

# Project application assessment

## Central Baltic programme

Effective approaches to assessing project quality

Samu Numminen

Project Manager

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A blue starburst graphic with multiple points, containing the text "Application submission is preceded by consultations".

Application  
submission is  
preceded by  
consultations

# General

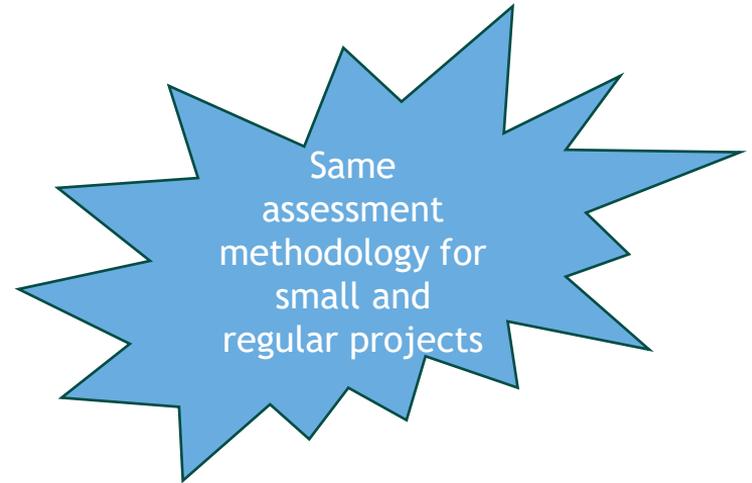
- CB uses Jems for assessments
  - Admissibility and assessment checklists, state aid checklist (GBER is applied)
- Two-step assessment procedure
  - Technical admissibility (eight criteria) is checked before the assessment → questions asked if needed
  - Step 1 includes strategic assessment (four criteria)
  - Step 2 includes strategic and operational assessment (seven criteria)
  - Only step 2 for small projects, but as a "lighter" version
- Assessments are done by the JS
  - Thematic expertise is in place internally

## Assessment criteria - strategic assessment

- I The project's contribution to programme results and strategic relevance - 45% / 30%
  - II The project's cross-border added value - 20% / 10%
  - III Partnership relevance and capacity - 20% / 10%
  - IV The project approach - 15% / 10%
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- Strategic assessment consists of 60% of the total in the 2<sup>nd</sup> step

# Assessment criteria - operational assessment

- V Work plan/Activity plan 15%
  - VI Management 10%
  - VII Budget 15%
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- Operational assessment consists of 40% of the total in the 2<sup>nd</sup> step



# Scoring

- Scoring from 1 to 4 points for each assessment category
  - Full numbers are used
- 4/very good - the project is exceptionally well in line with the requirements set by the programme
- 3/good - the project is in line with the requirements set by the programme
- 2/acceptable/weak - the project meets the minimum requirements of the programme
- 1/poor/unsatisfactory - the project is not in line with the requirements set by the programme
- If a score 1 is given in any criterion, assessment will be discontinued, and the project will be proposed to be rejected

# Practicalities

- MA divides assessment responsibilities among the staff
  - Currently ten people who can be assigned to assessments
  - Max. 120 days for the whole process from end of call to MC decisions
- Four eyes principle → consolidated assessment
- Questions asked only during admissibility checks, not during assessments (recommendations/conditions will be set by the MC)
- External referencing → INDEX
- Assessment reports with proposals to the MC
  - MC members have access to application forms as well

# What have we learned?

- No big arguments between assessors - the methodology works
- Monitoring Committee decisions follow assessment results generally very well - the system works
- The MC focus is on the strategic side
- Changed from 2014 - 2020
  - Communication not assessed separately anymore
  - A clear threshold (score 2,5) for proposing a project to be funded
  - Scoring system from 1 - 4, was from 1 - 5
- Starting to lean towards a one-step approach overall