further amendment requests for a phase update. Only traditional type amendments if needed.

How much technical flexibility is possible through this simplification?

- CB can fine-tune planning and technical implementation in the course of the project, seeking the advice of TMO and EASME if necessary. The CB will present updated planning and any technical / financial deviations in the interim reports for the next period of implementation