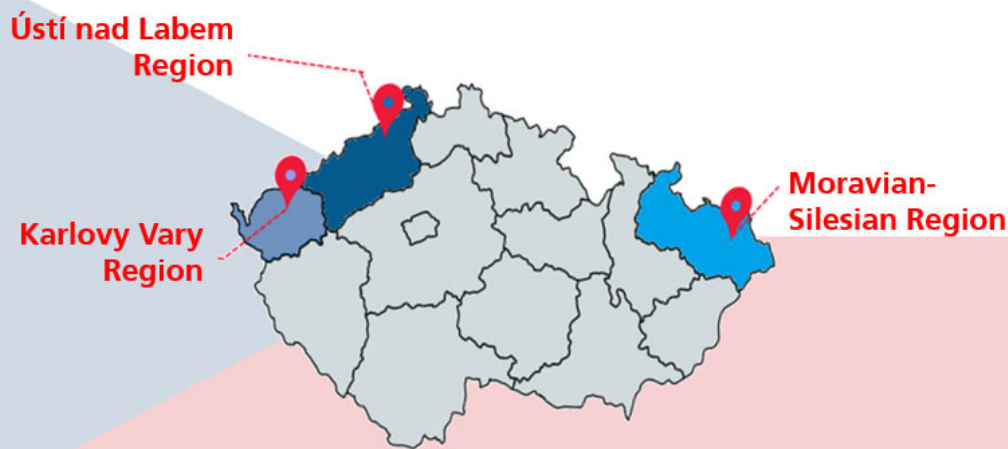


Framework Contract Procedure: REFORM/2021/OP/0006 Lot 1

SPECIFIC CONTRACT: REFORM/SC2022/116

# Support to the Implementation of the Just Transition in the Czech Republic



## D1. INCEPTION REPORT (FINAL) for Publication

03.03.2023



**Disclaimer**

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This Project is implemented by Frankfurt School of Finance & Management (as part of the AARC Consortium) in cooperation with Prague University of Economics and Business, Czech Technical University and BeePartner

## ABBREVIATIONS

|       |  |
|-------|--|
| AMSP  | Association of Small and Medium-Sized Enterprises and Crafts                 |
| AOP   | Application of ozone   |
| BP    | BeePartner a. s.   |
| CR    | Czech Republic, Czechia  |
| CTU   | Czech Technical University   |
| CZ    | Czech Republic, Czechia  |
| CZK   | Czech Crown  |
| D     | Deliverable  |
| DG    | Directorate General  |
| ESG   | Environmental, Social and Governance   |
| ESIF  | European Structural and Investment Funds                                     |
| EU    | European Union   |
| EUR   | Euro   |
| FS    | Frankfurt School   |
| GDP   | Gross domestic product   |
| GDPR  | General Data Protection Regulation   |
| GHG   | Greenhouse Gas   |
| ITI   | Integrated Territorial Investments   |
| JE    | Junior Expert  |
| JTF   | Just Transition Fund   |
| JTM   | Just Transition Mechanism  |
| JTP   | Just Transition Plan   |
| JTS   | Just Transition Scheme   |
| KoM   | Kick-off Meeting   |
| KVR   | Karlovy Vary Region  |
| LAG   | Local Action Group   |
| MA    | Managing Authority   |
| MEC   | Moravian-Silesian Energy Centre  |
| MoE   | Ministry of Environment  |
| MoRD  | Ministry of Regional Development   |
| MSIC  | Moravian-Silesian Innovation Centre  |
| MSID  | Moravian-Silesian Investment and Development                                 |
| MSR   | Moravian-Silesian Region   |
| NDB   | National Development Bank  |
| NGO   | Non-Governmental Organisation  |
| NUTS  | Nomenclature des Unités Territoriales Statistiques                           |
| P     | Programme  |
| PJT   | Programme Just Transition  |
| PM    | Project Management   |
| PwC   | PricewaterhouseCoopers   |
| Q     | Quarter  |
| RES   | Renewable energy sources   |
| RfS   | Request for Service  |
| ROP   | Regional Operational Programme   |
| RRF   | Resilience Recovery Fund   |
| RSC   | Regional Standing Conference (also known as “Regional Permanent Conference“) |
| SC    | Steering Committee   |
| SE    | Senior Expert  |
| SME   | Small and Medium Enterprises   |
| SMSČR | Association of Local Authorities of the Czech Republic                       |

|       |   |
|-------|---|
| SPOV  | Society for Rural Renewal                                   |
| START | Secretariat's Technical Assistance to Regions in Transition |
| T     | Training  |
| TA    | Technical Assistance  |
| TJTP  | Territorial Just Transition Plan                            |
| ToR   | Terms of Reference  |
| TSI   | Technical Support Instrument                                |
| UR    | Ústí Region   |
| UTM   | Union of Towns and Municipalities                           |
| WS    | Workshop  |

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# 1. PROJECT CONTEXT

## 1.1 Project Overview

|                                  |  |
|----------------------------------|--|
| <b>Specific Contract no.</b>     | <b>REFORM/SC2022/116 (hereinafter called as “the Project”)</b>   |
| <b>Overall objective</b>         | Support the Implementation of the just transition in the Czech Republic for the Ústí nad Labem, the Karlovy Vary and the Moravian-Silesian regions   |
| <b>Specific objective</b>        | <ul style="list-style-type: none"> <li>• Support national authorities to improve their capacity to design, develop and implement reforms in line with Article 4 of the Technical Support Instrument (TSI) Regulation</li> <li>• Support national authorities to improve their capacity to prepare, amend, implement and revise recovery and resilience plans pursuant to Regulation (EU) 2021/241</li> </ul>   |
| <b>Requested services</b>        | <p><b>Deliverable 1: Inception Report</b></p> <ul style="list-style-type: none"> <li>• Organise a kick-off meeting between the key stakeholders (DG REFORM, Ministry of Regional Development (MoRD), Ministry of Environment (MoE), the contractor)</li> <li>• Prepare an Inception Report (the present document)</li> </ul> <p><b>Deliverable 2: Report on lessons learned and recommendations for the implementation of the Just Transition Fund (JTF)</b></p> <ul style="list-style-type: none"> <li>• Review existing reports and data, and carry out a brief desk analysis</li> <li>• Conduct stakeholder interviews and surveys</li> <li>• Prepare Draft Report and present it to the Steering Committee</li> <li>• Revise Draft Report based on comments from the Steering Committee</li> <li>• Implement workshops for stakeholders</li> <li>• Finalisation of the report and Inception Report</li> </ul> <p><b>Deliverable 3: Documentation for application to the JTF under the “groups of projects” schemes for small projects</b></p> <ul style="list-style-type: none"> <li>• Prepare draft materials and submit to the Steering Committee</li> <li>• Revise draft materials based on comments from the Steering Committee</li> <li>• Organise stakeholder meeting to present the materials</li> <li>• Revise the materials based on feedback from the stakeholders</li> </ul> <p><b>Deliverable 4: Trainings to support the implementation of the JTF for Karlovy Vary and Ústí regions</b></p> <ul style="list-style-type: none"> <li>• Analyse the needs and design of the curriculum for direct trainings</li> <li>• Design the “train the trainer” sessions</li> <li>• Deliver the trainings (including those directed at small project developers and train the trainer sessions)</li> <li>• Report on trainings, including recommendations/suggestions for future training events</li> </ul> <p><b>Deliverable 5: Dissemination of good practices in priority areas for the implementation of the Territorial Just Transition Plans (TJTps)</b></p> <ul style="list-style-type: none"> <li>• Organise and hold three online workshops (one for each region) to transfer good practices</li> <li>• Prepare a handbook for dissemination</li> <li>• Organise and hold three workshops (one for each region) to promote the handbook</li> <li>• Report on workshops</li> </ul> <p><b>Deliverable 6: Recommendations for the transfer of good practices on regional development and innovation from Moravia-Silesia to the Karlovy Vary and Ústí regions</b></p> <ul style="list-style-type: none"> <li>• Conduct desk research and interviews of relevant stakeholders from the three regions</li> <li>• Prepare Draft Report and present it to the Steering Committee</li> <li>• Revise draft report based on comments from the Steering Committee</li> <li>• Organise and hold workshop(s) to present the reports and obtain feedback from stakeholders</li> <li>• Present the Final Report to the Steering Committee, including all comments</li> </ul> <p><b>Deliverable 7: Final Report</b></p> <ul style="list-style-type: none"> <li>• Prepare the Final Report, including annexes of all documents produced for Deliverables 1–6 documenting Project activities, monitoring indicators and lessons learnt</li> <li>• Prepare and hold a final workshop</li> </ul> |
| <b>Project starting date</b>     | 22.11.2022   |
| <b>Project duration</b>          | 20 months  |
| <b>Implemented by contractor</b> | Frankfurt School of Finance & Management (as part of the AARC Consortium) in cooperation with Prague University of Economics and Business, Czech Technical University and BeePartner   |

## 1.2 Purpose of the Report

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This Inception Report includes an update on the Project context, key findings for the approach and methodology for each deliverable, and further recommendations.

## 1.3 Project Context Update

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### 1.3.1 EU and country level

In December 2019, the European Commission (Commission) committed to ensuring sustainable development in Europe through the *European Green Deal*, which specifically set the ambitious goal of prioritising Europe's transition to a sustainable economy and become the first climate-neutral bloc in the world by 2050.<sup>1</sup> This objective requires significant investment efforts across all sectors. To ensure a just and fair transition to a climate neutral economy, the Just Transition Fund (JTF), with a total allocation of EUR 17.5 billion, specifically targets regions that will be most affected by the transition (i.e., given their dependence on fossil fuels or greenhouse gas (GHG)-intensive industrial processes) during 2021-2027.

**However, the implementation of the JTF will likely be affected by important events that have considerably changed the geopolitical and economic context** in the wake of the global pandemic and Russia's invasion of Ukraine. The impact of the Russian invasion has already been observed in higher prices for energy, food and raw materials, monetary indicators and weaker growth prospects, in addition to the humanitarian crisis. The transition to a climate neutral economy will be influenced by higher energy prices that heavily impact the most vulnerable households who experience or are at risk of energy poverty as well as the enterprise sectors most sensitive to energy prices. Moreover, Europe is also witnessing an unprecedented inflow of people from Ukraine that adds pressure on public budgets and labour markets. After Poland and Germany, the Czech Republic has absorbed most of the Ukrainian refugees in the EU. According to the organisation People in Need, the largest number of Ukrainian refugees per capita are located in Central and Eastern European countries (i.e., by number of visas issued). In this sense, the Czech Republic hosts the highest relative number of refugees (43 refugees per 1,000 inhabitants). Poland and Estonia also host a comparable number of refugees in relation to their population.<sup>2</sup> The impact of these factors will need to be reflected and analysed when implementing the Project in the Czech Republic.

**To reach its climate targets, the Czech Republic needs to reduce mining, close or replace coal-based power plants, and modernise or close carbon-intensive industries.** According to a BeePartner study (2022, p. 32),<sup>3</sup> it follows that hard coal mining in the Moravian-Silesian region is to be terminated in 2025 (closure of the last active ČSM mine)<sup>4</sup>. The termination year of lignite mining in the Ústí nad Labem and Karlovy Vary Regions may, in the extreme case, be postponed until 2033. However, even if coal mining in the Czech Republic were to cease by 2033, there would likely be continued imports of hard coal and lignite from abroad after 2033. **In view of the unpredictable geopolitical developments in Ukraine, the planned timing scenario for the withdrawal from coal production and imports set for the period 2025-2033 may not be respected.** Due to the time required to replace Russian natural gas with natural gas from other countries, and hence other energy sources, the phase-out of coal, which will be needed to replace the missing natural gas from Russia, may be postponed. **These aspects are important in the coming months (and likely years) to determine and decide on the potential phase-out of coal for energy purposes (in the case of coal mining and imports).**

The transition process to climate neutrality is expected to particularly affect communities with carbon-intensive industries and low-productivity, as well as communities with a high risk of increasing unemployment, poverty and those with high regional disparities, such as those in the Ústí nad Labem (hereafter "Ústí"), Karlovy Vary and Moravian-Silesian regions. These coal regions are the eligible

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<sup>1</sup> European Commission (2020). Sustainable Europe Investment Plan - European Green Deal Investment Plan.

<sup>2</sup> See: [https://www.peopleinneed.net/the-ukrainian-refugee-crisis-providing-important-historical-context-for-the-current-situation-9539gp?\\_ga=2.86644056.1757767848.1675434184-1302310185.1674863301](https://www.peopleinneed.net/the-ukrainian-refugee-crisis-providing-important-historical-context-for-the-current-situation-9539gp?_ga=2.86644056.1757767848.1675434184-1302310185.1674863301)

<sup>3</sup> Source: Beepartner (2022). Analýza dopadů budoucího odklonu od využití uhlí ve spalovacích zdrojích (*Analysis of the impacts of a future shift away from coal use in combustion sources*). Available at: [https://dotaceeu.cz/getmedia/b1b9be2e-7d2a-4377-ae35-ab97e541f3a5/Analýza-dopadu-budoucího-odklonu-od-využití-uhlí-\(MSK,KVK,UK\)\\_FINAL.pdf.aspx](https://dotaceeu.cz/getmedia/b1b9be2e-7d2a-4377-ae35-ab97e541f3a5/Analýza-dopadu-budoucího-odklonu-od-využití-uhlí-(MSK,KVK,UK)_FINAL.pdf.aspx) Available at: [https://dotaceeu.cz/getmedia/b1b9be2e-7d2a-4377-ae35-ab97e541f3a5/Analýza-dopadu-budoucího-odklonu-od-využití-uhlí-\(MSK,KVK,UK\)\\_FINAL.pdf.aspx](https://dotaceeu.cz/getmedia/b1b9be2e-7d2a-4377-ae35-ab97e541f3a5/Analýza-dopadu-budoucího-odklonu-od-využití-uhlí-(MSK,KVK,UK)_FINAL.pdf.aspx)

<sup>4</sup> See also: <https://konecuhli.cz/uncategorized/tezba-uhlí-na-dole-csm-do-roku-2025/>



territories in the Czech Republic that will benefit from the measures of the EU's JTF. This is in line with the JTF's emphasis on the economic diversification and the reskilling and active inclusion of workers and jobseekers of these regions most affected by the climate transition. **However, the government (appointed by the President of the Czech Republic from December 2021) has not yet agreed on a formal date for the coal phase out.**

From the funding perspective, a **considerable amount of the JTF results from resources of the European Recovery and Resilience Facility (RRF) and thus needs to be allocated until December 2023.** In the case of the Czech Republic, more than 50% of the EUR 1.64 billion allocated to the JTF falls under the RRF (EUR 853 million) and requires commitments and coverage by grant agreements within the next 12 months (by December 2023). This **puts a lot of pressure on the regional and local authorities to create and implement a project pipeline that will become eligible under the JTF.**

The Commission approved the Partnership Agreement of Czech Republic on 13 May 2022. The Czech Republic submitted eight programmes between December 2021 and March 2022. **The European Commission approved the "Just Transition" programme by its implementing decision "C(2022) 6906 final" on 26 September 2022.** This programme is supported by the JTF under the Investment for Jobs and Growth objective for the Karlovy Vary, Ústí and Moravia-Silesia regions in the Czech Republic (CCI 2021CZ16JTPR001). These three regions will be heavily impacted by the climate transition with an expected loss of 18,000 jobs in mining and 3,600 jobs in the energy sector as well as an indirect impact of 20,000 jobs in the metallurgy, steel, chemical and manufacturing industries.<sup>5</sup>

To boost access for EU Member States to the JTF, the Commission, represented by DG REFORM through the Structural Reform Support Programme has already provided technical support for the preparation of a Territorial Just Transition Plan (TJTP) to the Czech Republic for the three coal regions (Ústí, Karlovy Vary and Moravia-Silesia). The project was implemented by Frankfurt School of Finance & Management (as part of the AARC Consortium). The technical support project started on 5 October 2020 and lasted nine months.

**The previous technical support project identified several challenges** related to (1) low maturity of project pipeline; (2) administrative costs related to project preparation and implementation; (3) lack of data/unreliable data (e.g., no definitive plans for the restructuring of coal-fired power plants); (4) lack of clarity on eligibility of certain areas of investment; (5) missing participation/motivation of regional and local authorities as well as other regional stakeholders including small and medium-sized enterprises (SMEs), academia and NGOs to become active and experienced owners of project (despite of MoRD and open possibility to become a guest or member of Transformation Platform); (6) risk that projects for small actors are considered less important than strategic projects for the regions; and, (7) lack of policy planning and monitoring capacity at the level of regional authorities.

All of these factors could hamper the absorption capacity of public funds and the smooth development of a pipeline of quality projects for the JTF, particularly for small actors (e.g., SMEs, municipalities and NGOs) in the areas of project development as mentioned before and identified during the previous TA.

**The above-mentioned context and challenges were highlighted by recommendations in a previous technical support project. These included recommendations relating to the development of 10-15 schemes for "groups of projects" from the three regions** to facilitate the financing of small-scale projects by the JTF. Each scheme will focus on a specific topic and type of project. Most importantly, the projects focus on: a) supporting SMEs through different subtopics; b) create vouchers for SMEs and municipalities; c) support to project preparation for municipalities; and, d) support for teachers.

**Table 1: Overview of the national context and coal regions in Czech Republic**

| Variable   | National   | Ústí region    | Karlovy Vary region | Moravian-Silesian region |
|--|------------|----------------|---------------------|--------------------------|
| Population (1.1.2022) <sup>6</sup>                 | 10,516,707 | 798,898        | 283,210             | 1,177,989                |
| Largest City                                       | Praha      | Ústí nad Labem | Karlovy Vary        | Ostrava                  |
| Population of largest city (1.1.2022) <sup>7</sup> | 1,275,406  | 90,378         | 45,500              | 279,791                  |

<sup>5</sup> See also at: <https://www.dotaceeu.cz/cs/evropske-fondy-v-nbsp;cr/programove-obdobi-2021-2027/uhelne-regiony>

<sup>6</sup> 2022 / Czech Statistical Office – see: <https://www.czso.cz/csu/czso/pocet-obyvatel-v-obcich-k-112022>

<sup>7</sup> Idem

| Variable  | National            | Ústí region           | Karlovy Vary region | Moravian-Silesian region        |
|---|---------------------|-----------------------|---------------------|---------------------------------|
| No. of coal mines (2020) <sup>8</sup>                             | 9 active / 13 total | 4 active <sup>9</sup> | 1 active            | 1 active /8 total <sup>10</sup> |
| Employment in mining in % (Q1-Q2 2022) <sup>11</sup>              | 0.5                 | 1.6                   | 2.4                 | 1.0                             |
| Employment in mining – own calculation (Q1-Q2 2022) <sup>12</sup> | 25,801              | 6,010                 | 3,282               | 5,583                           |
| Total jobs (Q1-Q2 2022) <sup>13</sup>                             | 5,140,700           | 379,800               | 134,500             | 553,800                         |
| Unemployment (11/2022) <sup>14</sup>                              | 257,187             | 29,361                | 8,063               | 40,184                          |
| Unemployment (11/2022) <sup>15</sup>                              | 3.50%               | 5.26%                 | 4.05%               | 4.87%                           |
| GDP per capita in CZK (2020) <sup>16</sup>                        | 532,178             | 371,401               | 332,037             | 415,009                         |

**The absorption capacity and level of preparation of decarbonisation and diversification projects in firms (and municipalities) is a key problem for all three regions. However, in the Ústí and Karlovy Vary regions, there is particularly low absorption capacity and limited numbers of well-prepared projects.** Thus, capacity building in the Karlovy Vary and Ústí regions will be very important to support project preparation and access to the JTF. **Although the unemployment rate in these regions is moderate for the time being, it can be expected to increase gradually not only during 2023 due to the emerging recession in Europe, but also in the longer term due to the closure of coal mining and the associated job losses.** This process may have an enormous social impact that needs to be addressed (especially in the energy, energy intensive and related sectors). This also requires different types of intervention ranging from aiding local communities to upskilling or re-skilling workers for the transition to re-integrate in the Czech labour market.

**Consequently, it makes sense to consider the Agency for Regional Development and Innovation of Moravian-Silesian as a benchmark for the implementation of the projects under the JTF.** Created in 1993, the Agency for Regional Development and Innovation has built a track-record of supported the development of good quality projects and absorbing available funding. During the previous TA project, the experience and inputs of Moravia-Silesian region has been undoubtedly reflected in a more advanced contribution for the national TJTP and from the interactions during the various project meetings by the representatives of the Moravia-Silesia region (e.g., Project Steering Committees, Transition Platform meetings and interviews). Therefore, it is critical that the other regions set-up similar organisational structures/agencies and processes. This also refers to the dissemination of successful projects (both national and EU-wide) to share good practices among potential project promoters and avoid “re-inventing the wheel” for projects that are applicable to all three regions.

### 1.3.2 RE:START, START and other existing support programmes

#### RE:START strategy

**The RE:START strategy** was established in 2015 for “regions that were lagging behind” (also called “structurally weak regions” or “structurally affected regions”) - Ústí region (UR), Karlovy Vary region (KVR) and Moravia-Silesia region (MSR). The RE:START strategy responded to specific problems of the three regions such as high unemployment rates compared to other Czech regions and high percentages of long-term unemployed people; lower regional GDP compared to other Czech regions, with a widening disparity; insufficient structure of qualification and education levels; lower R&D activities; brain-drain and, high numbers of socially excluded localities (problems with the provision of affordable housing, social exclusion and high crime rates). The overall vision was “to provide perspective for people, companies and municipalities for the future.”

<sup>8</sup> Source: <https://www.mpo.cz/assets/cz/energetika/statistika/tuha-paliva/2022/2/Uhli-2010-2020.pdf>

<sup>9</sup> 2019 / TZB-info & Ministry of Industry and Trade

<sup>10</sup> In addition, one (1) mine in preservation mode (i.e. ČSM mine) and three (3) mines were closed in previous years. See also: <https://www.okd.cz/cs/media/tiskove-zpravy/dul-csm-v-lednu-2023-vstoupil-uz-do-petapadesateho-roku-tezby>

<sup>11</sup> Source: Czech Statistical Office, Statistical bulletin - Ústí Region - 1st to 2nd quarter 2022- <https://www.czso.cz/csu/czso/e-zamestnanost-a-nezamestnanost-vsps-ft&dga9lpx>

<sup>12</sup> idem

<sup>13</sup> idem

<sup>14</sup> Source: Labor Office in the Czech Republic <https://www.mpsv.cz/web/cz/mesicni>

<sup>15</sup> Source: Labor Office in the Czech Republic, table: “Uchazeči o zaměstnání a volná pracovní místa”, see: <https://www.mpsv.cz/web/cz/mesicni>

<sup>16</sup> Source: Czech Statistical Office: <https://apl.czso.cz/pll/rocnka/rocnkavyber.volba?titul=Ukazatele%20v%20region%E1In%EDm%20%E8len%ECn%ED&mypriznak=RC&typ=2&proc=rocnka.presmsocas&mylang=CZ&jak=4>

The driving force of the RE:START strategy was the leadership of the regional actors, which were led by the Government Commissioner for the lagging regions (affiliated with the NUTS 2 Moravia-Silesia region) and his Vice-Commissioner (affiliated with the NUTS 2 North-West region). The positions of the Government Commissioner and the Vice-Commissioner were established in 2014. These two very active regional actors initiated and promoted the actions of the RE:START strategy. The mandate of the RE:START team was based on a government resolution, which was itself a signal of broad political acceptance for the RE:START Strategy.

The strategy of RE:START was derived from deep initial analysis and active dialogue with key stakeholders. It resulted in the Strategic Framework for economic restructuring of regions, published and approved by the Czech Government in early 2017. This framework established an evidence-based strategic policy, for which several Action Plans defined concrete measures and steps. The first Action Plan was approved by the Czech Government in the summer of 2017.

**The beneficiaries of the DG REFORM project “Technical Support for the preparation of a Territorial Just Transition Plan (TJTP) to the Czech Republic” for the three coal regions (Ústí, Karlovy Vary and Moravia-Silesia) in 2020-21 were dedicated to the RE:START Strategy team, which ensured synergies and efficient implementation to coordinate the TJTP.**

**On 14 December 2022,<sup>17</sup> the Government of the Czech Republic approved the 5<sup>th</sup> update of the Comprehensive Action Plan of the Strategy for Economic Restructuring of the Ústí nad Labem, Moravian-Silesian and Karlovy Vary Regions 2023-2024 through Resolution No. 1047.** The 5<sup>th</sup> Comprehensive Action Plan complements previous Action Plans approved by the Government. Its development was carried out according to implementation principles approved by the Government under the responsibility of the Ministry of Regional Development with the intensive involvement of the regions concerned.

The Comprehensive Action Plan was discussed at the Restructuring Strategy Conference with the representatives of the Chamber of Deputies of the Parliament of the Czech Republic, the Senate of the Parliament of the Czech Republic, the ministries concerned and the Ústí, Moravian-Silesian and Karlovy Vary regions. **At the same time, the implementation principles were updated to reflect organisational changes at MoRD,** but this does not affect the implementation of this Technical Assistance project in any way. The next Action Plan will be submitted in 2024.

Within the Summary Action Plan, one new measure and 14 updated measures from previous Action Plans are proposed within the thematic pillars of the Strategic Framework for Economic Restructuring of Ústí, Moravian-Silesian and Karlovy Vary regions (the framework was last updated in 2021). **The proposed measures will be implemented in the period 2023-2030. In the 5<sup>th</sup> Action Plan, the set of main development projects (linked to the Programme Just Transition (PJT)<sup>18</sup>, updating of budgets), which were also defined by the regions on the basis of the consensus of regional partners, was formally updated.** These projects are examples of the future implementation of the proposed measures. The fact that the Government has taken note of the specific intentions of the regions does not imply a commitment to their future financing. The eventual allocation of funding will be subject to a detailed assessment of the detailed applications submitted to the appropriate calls announced under the RE:START Strategy.

### **START Technical Assistance**

Another source of support for the preparation and implementation of projects within the just transition process is **START Technical Assistance**, an instrument from the European Commission.<sup>19</sup> START provides tailored, short-term support to assist efforts to decarbonise energy production and usage, diversify economic activities, and progress social development in regions and communities that are heavily affected by the transition away from fossil fuels. START can be used to help overcome shortcomings in local knowledge and capacities in areas such as: strategy development, governance, stakeholder consultation and engagement, community cohesion and resilience, and project identification and assessment. It is intended to fill gaps and complement other technical assistance and capacity-building instruments.

<sup>17</sup> Source: MoRD (2022). Schválen 5. Akční plán strategie RE:START (Approved 5. RE:START Action Plan). Available at: <https://dotaceeu.cz/cs/evropske-fondy-v-cr/kohezni-politika-po-roce-2020/uhelne-regiony/novinky/schvalen-5-akcni-plan-strategie-re-start>

<sup>18</sup> For 2021-2027, instead of 'Operational Programmes', it is now referred to as 'Programmes'.

<sup>19</sup> Source: European Commission (2022). START technical assistance. Available at: [https://energy.ec.europa.eu/topics/oil-gas-and-coal/eu-coal-regions/secretariat-technical-assistance-regions-transition-start\\_en](https://energy.ec.europa.eu/topics/oil-gas-and-coal/eu-coal-regions/secretariat-technical-assistance-regions-transition-start_en)

START provides targeted support to assist coal+ regions, sub-regions, and local communities in achieving a just transition away from fossil fuel-based activities. Support typically spans 50-100 "person days" delivered over 6-10 months. Typical applicants are public administrations or civil society organisations. Applications from smaller regional actors, such as municipalities, groupings of municipalities, and civil society organisations that actively contribute to transition processes at regional, local, or community levels are particularly welcomed. This does not, however, preclude cooperation with national-level authorities or the inclusion of other relevant regional and local actors as potential recipients of START support.

**During 2020-2021, START delivered technical assistance to seven regions, one of which was the Karlovy Vary region.** In this case, START focused on support to the Government of Karlovy Vary Region and the Association for the Development of the Microregion Sokolov – East. The support focused on the following thematic areas: employment opportunities and future skills needs; renewable energy supply and energy efficiency prospects; and viable approaches to sub-regional economic development and employment creation.

### ***DG REFORM project to support the National Development Bank for Pillar 2 of the JTM***

**The most recent initiative targeting projects for the just transition regions** is a project on "Support to the Just Transition of the Czech Republic" that kicked off in 2022 for 18 months. Its main objective is the support the National Development Bank (NDB) in setting up a Just Transition Scheme (JTS) to be proposed to the European Commission for support under the InvestEU Fund (Pillar 2 of the Just Transition Mechanism). The JTS would target large stand-alone infrastructure projects ranging between CZK 100 million and CZK 5 billion, likely to be delivered through project finance and would fall under the Sustainable Infrastructure Window and the Social Investments and Skills Window of InvestEU. If NDB is successful and selected as an InvestEU implementing partner based on this JTS proposal, the NDB could play an important role in financing the just transition of the Czech coal regions.

The project **provides support to develop a pipeline of projects to be financed under InvestEU and design tailor-made financial products to serve the specific needs of companies** in the just transition regions of Karlovy Vary, Ústí and Moravia-Silesia. In addition, the NDB needs support to improve its own capacities to assess the quality, ESG impact and risks of the submitted project proposals. The technical assistance will support the NDB to structure/set up a JTS proposal to submit at the InvestEU second call for expression of interest as to offer newly targeted financial products right after the signature of the Guarantee Agreement in Just Transition Regions.

The final outcomes target:

- Achieved participation of the NDB in the InvestEU second call for implementing partners in 2023;
- Submitted requests for **at least 10 projects per region under the InvestEU Sustainable Infrastructure and Social investments and Skills windows** in the regions of Moravian-Silesian, Ústí nad Labem and Karlovy Vary.

On 09 January 2023, the Project Team attended a meeting with representatives of PricewaterhouseCoopers (PwC) and the NDB to present and discuss the main activities of the two assignments setting the framework for identifying and coordinating any possible synergies. PwC is leading the assignment to support the NDB for Pillar 2 of the JTM.

Since the support project for Pillar 2 is also in its early stages following the submission of the inception report, it has been discussed that further details concerning the implementation of the assignment will be shared in the upcoming period. This will be done after due approval of the client, and in compliance with the General Data protection Regulation (GDPR) on both sides.

For further communication purposes, the main counterparts in each project team have been assigned and regular update meetings will take place every 4 to 6 weeks.

### ***Other support programmes***

Other support programmes are comprehensively described in the **PJT programme document** (Chapter 1.3 Investment needs and complementarity with other support), from which it follows that the programme is designed to provide additional support in the regions. The **Ministry of Environment (MoE) will set the conditions of support and calls under the programme in such a way that there is no overlap between the individual programmes**, but that the support is complementary. This will avoid double funding. Coordination will take place at the level of the Programme Monitoring Committee, thematic working groups and call preparation platforms. **Applicants from coal regions**

**can receive support from both the Just Transition Programme and other programmes at the same time.**

The most significant and relevant programmes in the period 2021-2027 include:

- **Programme Environment** - PJT complements the Programme Environment, particularly in the areas of territory rehabilitation and support for the circular economy. These are areas where the needs of the coal regions go well beyond those of the other regions and additional investment supported by the PJT is needed.
- **Modernisation Fund** - The Modernisation Fund is an instrument financed by revenues from the sale of emission allowances. Its main objective is to modernize the energy sector. While the PJT focuses on mitigating the impacts of the transition to a climate-neutral economy, the Modernisation Fund aims directly at achieving energy and climate goals. The Modernisation Fund enables support for the reduction of greenhouse gas emissions at installations in the Emissions Trading Scheme without additional restrictions. Such projects are not supported by the PJT.
- **Technologies and Applications for Competitiveness Programme** - PJT will focus on the following areas, which the Technologies and Applications for Competitiveness Programme does not adequately support: productive investments of SMEs and large enterprises that are not linked to the most innovative technologies of Industry 4.0, but correspond to regional specialisations, small aid to entrepreneurs, entrepreneurship in the cultural and creative industries.
- **Integrated Regional Programme** - PJT provides support beyond the actions identified in the Regional Action Plan, with an emphasis on education in the context of the region's transition and new challenges.
- **Employment+ Programme** - PJT complements the Employment+ Programme and supports comprehensive projects of enterprises undergoing transformation, where their employees need to increase or change their qualifications, obtain additional social assistance, etc.
- **Johannes Amos Comenius Programme** - support from the PJT will promote equitable access to and successful completion of quality and inclusive education and training.
- **National Recovery and Resilience Plan** - The National Recovery and Resilience Plan is an important complement to EU funding, covering all substantive areas of support under the PJT.
- **LIFE Programme** supports nature and landscape conservation, environment and climate projects across the EU. Some of the LIFE projects already underway may also be relevant for the PJT. The PJT Managing Authority (MA) will create opportunities/conditions that could lead to the exploitation of any complementarities and synergies with the LIFE Programme.
- **Horizon Europe Programme** is the EU's framework programme for research and innovation for the 2021-2027 period. Within the context of the Horizon Europe Programme, it is expected that the PJT will contribute in particular to the mission of Adaptation to Climate Change, including Societal Transformation.
- **Cross-border cooperation programmes** - The activities of these programmes can strengthen the effect of the PJT by adding an international dimension and exchange of experience and best practice. This is particularly relevant in the cases of Saxony and Poland, which also have border regions eligible for support from the JTF.

### *1.3.3 Transition Regions, including status of the Territorial JTP and potential project lists coordination for Environment/Energy/Economy*

The specific objective of the JTF is to enable regions and people to address the (negative) social, economic and environmental impacts of the transition to a climate-neutral economy. In this sense, the Karlovy Vary, Ústí and Moravian-Silesian regions are defined as eligible transitions in the TJTP and PJT. **The Karlovy Vary region is the least economically developed region of the Czech Republic.** It is also a region with significant lignite mining and downstream industry. **The Ústí region is the second weakest region economically after Karlovy Vary.** The region is also characterized by the extensive lignite mining, which significantly impacts the landscape and quality of life in the region. There is also a strong representation of the energy intensive industries. **The Moravian-Silesian region is not among the economically weak regions in many respects, but the consequences of coal mining in the form of the damaged landscape remain prevalent.** The region is also reliant on heavy industry which has to undergo a transition process. Therefore, significant adverse impacts of the transition to a climate-neutral economy can be expected in all three regions.

The main issues that the programme will address include:

- New, quality jobs for workers leaving the coal and related industries and for young people in the

- region in higher value-added industries;
- The dominance of employment in large enterprises in traditional industries that are threatened by the transition process;
- Insufficient capacity for research and innovation;
- Large areas left after mining and related industries, for which new use is being sought;
- Problems of enterprises, undergoing or intended to undergo a transition as a result of meeting climate targets, with the structure and skills of their workforce; and,
- The educational composition of the population, making it difficult to introduce innovations and transform the regions.

An important implementation element of the PJT will be **the groups of projects**. Focused on smaller projects, the implementation will be partially transferred to the regional level without needing a complex structure for the entire programme. **The expected allocation is CZK 1.6 billion, i.e., 4-5% of the total programme allocation**, while the support does not meet the defining features of public support and will be provided completely outside the rules for public support or as de minimis support.

## 1.4 Conclusions for the Implementation of the Project

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### *Project Context – EU and Czech Republic*

The circumstances of the socio-economic impact triggered by the uncertainty of the ongoing Russia-Ukraine war will likely continue throughout the Project duration. Although stakeholders may have already assimilated some impacts of the conflict, there is no clear roadmap on how this conflict will end. Thus, the Project Team needs to take the volatile situation into account during the work and verify whether project proposals have an adequate risk assessment.

For this Project, the official government decision on the coal phase out is not a '*sine qua non*' as there are already perspectives and timelines for a phase out (e.g., closure of the last active ČSM mine in Moravia Silesia in 2025). However, there is a risk that in view of the unpredictable geopolitical developments in Ukraine, the planned timing scenario for the withdrawal from coal production and imports set for the period 2025-2033 may not be respected, which is out of the control of this Project.

### *RE:START, START and other support programmes*

The experience of MoRD's RE:START strategy and the complexity of the interlinkages between the PJT managed by the MoE and other programmes confirms the importance that both ministries serve as national counterparties to the Project Team; collaboration has already been under way since December 2022.

It will be of utmost importance to identify potential synergies with the other DG REFORM project that supports NDB in its institutional set-up to serve as an InvestEU implementing partner and the Transition Regions with a project pipeline. It will be important to review potential overlaps of topics and stakeholders.

It will be important to identify the linkages and contributions from the other individual programmes (in addition to the PJT) as applicants from coal regions can receive support from both at the same time. A major risk for overlaps (respectively a high degree of mutual synergies in supported topics) are potentially for the Programme Environment, Technologies and Applications for the Competitiveness Programme, Integrated Regional Programme, Employment+ Programme., particularly concerning the groups of projects ('umbrella projects') where the final beneficiaries are not well tracked/known. This will help to reduce overlap and increase complementarity. How MoE sets up the mechanism when it structures the calls for the PJT will be an important item.

### *Transition Regions*

For the three transition regions, a more detailed description of the current situation and preparation of calls for groups of projects is provided later in the Inception Report (Deliverable 2 and particularly Deliverable 3). In this first part, we only state that the PJT MA will announce a call for groups or projects, which will concern vouchers for entrepreneurs – specifically for major identified gaps such as business start-up, business digitalisation, product and process innovation and product development and testing will be supported. Other calls for groups of projects will be prepared continuously in 2023.

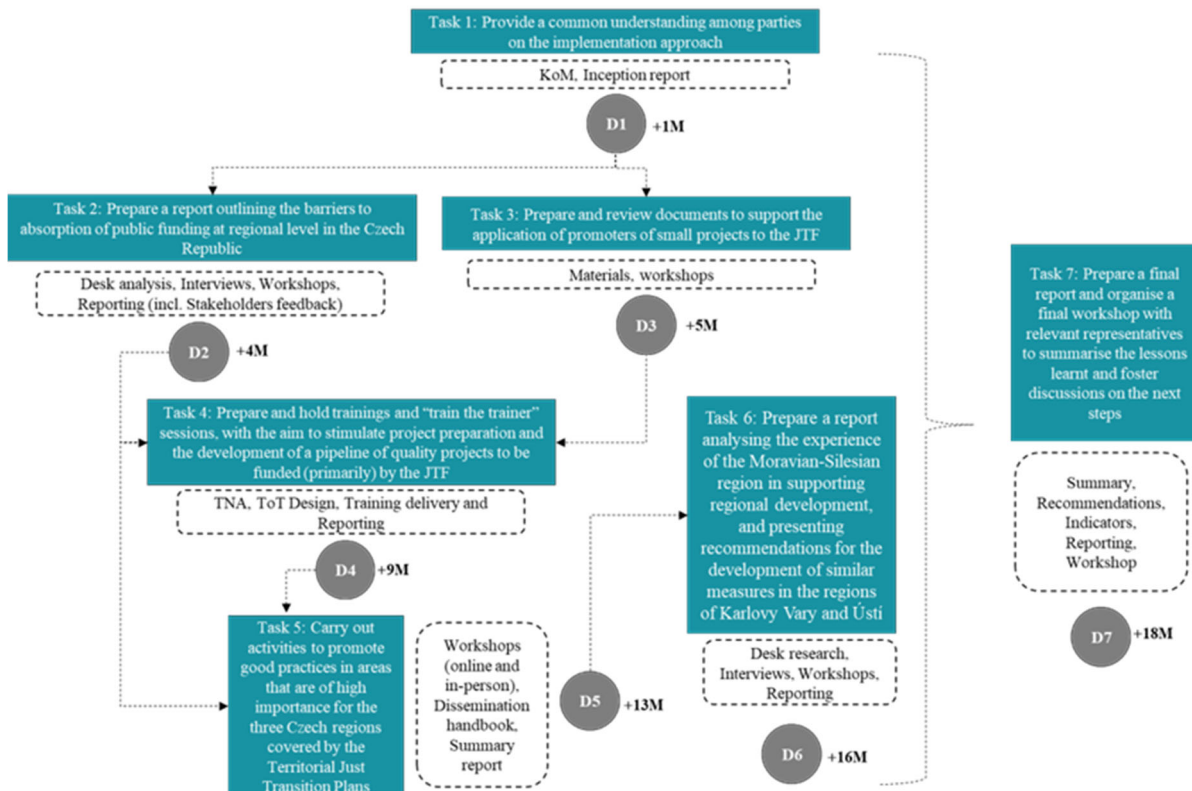
## 2. APPROACH AND METHODOLOGY

### 2.1 Overview

Our approach is structured into seven main tasks (and subsequent deliverables) and is based on our in-depth knowledge and analysis of the present situation in the Czech Republic, our experience with the TJTP predecessor project (SC/2020/111) that refers to the challenges and opportunities of the just transition process, as well as on the lessons learnt from good practices at EU and international level.

It is pivotal that the tasks are well-integrated and that the deliverables of each task feed into subsequent tasks and follow the Terms of Reference (ToR).

**Figure 1: Project Overview**



The seven interdependent tasks in this Project will generate seven deliverables (D):

1. Inception Report (refine the methodology, work plan and indicators and gather additional background information) (D1);
2. Report on lessons learnt and recommendations for the implementation of the JTF (D2);
3. Documentation for application to the JTF under umbrella schemes for small projects (D3);
4. Trainings to support the implementation of the JTF (D4);
5. Dissemination of good practices in priority areas for the implementation of the Territorial JTP (D5);
6. Recommendations for the transfer of good practices on regional development and innovation from Moravia-Silesia to the Karlovy Vary and Ústí regions (D6); and,
7. Present lessons learnt and recommendations in a Final Report (D7).

### 2.2 Activities Carried Out in the Inception Phase (Deliverable 1)

#### Organising the Kick-off Meeting

The contractor organised the kick-off meeting with over 20 participants from the European Commission, the Czech Government and the Frankfurt School Project Team. Activities included the invitation, agenda and a PowerPoint presentation to facilitate the discussion. The meeting took place

through video-conferencing via MS Teams on the 2 December 2022. Kick-off meeting minutes were circulated among the participants and are reflected upon in this Inception Report.

### *Desk Research and Review of Documents*

The desk research and review of existing documents is under way and will continue during the next phases of the Project, as relevant information and data is still being gathered. To date, a series of relevant documents were also shared by the two Ministries – MoRD and MoE. The activities related to the desk research and documentation review are further detailed in the corresponding task descriptions, particularly for Tasks 2, 3 and 5.

### *Interviews with Stakeholders*

The Project Team has organised a series of meetings with MoRD and MoE representatives to discuss the activities to be developed under the upcoming tasks in further detail, also in relation to the engagement of stakeholders through semi-structured interviews. In particular for Task 2, a selection of potential stakeholders to be interviewed has been already discussed and the final list of interviewees has been prepared in coordination with MoRD. In addition, the Project Team has exchanged information with a parallel project supporting the NDB towards participation in the InvestEU second call for implementing partners in 2023 and to support the submission of requests for at least 10 projects per region under the InvestEU Sustainable Infrastructure and Social Investments and Skills windows in the regions of Moravian-Silesian, Ústí and Karlovy Vary.

### *Inception Report Writing*

This Inception Report provides a contextual update, summarises the activities of the Inception Phase, and gives a status and timeline of the Project. The corresponding task descriptions include a detailed depiction of the updates and developments of the Project scope and implementation planning.

## **2.3 Methodology and Status of Deliverables 2 to 7**

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### **2.3.1 Deliverable 2: Report on lessons learnt and recommendations for the implementation of the Just Transition Fund**

The objective of Task 2 is to prepare a report outlining the barriers to absorption of public funding at the regional level in the Czech Republic, including those relevant for the implementation of the JTF. As part of this task, the following activities will be implemented:

- Review existing reports and data, and carry out a brief desk analysis
- Carry out stakeholder interviews and surveys
- Prepare a Draft Report to be presented to the Steering Committee, and revised based on comments
- Implement three workshops for stakeholders
- Finalisation of the report and its presentation

The starting points for Task 2 in the Inception Report were discussed at the kick-off meeting and especially at the following online meetings with MoRD and MoE representatives (on-line):

- 6 December 2022: MoRD (RESTART department)
- 20 December 2022: MoRD, MoE

**Inception Phase findings:** Based on the kick-off meeting discussions and interviews with MoRD and MoE representatives, it emerged that the deliverables of this Project should be more practical, especially in relation to potential users like small stakeholders and applicants in the coal regions' calls for "group of projects." From this viewpoint, the Project Team will differentiate between general factors (e.g., current ESIF spending in the regions, current studies and analyses) and specific factors affecting the absorption capacity of the so-called groups of projects, which will support small projects (according to the focus of topics and particular regions). Analyses, questionnaires and three workshops in the regions will be adapted to this perspective. In the Inception Phase, the team focused on identifying available documents, categorizing the list of people for guided interviews, as well as specifying the main structure of questions for guided interviews has been discussed with representatives of MoRD and MoE until mid-January 2023. Based on at least 60 guided interviews, which will take place until mid-March 2023, a Draft Report will be written, which will be discussed within the Steering Committee, and then the final verification of findings will take place in three regional workshops with stakeholders.



### **Review of existing reports and data - brief desk analysis**

This task will include **desk research of basic information and programming documents** related to the just transition process, which are available on the following web portals:

- DotaceEU.cz - Coal regions
- (Operational)<sup>20</sup> Programme Just Transition – State Environmental Fund of the Czech Republic (sfzp.cz)
- Monitoring Committee –Programme Just Transition (opst.cz)
- Programme Just Transition 2021–2027 - Ministry of the Environment (mzp.cz)

In addition, **basic overviews of current ESIF spending in the Czech Republic for the 2014-2020 programming period** will be compiled. According to consultations with MoRD representatives, the overview focus on selected key programmes, e.g., Enterprise and Innovation for Competitiveness, Research, Development and Education, Employment, Transport, Environment, Integrated Regional Programme, Prague – the Growth Pole of the Czech Republic. Emphasis will be placed on comparing the situation of total spending, the average and median amount of spending and the number of projects in comparison with other regions of the Czech Republic (total and per capita). Furthermore, summaries of spending and the number of projects according to the legal form of the beneficiaries will be compiled so that it is possible to identify the intensity of spending according to the key entities that can apply in the group of projects scheme in the coal regions, e.g., SMEs, municipalities and non-profit organisations. Overviews will also be prepared for unsupported projects (unsuccessful applicants in ESIF programmes) in terms of the number of submitted applications, their planned budgets, and, if possible, a distinction down to the level of municipalities with extended scope, so that it is possible to compare intra-regional differences in individual coal regions.

This task will comprise **desk research, data collection and analysis** on the levels of spending per region, assessments, reports that concerns the absorption capacity of public funding at the regional level and those relevant for the implementation of the JTF and including the Cohesion Funds. The analysis will also build on existing reports, including research carried out by the International Sustainable Finance Centre in the Ústí region as well as on the analysis that has been done within the CZ TJTP project (SC/2020/111) that analysed the situation as of June 2021. Here, the TA team provided the first results of this assessment in relation to the absorption capacity of JTF (i.e., the availability and readiness of meaningful projects). Another important input would be to get access to the latest information on the project pipelines that already exist in each of the three coal regions and the contact to project promoters focusing on the small projects. This issue will require additional coordination between the Team Leader, MoRD and representatives of each region. Depending on the situation in the regions, it will then be reflected in D2 or other project deliverables.

Following the ESIF spending and the comparison of data for unsuccessful applicants, the results of the evaluation survey, which focused on awareness of EU funds in coal regions (results for December 2021) will be taken into account. According to representatives of MoRD, only the ex-post evaluation of the period 2014-2020 for the Moravian-Silesian Region is available<sup>21</sup>. Other evaluations and analyses will be carried out in connection with the conditions of spending, as well as evaluations regarding the use of financial resources from the period 2014-2020 until the end of 2023, which is outside the timeline of the dates for Deliverable 2 but could be updated in the Final Report (Deliverable 7).

### **Conduct stakeholder interviews and surveys**

At least 60 interviews are envisioned at the regional and national level. The interviews will be face-to-face and, whenever possible, online to have a higher outcome of interviews. The interviews will be analysed and key findings will be summarised in an interview report. These insights will be part of the report on lessons learnt and recommendations for the implementation of the JTF. The typology of the respondents is also determined by the focus of the planned schemes of groups of projects in regions (see Tables 2 and 3).

**Table 2: Programme Just Transition: Groups of projects in Czech coal regions**

| Karlovy Vary region               | Ústí region                       | Moravian-Silesian region          |
|-----------------------------------|-----------------------------------|-----------------------------------|
| Main focus on groups of projects: | Main focus on groups of projects: | Main focus on groups of projects: |

<sup>20</sup> For 2021-2027, 'Operational Programmes' are now referred to as 'Programmes.'

<sup>21</sup> See: [DotaceEU - Výsledková evaluace přínosů evropských fondů na regionální úrovni](#)

| Karlovy Vary region  | Ústí region  | Moravian-Silesian region   |
|--|--|--|
| <ul style="list-style-type: none"> <li>support for cultural and creative industries, start-ups and the general segment of support for small and medium-sized businesses;</li> <li>digital vouchers for small and medium-sized enterprises and the public sector;</li> <li>support of human resources in schools; and,</li> <li>support for the preparation of public sector projects.</li> </ul> | <ul style="list-style-type: none"> <li>support for cultural and creative industries, start-ups and the general segment of support for small and medium-sized businesses;</li> <li>digital vouchers for small and medium-sized enterprises and the public sector; and,</li> <li>support for the preparation of public sector projects.</li> </ul> | <ul style="list-style-type: none"> <li>support for cultural and creative industries, start-ups and the general segment of support for small and medium-sized businesses;</li> <li>support of human resources in schools; and,</li> <li>support for the preparation of public sector projects.</li> </ul> |

The list of interviewees was prepared based on the ToR requirements and feedback from the kick-off meeting participants, namely the concerned municipalities, relevant NGOs, Local Action Groups (LAG), the Association of Local Authorities of the Czech Republic (SMSČR), CzechInvest, the Czech Association of Small and Medium-Sized Enterprises and Crafts (AMSP), and organisations involved in regional development such as chambers of commerce and trade unions, but also including stakeholders identified during the CZ TJTP project (SC/2020/111), experts from universities in the coal regions, representatives of regional authorities and experts from regional innovation centres. LAGs are of particular importance, as they can significantly support small projects, especially in the rural areas of coal regions, and they also have an overview of the specific micro-regional situation (who submits applications, who does not, reasons and context). Moreover, SMEs and NGOs are prioritised to get relevant input. During December 2022, specific individuals and types of respondents were already discussed with MoRD representatives. The expected distribution of respondents according to type and status (national vs. regional level) is shown in Table 3. This table was also agreed upon with representatives from MoRD and MoE on the 6<sup>th</sup> of February 2023. The number of interviews listed in Table 3 are the minimum that the team will adhere to. However, it is possible that the total number of interviews will eventually be higher, also following the possibility of conducting online interviews.

**Table 3: Estimated distribution of respondents according to type (focus) and position (national vs. regional level)**

| Type of respondent   | National units/<br>Associations | Ústí      | Karlovy Vary | Moravian-Silesian | Total     |
|--|---------------------------------|-----------|--------------|-------------------|-----------|
| Association of Small and Medium Enterprises (AMSP)                                 | 1                               |           |              |                   | 1         |
| Czechinvest agency (regional offices - to contact them - recommendations for SMEs) | 1                               |           |              |                   | 1         |
| LAGs   |                                 | 4         | 3            | 4                 | 11        |
| Center for Transport and Energy (NNO)  | 1                               |           |              |                   | 1         |
| Representative of the Regional Standing Conference (RSC)                           |                                 | 1         | 1            | 1                 | 3         |
| Regional economic chambers   |                                 | 1         | 1            | 1                 | 3         |
| Society for Rural Renewal (SPOV)   | 1                               |           |              |                   | 1         |
| Association of Local Governments of the Czech Republic                             | 1                               |           |              |                   | 1         |
| Representative of small towns (UTM CR)   |                                 | 2         |              |                   | 2         |
| Representatives of municipalities  |                                 | 3         | 5            | 5                 | 13        |
| Representatives of NGOs/schools/universities                                       |                                 | 2         | 2            | 2                 | 6         |
| Representatives of SMEs  |                                 | 5         | 5            | 5                 | 15        |
| Consulting companies   |                                 | 1         | 1            | 1                 | 3         |
| <b>TOTAL</b>   | <b>5</b>                        | <b>19</b> | <b>18</b>    | <b>19</b>         | <b>61</b> |

The Project Team's method of communication with respondents will be closely coordinated with MoRD representatives. The Project Team prepared letter of credentials during January 2023 that explains the role of the Project Team to entities in the coal regions. These letters were prepared on MoRD letterhead and then used to reach respondents.

Based on the results of the research in previous activity, a guideline for semi-structured stakeholder interviews will be prepared. Before starting the interviews, we prepared the list of interview questions

to MoRD so that they can provide feedback and agree on the final set of questions. It may also be useful to have a couple of slides at hand about the Project and the PJT goals as an introduction.

The spectrum of respondents for the interviews is wide, so the questions will be tailored to types of respondents. Table 4 shows the questions and form of the interview with specific types of respondents.

**Table 4: Focus of interview questions according to types of respondents**

| Interview section/<br>focus<br>questions  | National Units /<br>Associations /<br>Representatives of<br>regions (e.g., RSC)  | Representatives of<br>municipalities  | Representatives of<br>NGOs/schools/<br>universities  | Representatives of<br>SMEs   |
|---|--|---|--|--|
| <b>The opening section of the interview</b>   | This section will be more concise as we assume that the respondent will be well acquainted with the situation in the PJT. Only introductory information on the TA Project will be provided.  | Basic information on the TA Project will first be provided. Then, we will provide the respondent with more detailed information on the current status and possibilities in terms of small projects in the PJT, i.e., focus, scope, expected calls from regions, etc. Respondents will also be informed on where to find appropriate information about PJT funding.  |  |  |
| <b>Existing experience of the respondent</b>  | Questions to evaluate the situation of a respondent from the perspective of a representative of a national institution/association.  | Questions on previous experience with the submission and implementation of projects financed by EU programmes. Questions on the experience of municipalities with investment topics that will be supported from PJT.  | Questions on previous experience with the submission and implementation of projects financed by EU programmes. In the case of the Karlovy Vary Region, the questions will focus on the experience of schools with the support of their human resources, results to date, current needs. In the Moravian-Silesian Region, the questions focus on the situation of universities and the support of young scientists. | Questions on previous experience with the submission and implementation of projects financed by EU programmes. Specific questions will focus on experiences with the topic of cultural and creative industries as well as the use of innovative vouchers in cooperation with the public sector.  |
| <b>Potential barriers to small project applications</b>                               | Questions regarding the structure and content of expected relevant calls for the group of projects, adequacy and potential barriers in relation to the respondent's national entity/association profile.   | Potential barriers for submitting small projects have the same thematic basis, but different results can be expected according to particular groups of respondents. The questions will focus on respondents' awareness of PJT topics, anticipated challenges, specific needs for methodological assistance in the given topics. At the time of the interviews, the basic framework of the administrative conditions for applying for vouchers for entrepreneurs (spring 2023) should be clearer, which will be included in the questions in order to identify bottlenecks of absorptive capacity. |  |  |
| <b>Possible solutions / Specific options for small projects (potential readiness)</b> | In the case of representatives of national entities/associations, an expert contribution is expected in this section of questions focused on the possibilities of specific activities, steps or changes that could be implemented to strengthen absorption capacity, e.g., defining specific possibilities of assistance for small projects (applicants/beneficiaries), financing (eligible expenses, cash-flow/payments). | Questions focused on the level of preparedness of specific topics of possible PJT projects by the public sector, expected scope of projects, definition of the need for assistance to support preparation.  | Questions focused on the specific possibilities of respondents (schools, universities, NGOs) in the preparation of small PJT projects. Definition of possible solutions expected, scope of small projects (eligible expenses, financing - cash-flow). Needs in terms of scheduling calls.  | Questions focused on the degree of readiness for specific possibilities of using digital vouchers (see call spring 2023) in cooperation with the public sector (topics, substantive and financial scope, period). Furthermore, the readiness of smaller projects in the fields of cultural and creative industries, start-ups and SMEs in general. |

### **Write Draft Report and present it to the Steering Committee**

A first draft report will be developed and presented to the Steering Committee. This also will include the presentation to be held at the different stakeholder workshops in each of the three coal regions.

At this stage, it will be of utmost importance to agree on the findings related to the bottlenecks and barriers as well as the recommendations targeting the absorption of public funding in general (e.g., EU Cohesion Funds) and specifically for the absorption of JTF funding. Here, small actors, such as youth, NGOs, small municipalities and SMEs will merit specific attention.

Based on the comments of the Steering Committee, the Draft Report will be revised and updated for the presentation in the different regions.

### **Implement stakeholder workshops**

Based on the information gathered through ongoing work, we will organise **three stakeholder workshops (one for each coal region)**. Given that the basic problem areas of absorption capacity are the same for all types of respondents, representatives of all relevant applicants for groups of projects will be invited to individual regional workshops. In agreement with MoRD representatives, these workshops will also be brought in line with the activities of the PJT Communication Plan for 2023, which will create a synergy of this TA Project with the necessary support to raise awareness among potential applicants about the possibilities of PJT.

After feedback, the report will be finalised and presented to the Steering Committee.

#### **2.3.2 Deliverable 3: Documentation for application to the Just Transition Fund under umbrella schemes for small projects**

The objective of Task 3 is to prepare the documentation for application to the JTF under the “groups of projects schemes” also referred to as “umbrella schemes for small projects.”

Task 3 consists of four interrelated activities, including (1) review of templates and guidelines for individual groups of projects in the Karlovy Vary and Ústí regions; (2) identification and compilation of inspiring projects; (3) organisation of workshop(s) for stakeholders together with a preliminary presentation of outcomes for the Steering Committee to obtain feedback; and, (4) finalisation of the deliverable based on the feed-back.

Similar to Task 2, the starting point for this activity occurs during the kick-off meeting and other meetings with representatives from MoRD and MoE.

**Overview on process of groups of small projects:** Groups of projects schemes for small projects enable a partial transfer of implementation to the regional level without the need for a complex structure of the entire PJT. The important thing is that groups of projects are managed by the MoE, as PJT’s managing authority, and regions only implement these umbrella schemes as specific projects with the rules set in advance. As part of the groups of projects schemes, only the regional public authorities (regional offices of Karlovy Vary, Ústí and Moravian-Silesian regions) will receive support from the PJT. In the role of a subsidy provider, they will grant individual support to the final beneficiaries outside the common electronic system of EU funds (each region has its own administrative system). All obligations for recipients of EU funds will apply to the regional authorities, which are accountable to the MoE for grant implementation. However, regional public authorities design their own administration of small grants for final beneficiaries. The region will, among other things, keep records of submitted small projects and will regularly report information on the amount of public support provided and project’s outcomes to the managing authority. This mode will be used mainly for smaller template-like projects with support of EUR 100,000 and less (e.g., SMEs, NGOs, municipalities). Individual support to final beneficiaries will not exceed EUR 200,000 and is expected to be significantly lower on average.

### **Inception Phase findings:**

Delivery of the outputs from the task is due in **Month 5 (April 2023), which is not coherent with the timing of the relevant parts of the PJT**. Based on the discussion with MoRD and MoE representatives regarding the planned calls for proposals for regions and responses from the regions about readiness of documentation of groups of projects schemes, we propose postponing the deadline for Deliverable 3. This will affect the timing of activities within Task 3, which will be spread over a longer period and will be implemented continuously, especially in relation to the review of regional documents (guidelines and templates) and workshops. However, work on illustrative examples for different groups

of support schemes could be prioritised, even with regard to the interviews in Task 2. In this direction, the expert team is prepared to be very flexible in relation to the needs of the regions and the MoE.

Due to the uncertainty and risks associated with the timing of the internal processes of the regional authorities and the MoE, we propose moving the deadline for Deliverable 3 to the end of June 2023.

Calls for proposals for the first thematic groups of projects are being prepared for Q1/2023, with an expected submission deadline of June 2023 for business vouchers (calls for other thematic schemes will follow in following months). For this reason, our Project Team is flexible in relation to the needs of regional authorities of the Ústí and Karlovy Vary regions to prepare groups of projects (umbrella schemes for small projects). Priority will be given to the review of documents related to the first calls. Reviews of other documents and compilations of examples with typical projects may follow later, along with workshops for stakeholders.

### **Review of the templates and guidelines for application prepared by the regions**

Regions are already working on the necessary proposal **documentation to submit groups of projects to the PJT**. However, the **call for proposals was not officially announced/opened by MoE**, thus our Project Team does not know the exact parameters of calls and the requirements for beneficiaries, i.e., regional authorities. **We expect to receive this documentation continuously in the first half of 2023. Relatedly, we are also waiting for the wording of calls prepared by regions themselves for final beneficiaries (SMEs, municipalities, NGOs, etc.)**. Once available (depending on the readiness of the documents by the regions), we will review the templates and guidelines for application prepared by the regions for each group of projects scheme and deliver recommendations for improvement where relevant. Based on the planned number of groups of projects schemes and their structure (see details below) we expect to review approximately 10 documents<sup>22</sup> for both regions. We assume continuous delivery of reviews and recommendations of individual templates and guidelines during February and May 2023.

### **Three documents are essential for the implementation of groups of projects:**

- The criteria for selecting groups of projects approved by Monitoring Committee of the Programme of Just Transition (PJT).
- The **binding instructions** set the rules by which the region is obliged to follow from the submission of the application for support from the PJT to the final closure of the project by the expiry of the sustainability period of all projects of the final beneficiaries - the document is presented for the overall context.
- The **methodological recommendation** for setting up the management and control system of regions for the implementation of groups of projects scheme (the annex to the binding instructions), which recommends procedures to set up the management and control system in the region.

It is expected that **template-like projects (or voucher projects) will be submitted, which will be relatively easy to administer**, both on the part of the regions and on the part of the beneficiaries themselves. **However, it is probable that each region will have its own system for small project applications, monitoring and management**, although there are attempts of coordination from MoE. The current set up is designed regarding the specific institutional and capacity background of individual regions. Our Project Team will take these differences into account during the review of particular thematic groups of projects schemes (see Table 2 in the previous section “*Programme Just Transition: Groups of projects in Czech coal regions*”).

### **The time schedule and details of next planned PJT calls for proposals were clarified in January 2023 as follows:**

- It seems that **support for businesses (start-ups, innovation vouchers and digital vouchers) will be merged into one thematic group of projects** in each region (with planned calls for proposals in Q1/2023).
- However, it is expected that the allocation will be divided into at least two overarching projects that follow each other (meaning at least two calls for proposals at the level of the PJT).

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<sup>22</sup> Estimated group of project calls: 1. start-ups; 2. innovation vouchers; 3. digital vouchers; 4. vouchers for film SMEs (UK); 5–8. vouchers for public sector (KVK + UK): creative vouchers, recruitment of teachers/academics; 9-10. vouchers for a preparation of public sector projects (KVK+UK) etc.

- Another planned call for proposals (Q1/2023) is expected for the Ústí region only with a focus on support for creative industries (SMEs from the film sector).
- The next calls for proposals (Q2/2023) will focus on vouchers for the public sector, and it seems that the call will merge support of human resources in schools and creative vouchers.
- Other groups of projects schemes are expected with focus on support for the preparation of public sector projects.

**Table 5: Indicative schedule of calls for groups of projects for the year 2023**

| Call name                  | Call type  | Model of assessment | Supported activities   | Recipients                                   | Call opens | Call deadline | Allocation (in EUR) |
|----------------------------|------------|---------------------|--|--|------------|---------------|---------------------|
| Vouchers for entrepreneurs | Continuous | Single-stage        | Vouchers for SMEs: business development voucher, digital voucher, innovation voucher | Regional authority: Karlovy Vary Region      | Q1/2023    | Q2/2023       | 1 770 000           |
| Vouchers for entrepreneurs | Continuous | Single-stage        | Vouchers for SMEs: business development voucher, digital voucher, innovation voucher | Regional authority: Ústí Region              | Q1/2023    | Q2/2023       | 6 250 000           |
| Vouchers for entrepreneurs | Continuous | Single-stage        | Vouchers for SMEs: voucher for business development, innovation voucher              | Regional authority: Moravian-Silesian Region | Q1/2023    | Q2/2023       | 10 000 000          |
| Movie vouchers             | Continuous | Single-stage        | Vouchers for SMEs from film sector   | Regional authority: Ústí Region              | Q1/2023    | Q2/2023       | 2 085 000           |
| Vouchers for public sector | Continuous | Single-stage        | Teacher Recruitment allowance, Creative Voucher, Digital Voucher                     | Regional authority: Karlovy Vary Region      | Q2/2023    | Q3/2023       | 1 770 000           |
| Vouchers for public sector | Continuous | Single-stage        | Project preparation, creative voucher,   | Regional authority: Ústí Region              | Q2/2023    | Q3/2023       | TBC                 |
| Vouchers for public sector | Continuous | Single-stage        | Incentive grants for researchers, project preparation, creative voucher              | Regional authority: Moravian-Silesian Region | Q2/2023    | Q3/2023       | 4 170 000           |

Source: MoE, January 2023

### **Examples of templates with typical projects for inspiration**

**Based on discussions with regional representatives, MoRD, MoE and other relevant stakeholders (including interviews in Task 2),** examples with typical projects for inspiration will be drafted. Moreover, the example templates used for inspiration will include the valuable experience of both our local expert teams and our international experts that can bring in experience from other countries with similar situations. In the selection of a typical project, we will reflect local expertise in good practice examples in regions that could be replicable via groups of projects and has a high transformative potential in the regions. Another preliminary dataset for examples selection could be **project fiches filled in by the project promoters** that have been standardised across the regions and include important elements such as project name, project code, project promoter, contact details, project partners, estimated total cost, initial situation, project description, date of realisation, project location/ expected area of impact, overlap of the project to another region as well as the key activities according to the nature of the project – preparatory, implementation phase (integrated projects with a number of sub-activities interrelated/interconnected, combining investment/non-investment activities, e.g., construction of a building, technology, educational/research activities, etc.). Of course, the specifics of small projects will be considered. Selected examples could be updated based on the workshops with stakeholders.

To **develop two illustrative cases for the various groups of support schemes,** the following categories will be considered:

- a) Support to SMEs, including a range of measures and subtopics (e.g., start-ups, product and process innovation product development and testing, digitalisation: audio-visual production);
- b) Recruitment allowance for new teachers and education allowance (valid only for Karlovy Vary region);
- c) Creative vouchers for SMEs and municipalities; and,
- d) Support to project preparation for municipalities.

#### ***Organisation of a stakeholder meeting to present the draft materials***

We will organise **stakeholder workshop(s) in early June 2023** to obtain feedback on the draft materials (e.g., reviewed applications and illustrative cases of example templates). Although there are significant similarities in the focus of the groups of projects (with exception of support of human resources in schools), schemes could differ in their administrations and thus partial requirements for final beneficiaries. **The extent of the differences is yet to be discussed – and only on this basis will the procedure regarding the organisation of the workshops be more precisely specified.** If conditions allow, one joint workshop could be organised to get better feedback from key stakeholders across regions. However, due to the postponement of the preparation of guidelines and templates, it could be beneficial to organise a separate, earlier workshop to present and discuss examples of templates with typical projects for inspiration (possibly in April 2023).

The **key target groups** invited to the workshop include regional representatives from the concerned authorities, small local municipalities, SME representatives, NGOs and project promoters involved in small projects. It is expected that a wider representation of stakeholders will be invited for the presentation of example templates with typical projects for inspiration, whereas a narrower selection of (informed) stakeholders will be invited for presentation of the results from the document reviews.

We will focus on **presenting the findings of the revised applications as well as the examples**, obtaining feedback and discussing stakeholder comments. Our approach would be to share the presentation about the revised draft documents, agreed upon with the SC, with stakeholders 10 days ahead of the meeting. After the workshop, time will be given to send additional comments. The feedback will be processed and incorporated into the final version of the deliverable.

#### ***Finalising the deliverable after feedback***

The first draft materials will be presented to the Steering Committee. An (online) stakeholder meeting will also be held to discuss the draft materials (the list of invitees is to be cleared by the Steering Committee). Based on the comments of the Steering Committee, the draft materials will be revised and updated for the presentation in the stakeholder workshop. **Due to the postponements, it is possible to divide the presentation of materials related to the examples of templates with typical projects for inspiration and the document review prepared by regional authorities.**

As a final outcome and **D3, the final documentation for application to the JTF under the “groups of projects” schemes for small projects** will be completed by incorporating the feedback from the stakeholder workshop and the SC (who will also review the final version).

The documentation will provide a solid basis for the application process while also providing inputs for the training efforts within the Project (D4) through the provision of inputs and information that is validated by regional and national stakeholders.

#### **2.3.3 Deliverable 4: Trainings to support the implementation of the Just Transition Fund**

The aim of Deliverable 4 is to prepare and hold trainings and “train the trainer” sessions, with the aim of stimulating project preparation and developing a pipeline of quality projects to be funded (primarily) by the JTF, for small projects and project promoters with limited capacity (such as municipalities, NGOs and SMEs) primarily for the Ústí and Karlovy Vary regions and a train-the-trainers at the national level. It includes the following activities:

- Analysis of needs and curriculum design for direct trainings (hereafter referred to as “workshops”);
- Design of the “train the trainer” sessions;
- Training delivery (including trainings for small project developers and train-the-trainer sessions); and,
- Reporting on trainings, including recommendations/suggestions for future training events.

Findings base on the outcome of the kick-off meeting, desk research and contacts during the Inception Phase with stakeholders from the regions.

### Inception Phase findings:

- **Other information and training activities** are already implemented or planned in both regions (e.g., by local action groups, regional authorities, municipalities and by this Project). The Project Team will map these activities during the interviews with stakeholders and reflect their timing in the training schedule.
- **The impossibility to organise trainings during the summer months (June–August)** needs to be considered when scheduling the trainings.
- **The time schedule of the next planned PJT calls** may not be coherent with the timing of the foreseen Project activities, which would affect the interest and the participation in the trainings. It is one of the important topics to be discussed within Steering Committee. Therefore, coordinating the trainings together with MoE and MoRD is considered crucial. Two additional items would be helpful to navigate the already provided overview of calls. First, a **rough estimation of PJT call deadlines** (month) to provide the potential applicants with in-time information. Second, the **time schedule and contents of other PJT information events** to avoid double presentations and help coordinate, maximizing the impact to beneficiaries.
- The first PJT (Programme Just Transition in Czechia) revealed several **bottlenecks** preventing full absorption capacity of the programme, particularly in the field of **business (SME) support** (e.g., lack of start-up consultancy support and restricted support to SME digitalisation). The monitored bottlenecks need to be discussed with the managing authority (MoE) and ideally solved before the training sessions.
- **Division of public and private participants separately in trainings:** Although we proposed training sessions according to tender specifications, i.e., dividing public and private target groups, there are some circumstances to consider. Nevertheless, the insufficient cooperation among regional or local public and private stakeholders is one of the barriers identified in both regions. The common trainings and events would naturally support informal meetings, networking and potential cooperation between private and public representatives. **Therefore, we recommend organising at least some workshops for both target groups to facilitate personal contacts and exchange of information.** MoRD agrees with common workshops in case the topic of the workshops will be similar for both target groups. It will be confirmed after the interviews and once the topics are selected. The joint events (if applicable) are planned for autumn 2023 (WS 7-10).

### Preliminary training schedule

The start of training sessions is planned for the second half of **April 2023** (after 17.4.2023) and will presumably **finish** by the end of **September 2023** (30.9.2023) (Table 6). We will propose accurate dates after interviews and discuss it with MoRD and MoE to coordinate with their JTF information activities. The dates of the autumn sessions will be confirmed before summer, after discussions with MoE, MoRD and the Project Team, including the decision on the eventual joining of events with similar topics (e.g., good practices together with thematic workshops selected in interviews).

**Table 6: Updated training schedules**

| Workshops (trainings) No. | Week   | Place                        | Target group PUBLIC Municipalities, NGOs | Target Group PRIVATE SMEs, NGOs          |   |
|---------------------------|--|------------------------------|--|--|---|
| WS1 & WS2                 | 17 – 28 April 23<br><i>to be confirmed (tbc)</i> | Karlovy Vary                 | PJT + Project Design & Management (PM)   | PJT+PM                                   |   |
| WS3 & WS4                 | 17 – 28 April 23<br><i>tbc</i>                   | Ústí n. L                    | PJT+PM                                   | PJT+PM                                   |   |
| WS5 & WS6                 | June 23  | Most+Sokolov<br><i>(tbc)</i> | PJT+PM (UR) trained by T-T participants  | PJT+PM (KVR) trained by T-T participants |   |
| WS7 & WS8                 | 11-15 Sept. 23<br><i>tbc</i>                     | Karlovy Vary                 | tailored topics                          | tailored topics                          | gathering follow-up queries from participants |
| WS9 & WS10                | 11-15 Sept. 23<br><i>tbc</i>                     | Ústí n. L                    | tailored topics                          | tailored topics                          |   |



| Workshops (trainings) No.         | Week                      | Place  | Target group PUBLIC Municipalities, NGOs      | Target Group PRIVATE SMEs, NGOs       |                                    |
|-----------------------------------|---------------------------|--|---|---------------------------------------|------------------------------------|
| Training of trainers T-T sessions | Week                      | Place  | Group A Ústí Region <sup>23</sup>             | Group A Karlovy Vary R. <sup>24</sup> | Group B: Experienced Organisations |
| T-T1 & T-T2                       | May 2023                  | online   | methodology                                   |                                       | methodology                        |
| T-T3, T-T4 & T-T5                 | 9-12 May 23 <i>tb.</i>    | <i>Most + Sokolov in coop. with municipalities (tbc)</i> | PJT+PM  | PJT+PM                                | Prague (PJT+PM, advanced)          |
| T-T6 & T-T7                       | 16-20 May 23 <i>tbc</i>   | <i>Chomutov + Cheb in coop. with LAGs (tbc)</i>          | PJT+PM  | PJT+PM                                |                                    |
| T-T8 & T-T9                       | 23-30 May 23 <i>tbc</i>   | <i>Děčín AŠ in coop. with SMEs/NGOs (tbc)</i>            | PJT+PM  | PJT+PM                                |                                    |
| T-T10                             | 18-22 Sept. 23 <i>tbc</i> | online   |   |                                       | (tailored topic)                   |
| T-T11 & T-T12                     | 25-27 Sept. 23 <i>tbc</i> | online   | gathering follow-up queries from participants |                                       |                                    |

### **Proposal of preliminary training topics**

The training programme will focus on the Programme Just Transition in Czechia in general and touch upon areas important for project preparation, project finance and long-term project planning, including EU funding overview and principles.

**The first four workshops (WS 1-4)**, titled “Programme Just Transition in Czechia” (PJT) & “Project Management” (PM), will presumably be organised during the second half of April 2023. In each region (Karlovy Vary and Ústí), two workshops will be organised for two groups of potential applicants from private and public sector.

**The first part of training sessions** (titled “Workshops” in the Inception Report) will focus on the following topics (to be confirmed and/or further specified after the conclusions of Deliverables 2 and 3):

#### **1. Overview of PJT in Czechia (abbreviated as OPST in Czech language)**

- Structure of PJT, key objectives, covered areas
- Planned calls, eligible applicants, application procedure (*This part will be coordinated with MoE and adapted accordingly*)

#### **2. PJT Project Design and Management (PM)**

- Introduction to the just transition: Regional/local challenges and solutions relevant to project design
- Project relationship to local/regional/national/EU strategies linked to the just transition
- Project design, outline of stages, project plan
- Partnership, cooperation, partner roles and responsibilities
- Deliverables, outputs, long-term impact, sustainability
- Time schedule, milestones (Gantt)
- Quality and risk management
- Do no significant harm
- Budget

<sup>23</sup> These trainings are the most uncertain from a target group perspective. The training will be highly influenced by the trained trainers and their background. We expect the most intensive cooperation with LAGs, i.e., both events will focus on a public or mixed audience.

<sup>24</sup> Idem

- 3. Case studies** (2-4 examples adapted to the participant groups (public/private, non/investment projects). The case studies would come from 1<sup>st</sup> call (if possible), otherwise the TSI provider comes with other applicable examples that would be discussed with MoRD and MoE.
- 4. EU and other Funding overview** (Other financial sources available in CZ/EU supporting relevant transition projects not eligible under PJT)

Each workshop will include group/individual work based on short assignments and an interactive discussion or Q/A part at the end of the training section.

#### **The train-the-trainer sessions (T-T)**

- The train-the-trainer (T-T) sessions will distinguish two target groups: (1) less experienced trainers and (2) advanced trainers. Potential trainers will be recruited during the initial workshops (see above) in cooperation with stakeholders, namely LAGs, business support organisations, regional authorities and agencies, large municipalities.
- Two online methodology trainings will be offered to both groups: the less experienced (T-T1) and the advanced trainers (T-T2). The methodology trainings will consist of an introduction on presentation skills and a practical guide on the (co)-organisation of events, including online events. The trainings will be offered to all participants of T-T sessions, presumably in May 2023.
- The T-T sessions will focus on the same thematic areas as the first four workshops (i.e., the PJT in Czechia & Project Management), with a special focus on the participating target group sector and needs, distinguishing between the less experienced and advanced levels of trainers. Each training will include group/individual work based on short assignment and an interactive discussion or Q/A part at the end of the training section.
- Three T-T sessions for the less experienced trainers will be held in both target regions – Karlovy Vary (T-T3, T-T6, T-T8) and Ústí (T-T4, T-T7, T-T9), presumably in cooperation with diverse local or regional partners (e.g., regional authorities, local action groups, municipalities, SME/business supporters, NGOs). Most T-T sessions for less experienced trainers will be organised after the first four workshops – the implementation is planned for May and the beginning of June 2023.
- In addition, two T-T sessions will be organised for advanced trainers – one in-person event in Prague during May 2023 (T-T5) and one online session, presumably in September 2023 (T-T10). The aim of the session is to set the stage and align on the principles and procedures for the project cycle. The final online T-T11 session follows up with participants and is planned for the end of September 2023.
- The trained trainers will assist to the **5<sup>th</sup> and the 6<sup>th</sup> workshops**, presenting the PJT in cooperation with the contractor during June 2023. They will be recruited during the train-the-trainer events or in cooperation with stakeholders.

**The second round of regional workshops** (i.e., the last four workshops: WS7-WS10) will be fully adapted to the most required thematic topics identified in the Deliverables 2 and 3 following feedback after the first part of workshop (through online questionnaires to participants). Proposed thematic topics (to be amended based on demand) include:

- SME/Business support;
- Education support;
- Environmental issues, rehabilitation of former mining areas;
- Participation and involvement of stakeholders; and,
- Other required topics.

The last four workshops will be presumably organised in September 2023. In each region (Karlovy Vary and Ústí), two workshops will be organised for two groups of potential applicants from the private and public sector.

**Each training will consist of four timeslots of 45-60 min: From approximately 9:00 to 11:30 and 12:30 to 15:00, including Q&A and a discussion with participants. 15-20 participants are planned per training.**

### **Organisation of workshops and trainings**

The organisation of the training events will be based on the long-term contractor experience with organising different types of events (e.g., trainings, seminars, workshops, inspiration workshops).

The mailing list will be created in cooperation with local and regional stakeholders and will be presented to MoRD and MoE in advance to allow for amendments and recommendations. The direct mailing will be accompanied by complementary promotion through relevant partner or stakeholder websites and/or newsletters (e.g., LAGs, chambers of commerce, regional authorities etc.). The contractor will draft the invitation for each single event, indicating the place, time schedule, topics and link to the online registration. The registration will be confirmed by email. The registration form will enable the monitoring of the types of registered organisations and thus provide data to help intensify promotion to any underrepresented groups.

After each event (workshop or T-T trainings), each participant will receive the presentations and annexes (including practical examples and links related to the presented topics). The participants will also be asked to fill in a short feedback form to monitor their satisfaction and most required topics.

### **Premises and refreshment**

Where possible, the workshops and trainings will be organised on the premises of cooperating stakeholders (e.g., regional authorities, chambers/business representatives, LAGs, municipalities). For the other events, the contractor will rent a fully equipped presentation room with a minimum capacity of 20 participants. Two coffee breaks will be provisioned during the events through external catering services.

### **Online trainings**

The organisation of online trainings will be based on the 3-year contractor experience with the organisation of webinars, online workshops and discussion. The events will be organised through MS Teams platform or other. The participants will receive simple instructions how to connect to the event. The recommendations and instructions how to organise an on-line event will be also part of the methodology during T-T trainings (including examples and technical specification.) The link to the event will be provided to each participant after the registration.

#### **2.3.4 Deliverable 5: Dissemination of good practices in priority areas for the implementation of the Territorial Just Transition Plans**

The goal of Task 5 is to promote good practices in the priority areas relevant to the TJTP for the three coal regions. This will be mainly carried out through the good practice handbook via a series of regional online and in-person workshops.

Although the related Deliverable 5 is due in Month 13 (autumn 2023), work on the task will begin in early 2023 to allow sufficient time to distil best practices and generate the most value to the output recipients, i.e., the potential **project initiators in the three regions**.

#### **Inception Phase findings:**

#### **Handbook of good practices**

The work on the outputs is expected to be carried out in the following steps:

- First, a **definition of what constitutes good practice** will be developed in the first half of 2023. According to previous methodologies,<sup>25</sup> a key indicator of good practice is replicability. This is expected to be the cornerstone for the selection of good practices. Additionally, other indicators to consider are likely to include the following items: impact/effectiveness of the action, efficiency of the action (the use of public/private financing), sustainability of the action (does the project deliver impacts even after its end and the end of inflow of public finances?), participation and collaboration, and multiplier effects (does the action allow for multiplication of the effects and spill-overs?). The conceptual work will also identify stakeholders and events to collect data and provide a timeline of activities (also see further steps and workshops). This step is expected to evolve throughout the course of the Project. The conceptual approach and pilot examples will be discussed with

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<sup>25</sup> E.g., [https://come-res.eu/fileadmin/user\\_upload/Resources/Deliverables/COME\\_RES\\_Deliverable\\_WP5.1\\_Methodological\\_Framework\\_for\\_good\\_practices.pdf](https://come-res.eu/fileadmin/user_upload/Resources/Deliverables/COME_RES_Deliverable_WP5.1_Methodological_Framework_for_good_practices.pdf) and <https://www.fao.org/capacity-development/resources/good-practices/en/>

representatives of the regions and MoRD to align expectations both for the formal content of the guidebook and the priority areas.

- Second, **good practices will be collected** through desk research, interviews with stakeholders defined in Step 1, in cooperation with the other members of the Project Team and closely following the outcomes of Deliverables 2-4. The good practices will also draw upon insights from the first series of workshops (see below), which are intended to not only provide information but also to solicit further information and feedback for the handbook.
- Generally, the work will aim to **focus, albeit non-exclusively, on small stakeholders** – even though this topic is specifically mentioned as the fourth of the priority areas in the ToR and Project proposal (“participation of small actors”), the Project Team believes that it will weave through the other three priority areas (especially renewable energy and energy poverty) and is particularly important for the success of the just transition process.
- **The good practice examples will be sought in the following order:**
  - The foremost aim of the handbook is to showcase innovative practices and ideas in the Just Transition, which can be successfully replicated in the three coal regions. For this purpose, the team will identify innovative practices that are already potentially available in the three coal regions, as this will bring the highest value added to the target audience. Good practice examples can also be found in other regions in the Czech Republic. In such a case, the team will strive for the highest possible replicability in the coal regions (considering the stakeholders involved, socio-demographic, geographical, technical, and other possible characteristics). This will be further specified within the first phase of this task, i.e., the conceptualisation of the good practices.
  - Importantly, the team will also seek innovative good practices from abroad. In such cases, the replicability in the coal regions is of utmost importance.

**The following points update and expand upon the key topics for good practice. The potential solidification (or expansion) of the topics will be discussed with representatives of the regions and MoRD and can also reflect selected topics stemming from the RIS3 strategies, where relevant.**

**The key topics currently include:**

**a. *Investments in regeneration and decontamination of brownfield sites as well as land restoration, including green infrastructure***

The selection of case studies will focus on two typical areas: the reclamation of areas affected by opencast coal mining and the reclamation of areas affected by industrial activities - the so-called old environmental burdens.

In both instances, the case studies will be defined throughout the Project and are likely to focus on situations that show promising potential in the given areas.

For instance, the case studies on the reclamation of coal mining areas will primarily focus on the use of fast-growing tree crops (or other perennial energy crops) and agroforestry systems combining fast-growing tree crops and conventional agricultural production.

Case studies on brownfield revitalisation will primarily focus on good practice examples with specific remediation technologies such as the use of ozone. In a brownfield, AOP or the application of ozone can be used for controlled and regulated degradation of chemical contaminants (e.g., petroleum, chlorinated degreasers, lubricants, stabilisation of toxic elements). During application, it is necessary to prevent the occurrence of partial oxidation, which often creates even more toxic substances in the water. Another application of ozone can be object remediation, oxidation elimination of microorganisms in masonry, air disinfection in hygienically neglected objects, etc.

Other potential topics can be identified through the discussions and workshops with stakeholders.

**b. *Investments in the deployment of hydrogen and support to innovative solutions in the field of renewable energy and low-carbon hydrogen***

This subgroup will focus on innovative solutions in renewable energy (RES) together with projects developing energy communities. This is a highly relevant topic and previous research has shown that energy communities bring about a number of co-benefits including higher community

cohesion, local employment, among others.<sup>26</sup> The development of energy communities has been high on the European and Czech agenda and although the national transposition is currently lagging, there are pilot cases that are expected to be highly relevant for the coal regions. Other RES projects, such as the development of biogas and biomethane stations, wind energy, and agrivoltaics can be also explored as potential to enhance regional development.

Pilot cases of green hydrogen projects will also be explored, though in this case, relevant cases from abroad may be more relevant.<sup>27</sup> The use of hydrogen is specifically relevant in some sectors (e.g., industry, heavy transport) and less in others (e.g., heating, light transport). This will be acknowledged in the good practice selection.

**c. Measures to tackle energy poverty**

So far, there has not been much focus on energy poverty and vulnerable customers in the Czech energy efficiency programmes (apart from the previous boilers scheme which contained a specific energy poverty component). Therefore, the selection of good practices in this area may be challenging.

Nevertheless, the team expects to base their work, among others, on two recent events: (1) the launch of the New Green Savings Light project. Therefore, the projects within this scheme may be evaluated in coordination with SEF. And (2), a thorough report on energy poverty and its solutions in the Czech Republic has recently been published<sup>28</sup> that contains a number of recommendations as well as some good practices (from abroad) that will be explored. The stakeholders will be included in the interviews.

**d. Participation of small actors (e.g., youth, NGOs, small municipalities, SMEs) to the transition process and project development**

In this section, a total of 10 good practice cases for specific types of small actors will be identified. The identification of examples will follow the same procedure as outlined above and will closely follow the activities included in Task 2 and Task 3, where the interviews carried out with small actors and representatives of national entities and associations, who have a good overview of what suitable activities have been already implemented on the ground and which types of innovative national activities and activities from abroad could serve as inspiration for other entities in coal regions. Thematically, good practice cases will be divided into three groups of actors: (1) SMEs (e.g., cultural and creative industries, start-ups, digital vouchers, and the general segment of SMEs), (2) municipalities (preparation of projects in the public sector), and (3) schools/universities/ NGOs.

The handbook will contain good practice case studies (30 case studies, 1 page each), additionally, the handbook will contain short information about the potential sources of funding and available support to the project development. In total, the handbook will not exceed 40 pages. **With the help of a professional graphic designer, the handbook will be made user-friendly and highly visual** (while retaining the information value) to serve the target audience (project developers from various sectors and fields in the three regions).

**Workshops**

There are two rounds of workshops envisaged for Task 5. In both rounds, one workshop per region is planned. The first round will be carried out online and the second round will be carried out on-site. The conceptual approach to the workshops and timeline will first be discussed with MoRD and the regions, as envisaged above.

- The **first series of workshops** will be held online and is expected to be organised at the beginning of the planned schedule of Task 5 (**spring/early summer 2023**). The aim of these workshops is to present the approach to good practice case study selection, to highlight some examples of good practices, and, most importantly, to receive feedback on the approach, the pre-selected case studies, and gain knowledge on additional potential examples from the regions and elsewhere. This first workshops are therefore expected to be a discussion rather than the one-way provision of information.

<sup>26</sup> <https://ekonom.fel.cvut.cz/cs/katedra/lide/valenmi7/theta/v3-mnohostranne-efekty-full-2022-11-24-final.pdf>

<sup>27</sup> <https://www.hytep.cz/en/>

<sup>28</sup> <https://hnutiduha.cz/publikace/energeticka-chudoba-jeji-reseni>

- The **second series of workshops** will be held on-site in the three regions and will present and disseminate the handbook. Where possible, the team strives to invite the project promoters of the selected case studies to the workshops to present the projects and provide higher visibility to the handbook. The workshops are scheduled for **autumn 2023** towards the end of Task 5.

All workshops will be prepared and advertised in advance to ensure that the relevant audience is present. The agenda will be circulated in advance. Short notes with the key findings and conclusions will be prepared after each workshop in the first series to serve as a background for adaptation of the case studies and handbook. The minutes of the second series of workshops will be summed up in the Final Report.

As the Project expects several stakeholder engagements and events, the Project Team will coordinate the planning of the events and their content to create synergies, rather than overwhelm the potential target audience. This will also help to avoid doublings and/or overlaps both timewise and content-wise.

### 2.3.5 Deliverable 6: Recommendations for the transfer of good practices on regional development and innovation from Moravia-Silesia to the Karlovy Vary and Ústí regions

**The aim of Task 6** is to prepare a report analysing the experience of the Moravian-Silesian region in supporting regional development, businesses and innovation through specific organisational structures and processes, and presenting recommendations for the development of similar measures in the regions of Karlovy Vary and Ústí.

Key activities include:

- Desk research and interview of relevant stakeholders from the three regions;
- Draft the report, present it to the Steering Committee, integrate the comments;
- Organise and hold workshop(s) to present the reports and obtain stakeholders' feedback; and,
- Present the Final Report to SC including all comments.

**Inception Phase findings:** The transfer of knowledge from the Moravian-Silesian region to Karlovy Vary and Ústí regions is already under way. For example, the Moravian-Silesian Innovation Centre (MSIC) has already shared their experience in business support. An in-depth analysis of needs and expectations in Severozapad will be investigated to setup efficient workshops and facilitate further cooperation. Particularly MSIC, Moravian-Silesian Investment and Development (MSID), Moravian-Silesian Energy Centre (MEC) and MS Tourism, eventually Kreativni Akademie and/or selected schools and NGOs will be involved in the transfer. A hybrid (personal + online) format is expected for the two workshops. The timing of the workshops will be discussed and adapted to regional needs (e.g., in relation to the Permanent Regional Conference events).

**Task 6 will first focus on desk research and analysis** of the experience of the Moravian-Silesian region in regional development, businesses and innovation through organisational structures and processes, as well as interviews with stakeholders from all three regions to present recommendations for the improvement of existing support structures in the regions of Ústí and Karlovy Vary. Key questions ask the following: What can be improved? What is missing in the current structure? We will consider the findings from Deliverables 1-5 that capture the key experiences of the Moravian-Silesian region, which would be appropriate to transfer to Ústí and Karlovy Vary. These items will be continuously discussed and identified. Updates on the ongoing activities of the knowledge transfer from Moravian-Silesian to Karlovy Vary and Ústí will be considered, establishing an open channel between the Team Leader and the three regions from the start of the implementation phase (February/March 2023). This will ensure a realistic status quo when implementing the task later in the year and will also help to identify potential questions before the start of the Task 6. In Task 6, the role of the MS region will be crucial for the collaboration with the Project Team. We expect maximum support from the European Commission and MoRD / MoE to ensure the Project Team's collaboration with the MS region as well.

In the initial phase, 16 interviews from the three regions will be conducted: the Project Team expects to conduct eight interviews in the Moravian-Silesian region (identification of specific parameters and conditions for the implementation of good practice), as well as four interviews in Karlovy Vary and four interviews in Ústí. Possible conditions for the application of good practice, modifications to specific regional specifics of the Karlovy Vary and Ústí regions will also be discussed.

Emerging from the Project proposal and the first discussions within the kick-off meeting, good practices will mainly have an institutional and procedural character. In this sense, the Project Team will request more detailed information on the organisational structure, funding and capacity building. A key aspect highlighted within the research will be the transferability of good practices.

Advantages of using the Moravian-Silesian region as the basis from a capacity-building perspective relate to several factors, such as the operation of regionally supported executive agencies (such as Moravian-Silesian Innovation Centre, Regional development agency, MS Pact, Moravian-Silesian Energy Centre, Moravian-Silesian Tourism and several private development organisations), widespread, functional and effective regional cooperation, existing capacity from former Regional Operation Programme (ROP) Moravia-Silesia Managing Authority, political stability and continuous public administration capacity building, experienced strategic project leaders, developing innovation potential with national and European significance (e.g., European Center of Excellence - IT4Innovations, three regional universities), long-term technical and digital skills ecosystem.

Based on the results of the research, questions and topics for semi-structured stakeholder interviews will be prepared and provided to MoRD so that they can provide feedback and agree on the final set of questions. The list of interviewees will have already been prepared with feedback from MoRD during Task 4 and Task 5 (roughly in the first half of November 2023). Interviews will be held on site or online to provide more flexibility.

The interviews will be analysed and the key findings will be summarised in an interview report, which shall be part of D6. This part of Task 6 will be presented and discussed within the Steering Committee meeting, while the main comments will be incorporated into the final output for the regional workshops.

**The implementation phase of Task 6 will verify the specific conditions** for the application of good practice in the Ústí and Karlovy Vary regions **through two stakeholder workshops** (one in Ústí and one in Karlovy Vary). These workshops will be important because a "one size does not fit all" philosophy generally applies in this context. Therefore, emphasis will be placed on fine-tuning the specific details of good practice from the perspective of their potential for application. Workshop participants will be asked to provide their feedback through online questionnaires, which will be disseminated with the presentations and annexes after the workshop.

We will focus on presenting the findings of the revised Draft Report (after comments from the Steering Committee above), obtaining feedback and discussing stakeholder comments. Our approach would be to share the presentation (agreed with the Steering Committee) with the stakeholders about the revised Draft Report. After the workshop, time will be given to send additional comments. The obtained feedback will be processed and incorporated into the final version of the deliverable.

**The last step of Task 6 will be to finalise and present the report.** As an outcome and D6, the report will be completed by incorporating feedback from the workshops and presenting the final version to the Steering Committee. The report will provide information about the practical implementation of the good practices from the Moravian-Silesian region into agencies for the other two regions (D6).

### 2.3.6 [Deliverable 7: Final Report](#)

**Inception Phase findings:** None.

The **organisation of the final event** will present the work to an extended audience. Coordinating important topics together with MoRD, MoE and other stakeholders is very important and should be started with ample anticipation (at least 4 months). We will set-up the event in coordination with DG REFORM, DG REGIO and the two core ministries. This includes:

- Setting the date and venue.
- Advertising through the appropriate channels well in advance to ensure the desired attendance to the event.
- Ensuring that the **preparation of the event materials** (e.g., agenda, proposed list of participants, technical presentations, booklets, exercises, publications) are based on the attendees' expectations. For this reason, the workshop will be held in English, with translation into Czech.
- The Czech counterparties will make available and ensure adequate premises (i.e., in terms of size and equipment assuming that audio-equipment is included); however, the service provider will monitor the set-up of the specific venue for the workshop.

- Ensuring all logistics (in addition to the venue) related to event organisation (e.g., media and catering).
- Setting-up an after-event care system, which posts event materials as well as any information/documentation provided online or by email.

The Final Report will include a brief summary of the activities undertaken during the Project, including all meetings and consultation activities with stakeholders, as well as a brief analysis of the Project monitoring indicators presented in this Inception Report. The focus will be on recommendations for the Czech authorities that could facilitate and complement the implementation of the Project's results, increase the Project's impact and contribute to the success of the just transition process in the country. The recommendations will be also made available in local language to facilitate the local authorities in its application. The Final Report will also include recommendations for the DG REFORM and the Czech authorities that could be used in similar projects in the future. These will focus on the lessons learnt from Project implementation and management or on topics such as absorption of public funding.

### 2.3.7 Others

**Inception Report findings:** As mentioned in the kick-off meeting, synergies with other TSI projects (e.g., Support to National Promotional Bank for Pillar 2 under JTM) and analysis of potential overlaps are desirable. At the same time, a flexible project management approach in relation to the development of the various tasks is welcome to ensure coherence with the timing of relevant activities under the national Just Transition Programme, which could benefit from preparing and reviewing documents within the current assignment (e.g., call for proposals approved by the Managing Authority for the first thematic groups of projects with a deadline expected in March 2023 to be aligned with activities under Task 3).

## 2.4 Recommendations for the Implementation of the Project

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### Deliverable 1: Inception Report

As the results from Deliverables 2 and 3 are already expected in early 2023 (in parallel with the preparation and submission of the final version of the Inception Report), we gently request feedback within two weeks (instead of the 30 days as per terms of reference) to reflect stakeholder views on the upcoming deliverables.

### Deliverable 2: Report on lessons learnt and recommendations

There are **several activities that need to be coordinated with the MoRD and MoE** and we need a quick feedback to implement the activities as planned. The activities refer to:

- a) Receiving access to the latest information on the project pipelines that already exist within each of the three coal regions and the contact to project promoters focusing on the small projects as soon as possible.
- b) Discussion of the main structure of questions for guided interviews already finished;
- c) Implementation of at least 60 guided interviews, which will take place until mid-March 2023 and may require collaboration from MoRD; and,
- d) Receiving the PJT Communication Plan 2023.

For this task, it will be important to receive **objective insight into unsuccessful (unsupported in the past) projects** to extract the lessons learnt. This requires delicate handling of confidential information and it is recommended to anonymise the project stakeholders and to focus on the thematic and procedural issues.

**Evaluations regarding the use of financial resources** from the 2014-2020 period **until the end of 2023**, which is outside the timeline of the dates for Deliverable 2 but is recommended to be updated in the Final Report (Deliverable 7). The ex-post evaluation for the 2014-2020 period is only available for the Moravian-Silesian region.

**Materials for the stakeholder interviews:** In addition to the semi-structured interview guides, it may also be useful to have a couple of slides about the Project and the PJT goals as an introduction for aligning stakeholders.

**Task 2 (and all other tasks) require increased stakeholder interaction:** For interviews and workshops that will not only be brought into line with the PJT Communication Plan for 2023, which will



create a synergy of this TA Project with the necessary support for raising the awareness of potential applicants about the possibilities of PJT.

#### Deliverable 3: Review of call documentation

There are **several activities that need to be coordinated with MoRD, MoE and the three regions** where we need feedback to implement the activities as planned. These refer to:

- e) Clarification about the exact parameters of MoE Calls and the requirements for beneficiaries, i.e., regional authorities early 2023.
- f) The same applies to the wording of calls prepared by regions themselves for final beneficiaries (e.g., SMEs, municipalities, NGOs, etc.).
- g) Time schedule and details of next planned PJT calls of proposals (by months)

Work on Task 3 is expected **to start as soon as possible in 2023** by reviewing existing documentation of groups of projects schemes prepared by regional authorities in the Ústí and Karlovy Vary regions.

We recommend prioritising the review of groups of projects schemes and providing recommendations for improvement **based on the planned time schedule for calls for proposals prepared by MoE**.

Review and recommendations could be **provided in two rounds**:

1. A first review of templates and guidelines for applications prepared by regions and partial recommendations for groups of projects schemes that should be prepared and submitted by regional authorities in **Q1/2023**, i.e., support for business (start-ups, innovation vouchers and digital vouchers) in both regions and support for creative industries (SMEs from the film sector) in the Ústí region.
2. At second review and recommendations for other groups of projects with expected submission in **Q2/2023 and Q3/2023** could be provided, i.e., vouchers for public sector (support of human resources in schools and creative vouchers) and support for the preparation of public sector projects.

We expect to review approximately 10 collective documents<sup>29</sup> for both regions.

We think it would be important to discuss on **how to motivate final beneficiaries to adhere to the goals of the groups of small project schemes under the PJT**. All obligations for recipients of support from EU funds will apply to the regional authorities, which are accountable to the MoE for grant implementation. However, regional public authorities design their own administration of small grants for final beneficiaries.

#### Deliverable 4: Trainings

The same information request applies for the implementation of the trainings:

- h) Once the trainings start in April 2023, the trainers should receive a **rough estimation of PJT call deadlines** (month) to provide potential applicants with in-time information.
- i) The **time schedule and contents of other PJT information events** to avoid duplicate presentations and to coordinate the cooperation, maximising the impact to beneficiaries.

Moreover, coordinating with stakeholders to identify participants for the trainings will start in February 2023 and continue thereafter. The same applies for the experienced trainer of trainer candidates with March/April 2023 as start.

The accumulation of events, interviews and workshops with the risk that there are not enough participants or less motivated ones is very sensitive for the implementation of the trainings. Thus, the Project Team will develop some horizontal activities relate to **management and communication to stakeholders, coordination and calendarization of different events and activities as the visibility to have a unique Project identify (for invitations, registrations, materials and online platforms)**.

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<sup>29</sup> Estimating group of project calls for: 1. start-ups, 2. innovation vouchers, 3. digital vouchers, 4. vouchers for film SMEs (UK); 5-8. vouchers for public sector (KVK + UK); creative vouchers, recruitment of teachers/academics; 9-10. vouchers for a preparation of public sector projects (KVK+UK) etc.

*Deliverable 5: Handbook of good practices*

For the implementation of Task 5, the Project Team **recommends starting early and coordinating and following-up with other Tasks**. More specifically, the Project Team will strive to conceptualise the methodology for the selection of case studies ahead of the actual timing of this Deliverable in the Project to be able to make use of the activities, events, and knowledge gathered in Deliverables 2-4.

As to the selection of case studies, innovative and inspiring cases will be sought both from the Czech Republic and from abroad.

The **interviews and workshops need to be coordinated** with the other team members and their respective activities, and also with the relevant stakeholders and their scheduled events (Regional authorities, SEF, MoE, MoRD).

*Deliverable 6: Transfer of good practices from Moravian-Silesian region to Karlovarsky and Ustecky regions*

As the transfer from Moravian-Silesian to Karlovarsky and Ustecky regions is already active, it is important that the update will already be accessible by the Project Team. This could be done by **establishing an open channel from the start of the implementation phase (January 2023)** between the Team Leader and **the three regions**. This will ensure a realistic status quo when implementing the task later in the year and also help to identify potential questions before the start of the Task 6.

The **interviews and workshops need to be coordinated** with the other team members and their respective activities, and also with the relevant stakeholders and their scheduled events (Regional authorities, SEF, MoE, MoRD).

*Deliverable 7: Final Report*

For the Final Report, there will be an update on the current socio-economic situation along with any additional updates as identified above or throughout the Project implementation.