



**European Commission**  
Enterprise & Industry Directorate General

## **CALL FOR PROPOSALS**

### **Facilitating Transnational Low Season Exchanges in Europe through the Development of Social Tourism**

**40/G/ENT/CIP/12/B/N/02S03**

## **GRANT PROGRAMME 2012**

The present call for proposals is composed of a set of Grant Submission Documents, which form an integral part of this call:

The call for proposals,  
The Guide for Applicants,  
EPSS Submission Forms

The terms set out in the call for proposals document shall take precedence over those in the other parts of the Grant Submission Documents.

## TABLE OF CONTENTS

1.	CONTEXT.....	3
	• Production of Communications Material. These included the creation of a logo, the production of lamas, two promotional leaflets and two video clips.....	3
2.	OBJECTIVE OF THE CALL.....	7
3.	TIMETABLE.....	10
4.	EU FINANCING.....	11
	4.1. CO-FINANCING AND JOINT AND SEVERAL RESPONSIBILITY .....	11
	4.2. SUBCONTRACTING .....	11
	4.3. PAYMENT ARRANGEMENTS .....	12
5.	ELIGIBILITY .....	13
	5.1. GEOGRAPHICAL ELIGIBILITY .....	13
	5.2. LEGAL STATUS ELIGIBILITY .....	13
	5.3. EXCLUSION CRITERIA .....	15
	5.4. ELIGIBLE PROPOSALS.....	15
6.	SELECTION .....	16
	6.1. APPLICANTS' FINANCIAL CAPACITY TO COMPLETE THE PROPOSED ACTION .....	16
	6.2. EXTERNAL AUDIT REPORTS.....	16
	6.3. APPLICANTS' OPERATIONAL CAPACITY TO COMPLETE THE PROPOSED ACTION .....	16
7.	AWARD.....	17
8.	SUBMISSION OF PROPOSALS.....	18
9.	CONTACTS.....	19
10.	ANNEXES.....	19
11.	EVALUATION CRITERIA.....	20

**INTERESTED PARTIES ARE INVITED TO READ CAREFULLY THE BELOW INSTRUCTIONS, AND TO USE THE QUESTIONNAIRE PROVIDED IN CHAPTER II OF THE GUIDE FOR SUBMISSION IN ORDER TO ENSURE THAT APPLICATIONS ARE COMPLETE WHEN SUBMITTED.**

## **1. CONTEXT**

### **1.1 Background and CALYPSO Work Programme**

Society is facing major changes and economic challenges. The advent of new family structures, the emergence of single-person households, increased life expectancy, financial constraints, employment issues, additional free time and population ageing in general are all factors profoundly altering the tourism environment. Ensuring universal access to holidays means, at Union level, taking account of the specific features of the European society.

The European Union must therefore equip itself to realise that objective. It is within this context that on the initiative of the European Parliament, the Budget Authority voted in favour of the preparatory action "Social Tourism in Europe"<sup>1</sup> in 2008. The preparatory action was launched thereafter in 2009 under the name **CALYPSO**, with a one million euro (EUR 1,000,000) budget allocated for 2009 and the same amount confirmed for 2010. The budget was increased to 1.5 million euro in 2011, the last year of the three-year Preparatory Action.

Nevertheless, in view of the success and take up of the initiatives undertaken to date, a decision was taken to seek additional possible avenues to finance Calypso related projects in 2012 too. A budget of Euro 450,000 has thus been secured through the Entrepreneurship and Innovation Programme (EIP) for this current Call for Proposals on transnational low season exchanges.

CALYPSO seeks to facilitate trans-national exchanges in the tourist low season for specific disadvantaged target groups (Seniors, Youths, People with Disability, Families with low income). It **encourages – through the social policy function of tourism - as many people as possible to go on holiday within a country different from the one of residence/origin** and therefore significantly aids mobility. Moreover, tourism exchanges of this kind also contribute to:

- **promote regional development and generate economic growth across Europe;**
- **improve tourism seasonality patterns across Europe**
- **create more and better jobs in the tourism sector**
- **increase the European citizenship**

More information on CALYPSO may be found by following this link:  
[http://ec.europa.eu/enterprise/sectors/tourism/CALYPSO/index\\_en.htm](http://ec.europa.eu/enterprise/sectors/tourism/CALYPSO/index_en.htm)

The CALYPSO Work Programme to date (2009-2011) has consisted in:

- Consultation with Stakeholders
- Setting Up of an Expert Group to assist in the implementation of the Preparatory Action.
- Visibility Meetings Across Europe. Nine meetings were held to date, in different parts of Europe (Poland, Belgium, Romania, Italy, France, Spain, Finland and Portugal).
- Production of Communications Material. These included the creation of a logo, the production of lamas, two promotional leaflets and two video clips.

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<sup>1</sup> Preparatory action within the meaning of Article 49(6) of Council Regulation (EC, Euratom) No 1605/2002 of 25 June 2002 on the Financial Regulation applicable to the general budget of the European Communities (OJ L 248, 16.9.2002, p. 1), as last amended by Regulation (EC, Euratom) No 1525/2007 (OJ L 343, 27.12.07, p. 9).

- A Call for Tenders for the CALYPSO Study “**Tourism exchanges in Europe: Enhancing employment, extending the seasonality spread, strengthening European citizenship and improving regional/local economies through the development of social tourism**” which was issued by the European Commission in Spring 2009. The Study was thereafter finalised in July 2010, with the participation of 21 countries. One of the main study tasks was to propose one or several mechanisms enabling particular target groups to go on holiday in the tourist low season, in other countries, on the basis of offers coordinated by public authorities but including initiatives by different stakeholders (like municipalities, charitable organisations, parishes, unions, social partners, cooperatives or any not-for-profit association, amongst others).

Good practices were eventually identified, some going beyond national confines and dealing with exchanges between different countries, whilst mechanisms were also proposed to facilitate low season tourism exchanges across Europe. The CALYPSO Study also indicates that a selection of indicators concerning environmental, socio-cultural, Corporate Social Responsibility, qualitative and economic performance could be developed into specific criteria when promoting Calypso tourism exchanges at national/regional level. Additional information can be found towards the end of Section 5 of the CALYPSO Study ([http://ec.europa.eu/enterprise/sectors/tourism/files/docs/calypso/calypso\\_study\\_annexes\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/docs/calypso/calypso_study_annexes_en.pdf)).

- In conformity with the Calypso Study recommendations, a Call for Proposals (“**Facilitating Transnational Low Season Exchanges in Europe through the Development of Social Tourism**”) was launched in July 2010, seeking to support tourism-related public authorities in strengthening internal structures, to be able to undertake trans-national low season exchanges in the Calypso target groups. Four winning proposals were eventually selected, with the projects commencing on the 1<sup>st</sup> March 2011.

A similar Call for Proposals was launched by the European Commission in 2011, to sustain networks of European public authorities seeking to facilitate trans - national tourist exchanges in the CALYPSO target groups. Three winning proposals were eventually selected, with the projects commencing on the 1<sup>st</sup> January 2012.

- An additional Call for Proposals “**Promoting Social Tourism in Europe through the Development of a Demand – Supply Web Based Platform**” was launched in 2011, as a means to facilitate affordable tourism exchanges. This platform was listed as one of the main recommendations in the CALYPSO study finalised in July 2010. A proposal has been selected for the award of a grant and the project started in April 2012. More information concerning this project may be found by following this link [http://ec.europa.eu/enterprise/sectors/tourism/files/calypso/2012-project-summaries/steep\\_final\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/calypso/2012-project-summaries/steep_final_en.pdf).

Additional details on the Work Programme – including the Study and the 2010 Call for Proposals - may be found by following the above-indicated CALYPSO link.

## 1.2 The European Policy Framework

Tourism is an economic activity capable of generating growth and employment in the EU, while contributing to development and economic and social integration, particularly of rural and mountain areas, coastal regions and islands, outlying and outermost regions or those undergoing convergence. With some 1.8 million businesses, primarily SMEs, employing approximately 5.2 % of the total workforce (approximately 9.7 million jobs, with a significant proportion of young people), the European tourism industry generates over 5% of EU GDP, a figure which is steadily rising. Tourism therefore represents the third largest socioeconomic activity in the EU after the trade and distribution and construction sectors. Taking into account the sectors linked to it, tourism's contribution to GDP is even greater; it is estimated to generate over 10 % of the European Union's GDP and provide approximately 12% of all jobs. In this regard, observing the trend over the last ten years, growth in employment in the tourism sector has almost always been more pronounced than in the rest of the economy<sup>2</sup>.

<sup>2</sup> COM(2010) 352 final – 30.06.2010

[http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010_en.pdf)

The main working framework for this initiative is the following:

– **Article 2 of the Treaty establishing the European Community**, which calls for a high level of employment, the raising of the standard of living and quality of life as well as economic and social cohesion and solidarity among Member States. The need to strengthen the protection of the rights and interests of Member State nationals, through the introduction of a citizenship of the Union, is also raised. Additionally, **Article 3** stipulates that “*for the purposes set out in Article 2, the activities of the Community shall include, as provided in this Treaty and in accordance with the timetable set out therein [...] measures in the spheres of energy, civil protection and tourism*”.

- the Communication “**Agenda for a sustainable and competitive European tourism**”<sup>3</sup> that followed the previous Communication “**A renewed tourism EU policy: Towards a stronger partnership for European Tourism**”<sup>4</sup>. The 2007 Communication represents the official launching and endorsement of a medium-long term Agenda in which all tourism stakeholders should undertake the necessary steps to strengthen the contribution of sustainable practices to facilitate competitiveness. It focuses on mobilising actors to aim for responsible tourism by producing and sharing knowledge, whilst seeking to increase awareness on the available financial instruments which could help to put the knowledge into practice. Two of the challenges identified in the Communication, namely, tourism for all and reducing the seasonality of demand, are directly relevant to the context of this preparatory action.

- the “**Treaty of Lisbon**” which entered into force on 1st December 2009, allowing the Commission to undertake necessary measures in order to complement the action of the Member States in the tourism sector. Article 6(d) mentions tourism as one of the areas in which “the Union shall have competence to carry out actions to support, coordinate or supplement the actions of the Member States”. Promoting the competitiveness of Union undertakings also features within the Treaty, (Title XXII Tourism, Art. 195 TFEU), with specific measures concerning the tourism sector especially aimed at:

- (a) encouraging the creation of a favourable environment for the development of undertakings in this sector;
- (b) promoting cooperation between the Member States, particularly by the exchange of good practice.

- the Communication “**Europe 2020: A Strategy for Smart, Sustainable and Inclusive Growth**”<sup>5</sup>, which sets out a vision of Europe's social market economy for the 21st century. It shows how the EU can come out stronger from the crisis and how it can be turned into a smart, sustainable and inclusive economy delivering high levels of employment, productivity and social cohesion. To deliver rapid and lasting results, stronger economic governance will be required. Enhancing the competitiveness of the European tourism sector is mentioned specifically in the Strategy.

- the Communication “**Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe**”<sup>6</sup>. To keep Europe the world's top tourist destination, the Commission communication proposes 21 actions grouped under the headings:

- a) Stimulate competitiveness in the European tourism sector;
- b) Promote the development of sustainable, responsible and high-quality tourism;
- c) Consolidate the image and profile of Europe as a set of sustainable and high quality destinations;
- d) Strengthen the integration of tourism in the EU policies and financial instruments.

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<sup>3</sup> COM(2007) 621 final - 19.10.2007

[http://ec.europa.eu/enterprise/tourism/docs/communications/com2007\\_062101\\_en.pdf](http://ec.europa.eu/enterprise/tourism/docs/communications/com2007_062101_en.pdf)

<sup>4</sup> COM(2006) 134 final -17.03.2006

[http://ec.europa.eu/enterprise/tourism/docs/communications/com2006\\_013401\\_en.pdf](http://ec.europa.eu/enterprise/tourism/docs/communications/com2006_013401_en.pdf)

<sup>5</sup> COM (2010) 2020 – 03.03.2010

<http://ec.europa.eu/eu2020/pdf/COMPLET%20EN%20BARROSO%20%20%20007%20-%20Europe%202020%20-%20EN%20version.pdf>

<sup>6</sup> COM(2010) 352 final – 30.06.2010

[http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010_en.pdf)

“CALYPSO” is specifically mentioned under the first heading, which also identifies a tourism exchange mechanism between Member States in the same CALYPSO target groups as being one of the actions to be implemented (Action 6).

Focused initiatives in tourism are therefore the proof that economic and employment opportunities, key goals within the Lisbon strategy, can indeed be generated by increasing tourism accessibility for additional strata of the European population. By facilitating access to tourism for society groups for which going on holiday represents a difficult or even impossible undertaking, such forms of tourism strengthen the tourism industry's revenue generation potential. They enable off-season visits to be developed, particularly in regions where tourism is well developed but highly seasonal, whilst also giving the opportunity to relatively unknown, small or emerging destinations to promote their offer amongst a wider spectrum of the European population. Accordingly, such tourism exchanges encourage the creation of longer-lasting employment opportunities in the tourism sector by making it possible to extend such jobs beyond the respective peak season.

## 2. OBJECTIVE OF THE CALL

The overall objective of this call for proposals is to support tourism-related public authorities to team up with private stakeholders - corresponding to the definitions elaborated upon in Section 5.2 - to be able to undertake in the forthcoming future trans-national low season exchanges in the CALYPSO target groups.

### 2.1 Specific Objectives

In this perspective, the **specific objectives** are:

#### **(a) To Support Public-Private Partnerships in Setting Up, Developing and/or Strengthening CALYPSO structures in specific countries.**

Following the CALYPSO Study ([http://ec.europa.eu/enterprise/sectors/tourism/calypso/2010/index\\_en.htm](http://ec.europa.eu/enterprise/sectors/tourism/calypso/2010/index_en.htm)), many Member States requested the European Commission to assist them further in order to ensure an adequate follow up of the CALYPSO action. The Country Profiles within the Study indicate varying levels of existing involvement by Member States, with some already having resources actively promoting such exchanges and others lagging behind. As part of the ongoing dialogue through the Calypso Visibility Meetings Across Europe, private sector stakeholders also expressed their interest to participate directly in setting up transnational structures and exchanges.

Through the first two Calls for Proposals in 2010 and 2011, seven projects were co-financed with the participation of national or regional public authorities from 14 different European countries spread all across Europe. It is now felt that the time is ripe for the private sector to be more closely involved since appropriate Public-Private Partnerships could generate different initiatives within this field, with possibly more emphasis on market-driven, innovative and competitive solutions that could also benefit the European tourism industry and SME sector.

Through this current Call, specific measures may therefore be proposed to give value added by facilitating public and private stakeholder collaboration. Private stakeholders could contribute through their expertise in assisting public authorities to:

- § investigate and analyse which are the best ways and means to set up the necessary structures at national and/or regional level.
- § build upon their existing set-ups by strengthening administrative functions to engage in, promote and monitor such activities.

#### **(b) To provide networking opportunities enhancing collaboration between public authorities and private stakeholders, in order to promote low season trans national exchanges in any (one or more) of the four CALYPSO target groups (Seniors, Youths, People with Disability, Families with low income).**

The very notion of effecting low season exchanges naturally implies the crucial need to collaborate with other public authorities and private sector stakeholders in identifying appropriate means of cooperation. Whilst an initial challenge would be, where applicable, to develop internal structures at national level, the next step would be to examine ways and means to work together with other countries and foreign stakeholders in identifying:

- § target groups and exchange periods of common interest;
- § exact forms/mechanisms for cooperation (such as symmetrical/balanced or asymmetrical/uneven exchanges, bilateral or multilateral exchanges) to effect low season exchanges in any (one or more) of the four CALYPSO target groups and/or
- § whether existing structures (administrative set-ups) and good practices in certain countries are transferrable (fully or partly) to others, thus facilitating the potential of such countries to engage in exchanges due to compatible models within their respective structures.

The co-financing of meetings and/or conferences would be permissible and is aimed at assisting the different partners to reach such objectives, on the condition that such actions are targeted towards finding practical solutions to undertake exchanges in the low season.

**(c) To illustrate how specific project deliverables could be linked to the use of the Calypso web platform, as a means to facilitate the continuation of projects beyond the co-financing period.**

As indicated in Section 1.1, a proposal has been selected for the award of a grant concerning the creation of a web based Demand - Support platform. The project started in April 2012, and it is expected that the actual platform will be implemented around Spring 2013.

The platform is intended as a means to facilitate affordable tourism exchanges, whilst permitting the sharing of information and raising visibility/creating awareness on concrete offers and initiatives. Through the platform, carefully vetted supply side stakeholders like hotels or holiday villages could interact with demand side stakeholders like public authorities, parishes and/or NGO's to enhance travel opportunities particularly in the low season. The full specifications concerning the web platform Call for Proposals are available by following this link:

[http://ec.europa.eu/enterprise/newsroom/cf/itemlongdetail.cfm?item\\_id=5337](http://ec.europa.eu/enterprise/newsroom/cf/itemlongdetail.cfm?item_id=5337)

Additional details on the web platform project, including project partners and contact details, may be found by following this link:

[http://ec.europa.eu/enterprise/sectors/tourism/files/calypso/2012-project-summaries/steep\\_final\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/calypso/2012-project-summaries/steep_final_en.pdf)

This web platform can therefore be an additional tool – amongst other mechanisms to be investigated by the successful bidder/s - in facilitating the continuation of Calypso projects (those that are successful following this Call for Proposals) beyond the co-financing period. Within the framework of this Call, partners are in this regard requested to present a proposal that:

- § is conceptual, in view of the fact that the platform still needs to be implemented;
- § indicates how specific project deliverables could make use of this platform mechanism (and others, where applicable) to promote concrete tourism exchanges in the forthcoming future. Particular emphasis should be placed on how the project deliverables could benefit from the web platform's supply-demand notion;
- § enables them to think beyond the project life, the platform being an added tool that could enhance the potential growth of their proposed Calypso project in years to come.

**(d) To conduct relevant studies that could improve the knowledge base and eventually facilitate low season exchanges.**

Throughout past Calypso Calls for Proposals, the European Commission has co-financed relevant studies as a means to strengthen the knowledge base, leading on to the implementation of trans-national low-season schemes. It is now felt that concrete initiatives such as those possible through the Specific Objectives "a", "b" and "c" described above should be given more importance than the need to conduct additional studies, in view of the availability of relevant studies and good practices that are now well documented.

Nevertheless, it is acknowledged that specific studies might still be needed, particularly as regards those national and regional stakeholders that have still to participate, to date, in such Calypso projects. Such studies could include:

- § how best to implement structures at national and/or regional level;

Reference to the CALYPSO Study Country Profiles would be appropriate in view of the fact that structures and set ups are likely to differ in each country.

- § how best to collaborate with the other partners in developing low season exchanges
- § how to integrate the participating private stakeholders within any eventual transnational exchange schemes.

This should include the identification of specific exchange mechanisms, notably setting up and testing the operational framework/functionality of proposed exchange projects between the different partners. Feasibility studies, cost benefit analysis of concrete proposals, studies on legislative compatibilities, exchange of information on school holiday patterns, and support to planning/coordination could all be useful tools. Costs relating to the financing of travel/accommodation arrangements for holidaymakers are however not eligible for co-financing, within this call for proposals.

- § what type of incentives could be proposed by the partners to demand and/or supply stakeholders (as applicable) in their own territory to ensure a selective and appropriate participation within CALYPSO

Incentives (ex. fiscal, subsidised bank loans for targeted purposes, subsidies linked to income thresholds, grants for product improvements) could be useful in strengthening the competitiveness and sustainability of supply-side SME's (the CALYPSO Study emphasises that different stakeholders, in particular from industry, specify that CALYPSO should benefit the SME sector in tourism and not just the major suppliers). Such initiatives could also facilitate the integration of SME's and other stakeholders in the web platform as described above (point "c"). Legislation such as that relating to distortion of competition should naturally be safeguarded.

- § what type of country-specific criteria to develop to ensure targeted participation in eventual exchanges.

The development of transparent, specific criteria (ex. sustainability, accessibility and income thresholds) by public and private sector partners would facilitate targeted participation in CALYPSO. The selected criteria could place an emphasis on fair employment conditions and social values (ex. stressing the "tourism for all" concept by identifying appropriately targeted social brackets at national/regional level through the development of appropriate criteria), thus supporting citizens with lower socio-economic profiles. As also highlighted in the CALYPSO Study however, a social mix should nevertheless be encouraged since such an action should not be perceived or branded as one concerning tourism for the poor. Such criteria would be relevant with immediate effect (vis-à-vis this Call by facilitating targeted participation on both the demand and supply sides) but also within the context of the web platform (as described above).

## 2.2 Specific Requirements

To answer the requirements of the present call, partners are requested to present a proposal that clearly elaborates upon the project objectives and that gives a detailed description of activities and of expected results. The scheme should be such that the project is realised in an effective manner, giving due importance to the Call objectives. In order to ensure that the Calypso objectives are adhered to :

- activities in objective "a)" are compulsory and should necessarily be accompanied by activities in either "b)" or "c)" (or preferably both)

- activities in objective "d)" are not to be prioritised, particularly by those stakeholders that are already benefitting from Calypso co-financing. They can be proposed by all partners, including those already participating in previous Calls, but will be regarded as value added only when expressly needed by stakeholders that to date have not yet participated in Calypso projects. These activities will be allowed only if included within the following proposal objective packages :

"a)" + "b)"  
"a)" + "c)"  
"a)" + "b)" + "c)"

Overall, the European Commission will expect partners to undertake activities aiming for practical and tangible – rather than theoretical – results.

The onus will be on the partners to list as part of their proposal which methodologies, support tasks and actions are likely to be the most relevant for them in order to develop and implement the proposed deliverables accordingly. It should also be clearly stated in the submitted proposal which one (or more) of the four CALYPSO target groups is being elaborated upon.

Beneficiaries should amongst others make provision for relevant travel and subsistence expenses in their budgetary breakdown, vis-à-vis a kick off meeting between the European Commission and successful candidates to be held in Brussels in the first month following the signature of the agreement

Beneficiaries should also submit a monitoring/implementation report of not more than 10 pages to the Commission (at the end of Month 5 of the project) besides a comprehensive "Final Implementation Report" (40 pages maximum), describing the practical work undertaken and the tangible results achieved.

### 3. TIMETABLE

- (1) Scheduled start-up date for the action: *October – November 2012*
- (2) Maximum duration of action[s] is: *11 months*
- (3) No applications will be accepted for projects scheduled to run for a longer period than that specified in this call for proposals.

The intention is to inform applicants of the outcome of the award procedure no later than the month of *September 2012*.

The period of eligibility of costs will start on the first day of the first month following the signature of the grant by the last of the parties. If a beneficiary can demonstrate the need to start the action before the agreement is signed, expenditure may be authorised before the agreement is signed. Under no circumstances can the eligibility period start before the date of submission of the grant application.

## 4. EU FINANCING

The **maximum budget** allocated from the Competitiveness and Innovation Framework Programme (CIP) financing decision **C(2011) 9230 of 15/12/2011** for this call for proposals is : **450,000.00 €**

**Indicative number of projects** : 3-4 projects will be co-financed

- **Maximum EU co-financing rate** of eligible costs: **75 %**
- **Maximum European Union co-financing ceiling** per project: **150,000.00 €** (one hundred fifty thousand euro)

**Proposals with an EU co-financing beyond any of the above two maxima will be ineligible.** Please refer to section 5 below.

- Please note that one action may give rise to the award of only one grant from the European Union budget to any one beneficiary.
- EU financing can never cover 100 % of the costs of an action.
- The Commission reserves the right to award a grant of less than the amount requested by the applicant. In such a case, beneficiaries proposed for award will be proposed either to increase their co-financing, propose other co-financing means or to decrease the total costs without altering the substance of the proposal. Grants will not be awarded for more than the amount requested.
- The publication (on the Internet site and/or in the Official Journal) does not guarantee the availability of funds for the above action.
- The Commission grant may not have the purpose or effect of producing a profit for the beneficiary. Profit is defined as a surplus of receipts over costs. The amount of the grant will be reduced by the amount of any surplus.

### 4.1. CO-FINANCING AND JOINT AND SEVERAL RESPONSIBILITY

The beneficiary shall supply evidence of the co-financing provided. It can be provided either by way of own resources, or in the form of financial transfers from third parties. For this call for proposals, the Commission does not accept co-financing in kind. Please refer to the Guide for Applicants, chapter IV for further details.

In case where a multi-beneficiary agreement is possible or required, all partners shall agree upon appropriate arrangements between themselves for the proper performance of the action.

In particular, they shall accept the joint and several responsibility for any amount due to the Commission by anyone of them as stipulated in article II.18 of the grant agreement.

The final grant agreement shall be signed by the co-ordinator and each participating co-beneficiary will sign a mandate (ANNEX IV of the grant agreement) conferring powers of attorney to the co-ordinator.

### 4.2. SUBCONTRACTING

Only a limited part of the project may be subcontracted, up to **60 %** of the eligible costs.

**Subcontracting does not limit the responsibilities of beneficiaries.**

**Please note that the beneficiary(ies) has(have) to have the necessary capacity to perform the project. Only tasks that are not core business can be sub-contracted to consultants.**

Please refer to the Guide for Applicants for further details on subcontracting.

### **4.3. PAYMENT ARRANGEMENTS**

The draft grant agreement annexed to this call for proposals specifies the payment arrangements in article I.5 for multiple beneficiary agreements. The agreement is attached for information only, and should not be submitted with the proposal.

Your attention is in particular drawn to part B of the General Conditions, article II.14, where the eligibility of costs is described. These costs are also further explained in chapter VII of the Guide for Applicants.

## 5. ELIGIBILITY

**APPLICATIONS MUST COMPLY WITH ALL OF THE ELIGIBILITY CRITERIA SET OUT IN THIS SECTION.**

### 5.1. GEOGRAPHICAL ELIGIBILITY

Applications from legal entities established in one of the following countries are eligible for co-financing:

- (1) EU 27 Member States.
- (2) European Free Trade Association countries (EFTA) which are members of the European Economic Area (EEA) in accordance with the conditions laid down in the EEA Agreement: Norway, Iceland, Lichtenstein
- (3) Other countries participating in the Entrepreneurship and Innovation Programme of the CIP: Croatia, the Former Yugoslav Republic of Macedonia, Turkey, Serbia, Montenegro, Albania and Israel

The participation of partners from other countries, which could be relevant for the project, is allowed but it will not be considered as concurring to the eligible costs, nor as concurring to satisfy the minimum consortium requirements stated in points 5.2 and 6 (This means that these additional countries will not be considered for verifying the eligibility criteria 5.2 (1) and 6 – consortium gathering a minimum of 3 partners, 2 different countries for public authorities, etc. Countries which will be considered for verifying these criteria will only be the ones covered by point 5.1 (1,2,3)

The transnational nature of the project must be demonstrated by filling in Form A/2 of the on-line submission Forms for each partner organisations in order to confirm their participation.

### 5.2. LEGAL STATUS ELIGIBILITY

In what follows, “applicants” and “partners” are to be understood as any potential co-signatory of the future grant agreement subject to this call, and as proposed by the applicant co-ordinator.

1. Applicants/lead organisations should act in consortium with partner organisations (see also the grant agreement in the submissions set, for reference).
2. Partners of the lead organisation must satisfy the same eligibility criteria as those for applicants; the applicant will be the coordinator.
3. Applications must be submitted by a legal person; natural persons (i.e. individuals) are not eligible.
4. Applicants from countries specified in Section 5.1 must correspond to the definition of the following target organisations:

#### 5.2.1 Public Authorities

- National Tourism Administrations (Ministry, State Secretariat) responsible for Tourism;
- National Tourism Organisations;
- Regional (or similar level in the absence of regional entities) authorities/governments. Local authorities such as local councils and municipalities are **excluded** from participating as direct beneficiaries, yet national or regional authorities are welcome to submit proposals that include representatives of local authorities as part of their team.
- Other competent public administrations :

that is any body

- whose activities are financed, for the most part, by national/regional (or similar level in the absence of regional entity) governments (**excluding local councils**) and cover at least a region (or similar territory in the absence of well-defined regional territory);

- which is subject to management supervision by the above-mentioned bodies, or having an administrative, managerial or supervisory board, composed of members more than half of which are designated by the State. Regional government or similar public legislatively registered bodies

may also participate and qualify for co-financing - as lead organisation or as partners - on behalf of a particular.

### 5.2.2 Private Stakeholders

**European and/or national (excluding regional and local) private sector stakeholders** may also participate as lead organisations and/or partners provided that they qualify under one or more of the following categories:

- Umbrella associations representing a specific tourism related sector (travel agents, tour operators, hoteliers, transport, destination management companies, unions, consumers etc)
- Chambers of commerce and industry, or similar bodies and their umbrella associations;
- Not-for profit/Non-governmental organisations, civil society organizations, foundations, think-tanks, federations of public or private bodies, whose core activity falls within the tourism field.

Only private stakeholders with strictly non-profit making tasks within the project, as reported in the technical proposal and budgetary annex, will be considered as eligible.

In all above cases, the **onus is on the applicant** to demonstrate that he/she has an acceptable legal eligibility status in accordance with the specifications.

All other stakeholders **are excluded from participating as lead organisations or partners**. It is however possible for applicants and partners to tap into existing expertise within their country by **involving other relevant stakeholders** (such as local level municipalities, NGO`s and private consultants) in setting up structures and compiling technical criteria, provided that this is clearly stipulated as part of the proposal by the partners themselves ; i.e. included in the tasks reported in the technical proposal and in heading sub-contracting in the budgetary annex. **Sub-contracting - as stipulated in the “Guide for Applicants” – would here be permissible.**

Public administrations and private sector stakeholders may participate in more than one project provided that:

- the partner assumes the role of lead organisation in only one project
- proposals are submitted in partnership with different eligible public administrations/partners per proposal
- proposals relate to different CALYPSO target groups (in multi-target group proposals overlapping of even one target group is not permissible).
- there is no duplication of expenses – within the submitted proposals - in the budgetary breakdown

Public administrations benefitting from co-financing through the CALYPSO 2010 and/or 2011 Calls for Proposals are welcome to participate in the 2012 Call too, either as lead or partner. Proposals could be submitted either in the same target groups as those indicated in the previous Calls, or in different ones.

**However, consortium partners of the previous Calypso Calls cannot form a consortium with any of the same partners in the current Call.** Partners of the 2010 and/or 2011 Calypso projects who did not receive any co-financing can, on the other hand, join any consortium.

Such administrations should also ensure that they avoid duplication of expenses between the different projects, especially since there might be some overlapping time periods if their 2012 submission is successful.

5. Corporate bodies must be properly constituted and registered under the law. If a body or organisation is not constituted under the law, a physical person must be designated to provide the legal responsibility.

6. Proposed projects should be carried out through a partnership between **at least three different stakeholders** (Lead organisation + at least two other partners having signed a duly filled in A2 form and having tasks clearly defined in the technical proposal and budgetary annex) per consortium, as follows:

a) **At least two of the partners** should be **public authorities from different countries**, within the framework of the definition in 5.2.1 "Public authorities" (to avoid confusion with 5.2.1. Applicants...).

b) **At least one of the partners** should be a **private stakeholder** within the framework of the definition in 5.2.2 "Private stakeholders". Private stakeholders may also originate from the countries covered under "Public authorities".

c) The European Commission will also view favourably proposals covering non-neighbouring **countries** (that include public administrations and/or private stakeholders from different geographical parts of Europe) and/or the inclusion of more than three partners as part of the proposal.

The eligible consortium should thus include **minimum 3 partners and 2 different countries** (one different country for each public authority):

**1 public authority from country A**

**1 public authority from country B**

**1 private stakeholder** (country A & B is also eligible)

### 5.3. EXCLUSION CRITERIA

By using the "Exclusion Criteria Form" (Form B4) applicants shall declare on their honour that they are not in one of the situations referred to in Articles 93 and 94 of the Financial Regulation.

Please note that, according to articles 96 and 114 of the Financial Regulation applicable to the general budget of the European Communities and according to article 134b of the Commission Regulation (EC, Euratom) n° 2342/2002 of 23 December 2002<sup>7</sup> laying down detailed rules for the implementation of Council Regulation (EC, Euratom) n° 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities<sup>8</sup>, administrative and financial penalties may be imposed by the Commission on applicants who are excluded in relation to points a) to h) of the form in question.

### 5.4. ELIGIBLE PROPOSALS

**Applications must comply with the following conditions in order to be eligible for a grant:**

- |  |
|--|
| <ol style="list-style-type: none"><li>1. Applications must be submitted electronically through EPSS;</li><li>2. Applications must be submitted timely, in conformity with the specifications for the submission of proposals (see point 8 below) ;</li><li>3. Only projects that are strictly non-profit-making and/or whose immediate objective is non-commercial shall be eligible.</li><li>4. Applications must respect the maximum EC contribution as laid out in section 4.</li></ol> |
|--|

<sup>7</sup> As amended by Commission Regulation 1261/2005 of 20 July 2005, Commission Regulation 1248/2006 of 7 August 2006 and Commission Regulation 478/2007 of 23 April 2007

<sup>8</sup> As amended by Council Regulation 1995/2006 of 13 December 2006

5. Applications must respect the maximum duration of projects (see section 4).
6. Applications must be in line with the scheduled start date (see section 3).
7. Applications may not include contributions in kind as part of their co-financing.

In this context, will be rejected any project directly or indirectly contrary to EU policy or against public health, human rights, citizen's security or freedom of expression.

## 6. SELECTION

The following sets out the basis for the evaluation of applicants' capacities in relation to the action. Please refer also to chapter IV of the Guide for Applicants for further details.

### 6.1. APPLICANTS' FINANCIAL CAPACITY TO COMPLETE THE PROPOSED ACTION

Applicants must show they have stable and sufficient sources of funding to ensure the continuity of their organisation throughout the project and, if necessary, to play a part in financing it.

### 6.2. EXTERNAL AUDIT REPORTS

Not applicable.

### 6.3. APPLICANTS' OPERATIONAL CAPACITY TO COMPLETE THE PROPOSED ACTION

Applicants must show they have the **operational (technical and management) capacity** to complete the operation to be supported and must **demonstrate their capacity to manage scale activity** corresponding to the size of the project for which the grant is requested. In particular, the **team responsible** for the project/operation must have **adequate professional qualifications and experience**.

## **7. AWARD**

An evaluation of the quality of proposals, including the proposed budget, will be carried out in accordance with the evaluation criteria set out in Section 11 of this call for proposals.

The complete selection and evaluation procedure is described in chapter VIII of the Guide for Applicants.

## 8. SUBMISSION OF PROPOSALS

**Please note that ONLY electronic submissions are allowed for this call.**

The proposals shall be submitted via the Electronic Proposal Submission Service (EPSS). The link to EPSS is provided on the Call website. Part A of the proposal consists of forms to be filled in directly on-line, Part B has to be uploaded in EPSS/the call's web page as .pdf or .xls files.

**Please consult the Guide for Applicants for the modalities of preparing and submitting the proposal.** The instructions and templates on how to prepare the description of the project can be found in the Annexes (Forms B1 to B6) and in the Guide for Applicants. The final version of the project description **has to be uploaded** in EPSS as a pdf file.

**The deadline for submission of proposals is:**

**11/07/2012**

## 9. CONTACTS

Contacts between the contracting authority and potential applicants can only take place in certain circumstances and under the following conditions only:

- Before the final date for submission of proposals, at the request of the applicant, the Commission may provide additional information solely for the purpose of clarifying the nature of the call.

Any requests for additional information must be made in writing only to the coordinates stated below.

The Commission may, on its own initiative, inform interested parties of any error, inaccuracy, omission or other clerical error in the text of the call for proposals.

Any additional information including that referred to above will be published on the internet in concordance with the various call for proposals documents.

- After the deadline for submission of proposals:

If clarification is requested or if obvious clerical errors in the proposal need to be corrected, the Commission may contact the applicant provided the terms of the proposal are not modified as a result.

If the authorising officer finds that those proposals, which have been listed for award needs limited adaptations to their proposal. In such case, these applicants will receive a formal letter setting out the requested modifications. Any such modifications must stay within the limits of the request. This phase will not lead to a re-evaluation of the proposals, but a proposal might be rejected if refusing to ensure a positive follow-up to the request.

### Contact coordinates for the call:

European Commission

Enterprise and Industry Directorate-General

Directorate F : Tourism, CSR, Consumer Goods and International Regulatory Agreements

Financial Team

**Call for proposals No: 40/G/ENT/CIP/12/B/N/02S03**

**Contact : [ENTR-CFP-1240-CALYPSO@ec.europa.eu](mailto:ENTR-CFP-1240-CALYPSO@ec.europa.eu)**

Office address: **B100 04/30** - B-1049 Brussels, Belgium

## 10. ANNEXES

This document is including the following annexes, which can be downloaded from the Call page:

- ü Model Grant Agreement
- ü Guide for Applicants (Including information on EPSS)
  
- ü Form B1- B2 Budgetary Forms
- ü Form B3 - Co-financing statement form
- ü Form B4 - Exclusion form
- ü Form B5 - Financial Statement Form
- ü Form B6 - Description of the project and expected results

## 11. EVALUATION CRITERIA

When assessing the below evaluation criteria, the evaluation committee generally pays attention to the elements indicated below each criterion. Please note that these elements, which are indicative and non-exhaustive, are given on the basis of transparency and in order to help applicants to improve their applications.

EVALUATION CRITERIA AND KEY ELEMENTS LIKELY TO BE ASSESSED BY THE EVALUATION COMMITTEE	MAX. SCORE
<b>1. Relevance</b>	<b>20</b>
How relevant is the proposal to the strategic need of developing low season exchanges within any of the Calypso target groups?	
To what extent do the expected results of the project further CALYPSO's work-programme and main priorities?	
Has an effort been made to strengthen the European dimension by ensuring that the proposal : - is presented in partnership between representatives of non neighbouring countries? - and/or includes more than three eligible partners in the consortium ?	
<b>2. Impact</b>	<b>40</b>
To what extent is the project likely to facilitate follow-up/multiplier effects by producing tangible and practical results? (Including possibilities for replication and extension of project outcomes, links with the proposed Calypso web platform, dissemination of information, self-sustaining structures beyond the co-financing period)	
To what extent does the proposal contain specific elements of added value, such as innovative approaches, appropriate public-private partnerships, models for good practice, elaboration on exchange mechanisms?	
To what extent will the European Commission involvement in the project or activity be publicised?	
<b>3. Quality</b>	<b>30</b>
To what extent has the project been well thought out or prepared? How clearly defined is the proposal vis-à-vis the objectives included in this Call's Section 2?	
Is the overall project design well structured and appropriate (including preparedness for evaluation)? How coherent, concrete and realistic are the activities proposed?	
<b>4. Budget</b>	<b>10</b>
To what extent is the budget clear and detailed as well as effective to implement the action ? Does the breakdown of the budget, category by category, offer a way of ensuring that the amount of the grant awarded is reasonable in relation to the expected results ?	
<b>Maximum total score</b>	<b>100</b>

If a total score lower than **60%** points or a score lower than **50%** for any of the above five criteria is obtained, the proposal will not be evaluated further.