

## STUDY ON IDENTIFYING THE CONSULTANCY NEEDS OF THE MEMBERS OF THE TERRITORIAL PACT AND THE COUNTY PARTNERSHIPS IN THE CENTRE REGION

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**ABSTRACT:** *In order to ensure some quality consulting services within the activity “Providing consultancy services to develop applications for European funding with focus on the SOP HRD 2007-2013”, in order to identify the organisations’ consultancy needs, the problems they face in elaborating the financing applications and implementing projects, there has been elaborated, within the PTS, the document “Questionnaire on identifying the consultancy needs of the members of the Territorial Pact and the County Partnerships - Centre”. The questionnaire was sent via e-mail to the member organisations of the Pact and the County Partnerships and also, it has been posted on the web site [www.stpcentru.ro](http://www.stpcentru.ro), so that all members may have access to it. The questionnaires collected until May, 25<sup>th</sup>, 2010 from 27 organisations were centralised in an excel format Data base.*

**KEY WORDS:** *PTS Centre, Territorial Pact Centre, consultancy, project, implementation, European funds, programmes, financing.*

**JEL CLASSIFICATION:** *M53, M10*

### 1. PRESENTATION OF THE FIELD AND THEME

The basis for the project “The Establishment of the Permanent Technical Secretariat of the Regional Pact for Employment and Social Inclusion in the Centre Region” has been “The Implementation Framework Document of the SOP HDR”. This project meets the specific objective of the Priority Axis 3 “Improving adaptability of workers and enterprises”. The proposed activities to be carried out under the

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Permanent Technical Secretariat aim to strengthen the administrative capacity of social partners' development of new partnerships for employment and social inclusion and promote the existing ones.

The key Area of Intervention 3.3 "Developing partnerships and encouraging initiatives for social partners and the civil society" supports the development, monitoring, evaluation and review of the Regional Action Plan for Employment and ensures its implementation.

The establishment of the Permanent Technical Secretariat enables to bring at the same table of discussions the state institutions, the private organisations and the civil ones, actively involved in the fields of employment and social inclusion.

Research studies at the regional level, awareness campaigns, the support in the implementation and permanent updating of PRAO, providing support for the development of action plans on encouraging and developing partnerships, developing consultancy services, fundraising, seminars, conferences, work-shops, trainings, improving relationships and communication within the pact and with its outside world etc., are value-added activities.

## **2. BRIEF HISTORY**

The creation of Territorial Pacts was an initiative of the Ministry of Labour, Family and Equal Opportunities, which was launched when developing The Regional Action Plans for Employment and Social Inclusion (PRAO) through the Phare Technical Assistance Project RO 2003/005-551.05.01.04.04.01 "Support of the Ministry of Labour in developing and implementing the employment and training policy for EDIS" (Extended Decentralised Implementation System).

As a result of the technical assistance projects to the Government of Romania, on September 25, 2006, 74 institutions and organizations of the Development Region Centre, among which the Romanian-German University of Sibiu, signed the charter, establishing the Territorial Employment Pact Labour and Social Inclusion in the Central Region (PROIS-C). In Romania, 8 such Territorial Pacts were established. **The Pact Charter** promotes regional employment initiatives to maintain and promote sustainable employment growth, reduce unemployment, fight against exclusion.

The Territorial Pact Centre is a partnership agreement between relevant actors at the regional level for sector employment and social inclusion.

County Partnerships are made up of representative organizations at the county and local level (local authorities, disconcerting services, NGOs, trade unions, employers, clergy, etc.), which are involved in implementing the European development policies and have been established, at the local level, with the stated aim of supporting the pact.

During 2007-2008, either at their own initiative, or having the significant support of the experts in the technical assistance team, various meetings of the Territorial Pact Centre were held. There could have been noticed a permanent interest of organizations for the human resource development issue, but also for the difficulties of correlation and coordination of their efforts.

In September 2009, the Territorial Pact Centre acquires a new dimension with the establishment of the Permanent Technical Secretariat Centre (PTS), a support and advisory body of the PROIS-C members and activities, capable of improving the coordination of actions and projects of the social actors, members of the Pact. The Permanent Technical Secretariat is a strategic project within the Sectoral Operational Programme for Human Resources Development (SOP-HRD), co-financed by the Romanian Government and The European Union.

The project's goal is *to establish the Permanent Technical Secretariat of the Central Region Pact* and to ensure its functionality, in order to support the Centre Region Pact members, in their efforts to increase investments in human capital of the Central Region and to provide the labour force with a high skill level, competitive, dynamic and flexible, making use of the Regional Pact, implementing the Regional Action Plan for Employment and Social Inclusion and facilitating access to the European Social Fund through the Sectoral Operational Programme Human Resources Development.

The target group consists of:

- a) **Direct beneficiaries** (members of the Regional Pact Centre and of the County Partnerships: Alba, Braşov, Covasna, Harghita, Mureş and Sibiu).
- b) **Indirect beneficiaries:** (all institutions and organisations involved in the fields of social employment and inclusion and all the population of the Region Centre).

PTS Centre develops activities through which it supports the establishment and development of partnerships, as well as the development of social partners' administrative capacity, it offers support to the promotion of regional employment policies, it takes part into the process of consulting all factors in fighting unemployment and social inclusion.

With the consultancy that PTS offers to the Regional Pact members, for the implementation of eligible financing within the programmes financed from European funds, as well with the assistance offered throughout the implementation of projects, especially within SOP-HRD 2007-2013, the project complies with "*National Reference Strategic Framework (NRSF) 2007-2013*", which has as priority "to use Structural Instruments to reduce economic and social disparities in Romania and the European Union's member states"

Through the information and communication, professional training and consultancy activities of the PTS, direct and indirect beneficiaries complete and widen their informational resources necessary to the consolidation of their ability to implement the Regional Action Plan for Employment.

PTS aims to establish a general agreement between beneficiaries, in order to develop and implement the employment strategies and policies to maximize new integration opportunities on the labour market.

### **3. THE OBJECTIVES AND RESULTS OF THE RESEARCH**

**Objective no. 1: Knowing the type of activity in which organisations are interested to benefit from consultancy offered by the PTS Office**

In order to achieve this objective, question no.1 was introduced in the questionnaire. The collected information is presented in table 1.

**Table 1. Knowing the type of activity in which organisations request consultancy**

		Frequency	Percentage	Valid percentage
Total		27		
Missing system		1		
Valid		26		
	Developing applications for European funding	21	80,8	50,0
	Implementing European funding projects	21	80,8	50,0
<b>Total</b>		42	161,6	100,0

Note: \* The total of responses is greater than 27, namely 100%, because the question had multiple answers.

By processing the obtained information, we can state that all responding organisations are interested in the PTS Centre Office to give them consultancy both in elaborating the financing applications from European funds (an option which was stated in a 80,8% percentage of respondents), and in implementing the European funding projects (an option stated in a 80,8% percentage of the organisations). For one respondent (The Chamber of Commerce, Industry and Agriculture Alba), the PTS Centre's consultancy activity has no interest.

As expected, we notice the organisations' high interest in benefitting from consultancy services in implementing projects, given the fact that, unfortunately, there are a lot of uncertainties due to ambiguous provisions, the lack of experience in implementation, the refusal of authorised persons to take responsibility for formulating official responses to the requests made to them etc.

**Objective no. 2: Knowing the extent to which organisations are interested to receive advice in elaborating financing applications for other projects and the options on these programmes**

Financing programmes are diverse. Organisation members of the Territorial Pact Centre and County Partnerships are mostly public institutions, which is why accessing funds often depends on the community's most important necessities (such as the infrastructure). Another factor which seems to be considered is that of the "easiness" to make the application and implement the project. Regardless of the influencing factors in applying for financing, the PTS Centre team has to be ready to respond to the requests, the consultancy's focus, however, being on the SOP HRD 2007-2013. Starting from these premises, through this research we have tried to discover the extent to which organisations are interested to receive consultancy in developing financing applications for other projects and to discover the options

concerning these programmes. In order to reach this objective, questions 2 and 3 were formulated. The information collected is presented in tables 2 and 3.

**Table 2. The level of interest in receiving consultancy for elaborating applications for other projects**

		Frequency	Percentage	Valid percentage
Valid	27			
	Yes	22	81,4	81,4
	No	5	18,6	18,6
<b>Total</b>		27	100,0	100,0

**Table 3. Options regarding the interest programmes for consultancy**

		Frequency	Percentage	Valid percentage
Total	27			
Missing system	5			
Valid	22			
	ROP	10	45,5	10,4
	SOP IEC	8	36,4	8,3
	SOP HRD	19	86,4	19,8
	SOP Environment	6	27,3	6,3
	PSOP Transport	2	9,1	2,1
	ACD POS	10	45,5	10,4
	NRDP	3	13,6	3,1
	OP Fishing	2	9,6	2,1
	<b>Total structural funds*</b>	<b>62</b>	<b>281,8</b>	<b>62,5</b>
	Socrates	3	13,6	3,1
	Leonardo da Vinci	5	22,7	5,2
	<b>Total Life Long Learning*</b>	<b>8</b>	<b>36,3</b>	<b>8,3</b>
	A. Urban Green Spaces	4	18,2	4,2
	B. Natural Protected Areas	4	18,2	4,2
	C. Europe for citizens	8	36,4	8,3
	D. Financial instrument for civil protection	2	9,1	2,1
	E. Technical assistance instrument for energetic efficiency	4	18,2	4,2
	F. EuropeAid Programme	2	9,1	2,1
	G. Erasmus for Young Entrepreneurs	4	18,2	4,2
	<b>Total other financings*</b>	<b>26</b>	<b>118,2</b>	<b>29,2</b>
	<b>GENERAL TOTAL*</b>	<b>96</b>	<b>436,3</b>	<b>100,0</b>

Note: \* The total of responses is greater than 22, respectively than 100%, because the question has had multiple answers.

The obtained information reveals the fact that most of the organisations (81,4%) are interested in receiving advice to elaborate financing applications for other

projects, while 18,6% of them do not show any interest. This latter percentage should not be considered a warning for the lack of interest because, by analysing the information in the data base accomplished when the questionnaires were collected (through the correlation of questions 2 with 1), it is revealed that organisations which are not interested in receiving advice for preparing the financing applications for other projects have opted for consultancy in implementation. Therefore, these organisations are already implementing projects and currently do not have the necessary resources (financial, human, logistical) to access new European funds.

By processing the data presented in table 3, we conclude:

- with regard to the **structural funds**, most of the organisations (86,4%, respectively 22 organisations) state that they are interested in receiving advice to access SOP HRD funds. At a considerable distance (45,5%) we have the organisations which are interested in receiving advice for preparing the financing applications for the SOP and SOP HRD programmes and 27,3% are interested in consultancy for the SOP Environment programme. The SOP Transport, NRDP, OP Fishing programmes have also been mentioned, the percentage of the organisations member of the Territorial Pact and the County Partnerships interested in the consultancy activity developed by the PTS Centre being smaller;
- regarding „**Life Long Learning**”, Leonardo (22,7% of organisations) and Socrates (13,6%) programmes were mentioned.
- for „**Other financing**”, the biggest percentage is held by the programme “Europe for citizens”, mentioned by 36,4% of the respondents. Respondents were also interested in receiving consultancy within other financings also for the programmes “Technical assistance instrument for energetic efficiency”, „Erasmus for Young Entrepreneurs” etc.

### **Objective no. 3: Knowing the opinion on the difficult sections in filling in the financing application form**

It is not enough to just have a good idea for a project. We should fill in correctly the financing application form, in accordance with the specific provisions of each guideline. In order to know which sections show difficulties in filling in the financing application form, question no.4 was introduced into the questionnaire, the gathered information being presented in table 4.

It can be noticed that the difficulties that member organisations of the Pact and County Partnerships Centre have in filling in the financing application forms are distributed as follows: for the majority of the organisations (65,2%) one of the difficulties lies in the integration of horizontal objectives, followed, at a relatively small distance, by defining the indicators of accomplishment of project (52,2% of the organisations) and the project’s implementation methodology (43,5%).

An approximately equal percentage in the respondents’ opinion is represented by three other difficulties, namely: establishing the general objective and of the specific objectives (for 30,4% of the organisations), describing the context and project’s justification (difficulty stated by 34,8% of the organisations), defining and planning the project’s activity (for 30,4% of the organisations). With regard to the

formulation of the project’s results, it can be noticed that the percentage of this difficulty is not that big, being stated by 8,7% of the organisations.

**Table 4. Difficulties in filling in the financing application form**

		Frequency	Percentage	Valid percentage
Total	27			
Missing system	4			
Valid	23			
	A. Allocating the project idea on a programme/axis/major field of intervention	5	21,7	7,6
	B. Establishing the general objective and the specific objectives	7	30,4	10,6
	C. Describing the context and project justification	8	34,8	12,1
	D. Defining and planning the project’s activities	7	30,4	10,6
	E. Formulating the project’s results	2	8,7	3,0
	F. Defining indicators of achievement of project	12	52,2	18,2
	G. Project implementation methodology	10	43,5	15,2
	H. Horizontal objectives implementation	15	65,2	22,7
	<b>Total*</b>	<b>66</b>	<b>286,9</b>	<b>100,0</b>

*Note: \* The total of responses is greater than 23, respectively than 100%, because the question has had multiple answers.*

In our opinion, having on top of the positions the difficulty “integrating the horizontal objectives” is somehow a surprise for us and will be a priority in the consultancy activity of the PTS.

**Objective no. 4: Knowing the opinion on the projects’ implementation stages where organisations need consultancy**

If elaborating an application form may sometimes seem easy, things are different when talking about implementation.

Planning, activity monitoring, reports, financial management are only few of the aspects that should be carefully considered. From this perspective, the PTS Centre’s consultancy activity should also aim the projects’ implementation, the respondents actually stating that they are interested in and need it.

But, in order for the consultancy activity to be operational, another objective of the research consisted of knowing the opinion on the projects’ implementation stages

within the organisations that need support. The obtained information is presented in table 5.

**Table 5. Implementation difficulties and consultancy needs**

		Frequency	Percentage	Valid percentage
Total	27			
Missing system	4			
Valid	23			
	A. Public acquisitions	13	56,5	16,3
	B. Information and project publicity	4	17,4	5,0
	C. Pre-financing	9	39,1	11,3
	D. Types of eligible expenses and covering vouchers	14	60,9	17,5
	E. Reimbursements	17	73,9	21,1
	F. Technical-financial reports	10	43,5	12,5
	G. Changes to the financing contract	13	56,5	16,3
	H. Other aspects	0	0	0
	<b>Total*</b>	<b>80</b>	<b>347,8</b>	<b>100,0</b>

Note: \* The total of responses is greater than 23, respectively than 100%, because the question has had multiple answers.

It can be noticed that the majority of organisations (73.9%) say they need consultancy within the reimbursement stage. Moreover, 60,9% of the organisations claim they one of the problems for which they need advice is that of eligible expenses and covering vouchers, followed, at a relatively small distance, by the aspect regarding the changes to the financing contract and the public acquisitions (both having a percentage of 56.5% among the organisations).

Another problem that requires consultancy is that of the technical-financial reports (for 43.5% of the organisations) and the respondents seem to best cope with the information and project's publicity chapter where only 17.4% claim they would require consultancy.

As a general conclusion, we believe that the hierarchy of these difficulties was somewhat predictable, reimbursement being an issue that applicants are currently facing. We mention that knowing both the aspects related to the development of the financing application forms, and the problems occurring in the projects' implementation is beneficial for the consultancy activity of PTS Centre, the members of the team mainly focusing on the organisations' requirements.

#### **Objective no. 5: Knowing the SOP HRD AP and DMI for which consultancy in implementation is required**

A final objective of the research is to know the priority axes and the major intervention fields of the SOP HRD for which organisations require consultancy in the



projects' implementation. To achieve this objective, question no. 5 was formulated within the questionnaire, and those results are shown in table 6.

**Table 6. AP SOP HRD AP and DMI for which consultancy in implementation is required**

		Frequency	Percentage	Valid percentage
Total	27			
Missing system	14			
Valid	13			
	Axis 1, DMI 1.3.	1	7,7	4,2
	<b>Total Axis 1</b>	<b>1</b>	<b>7,7</b>	<b>4,2</b>
	Axis 2, DMI 2.3.	2	15,4	8,3
	<b>Total Axis 2</b>	<b>2</b>	<b>15,4</b>	<b>8,3</b>
	Axis 3, DMI 3.1.	4	30,8	16,7
	Axis 3, DMI 3.2.	2	15,4	8,3
	Axis 3, DMI 3.3.	2	15,4	8,3
	<b>Total Axis 3</b>	<b>8</b>	<b>61,5</b>	<b>33,3</b>
	Axis 5, DMI 5.1.	4	30,8	16,7
	Axis 5, DMI 5.2.	2	15,4	8,3
	<b>Total axis 5</b>	<b>6</b>	<b>46,2</b>	<b>25,0</b>
	Axis 6, DMI 6.1.	2	15,4	8,3
	Axis 6, DMI 6.2.	3	23,1	12,6
	Axis 6, DMI 6.3.	2	15,4	8,3
	<b>Total axis 6</b>	<b>7</b>	<b>53,8</b>	<b>29,2</b>
	<b>GENERAL TOTAL *</b>	<b>24</b>	<b>184,8</b>	<b>100,0</b>

Note: \* The total of responses is greater than 13, namely than 100%, because the question has had multiple answers.

After processing the collected information, we may conclude:

- **Priority Axis 3** holds the highest percentage among organisations seeking for consultancy (61,5%), the major fields of intervention upon which there are being implemented projects that require consultancy being the following: DMI 3.1 (30,8%), DMI 3.2 (15,4%), DMI 3.3 (15,4%);
- The second position as percentage of the organisations that require consultancy in implementation is held by **Priority Axis 6** (with a percentage of 53,8% of the organisations) within which consultancy is required by 15,4% of the organisations for DMI 6.1 and DMI 6.3 and 23,1% of the organisations for DMI 6.2. At a relatively small distance there is the **Priority Axis 5** mentioned by 46,2% of the organisations with major fields 5.1 (for 30,8% of the organisations) and 5.2 for 15,4% of the organisations.
- A smaller percentage in asking for PTS Centre support for the implementation can be noticed for AP 2, DMI 2.3 for 15,4% of the organisations that have answered the questionnaire and AP 1, DMI 1.3 for a percentage of 7,7 of the respondent organisations.

As a general conclusion, we may state that most often, the consultancy activity for the project financed by SOP HRD can be based on the Priority Axes 3, 6 and 5.

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