



Submitting a successful proposal to Marco Polo

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Outline

- **10 Golden Rules for Success in MARCO POLO II –**
extended version with more focus on the criteria (eligibility, selection and award including credibility and viability)
- **General remarks & Available support**





10 Golden Rules for Success in MARCO POLO II

1. Understand the criteria and conditions!

- ▶ Carefully read the call text
- ▶ Understand all eligibility, selection & award criteria in the call (see below)
- ▶ If resubmitting, consider comments from Final Evaluation Report Form of failed proposal – this is often forgotten for resubmissions and the origin of a new failure !



Eligibility Criteria

- ▶ **GENERAL:**
 - E1 Uniqueness (yes/no)
 - E2 Transport services (yes/no)
 - E3 European Dimension – Undertakings (yes/no)
 - E4 European Dimension – Cost (yes/no)
 - E5 Type of Legal Entity (yes/no)
 - E6 Start-up action (yes/no)
- ▶ **SPECIFIC :**
 - MOD 1 to 3 (yes/no)
 - CAT 1 to 3 (yes/no)
 - MOS 1 to 3 (yes/no)
 - TAV 1 to 3 (yes/no)
 - CLA 1 to 2 (yes/no)
- ▶ **EXCLUSION CRITERIA (see call appendix 6) – declaration form**

YES ↓ NO ↘ Excluded





Selection Criteria

- ▶ S1: FINANCIAL CAPACITY OF APPLICANTS (yes/no)
- ▶ S2: TECHNICAL CAPACITY OF APPLICANTS (yes/no)

YES ↓

NO ↘ Excluded



Award Criteria

- ▶ QUANTITY OF FREIGHT SHIFTED OR TRAFFIC AVOIDED (score)
- ▶ ENVIRONMENTAL AND SOCIAL BENEFITS (score)
- ▶ CREDIBILITY OF THE ACTION (score)
- ▶ VIABILITY OF ACTION (score)
- ▶ INNOVATIVE APPROACH (score)
- ▶ DISSEMINATION PLAN (score)
- ▶ EUROPEAN ADDED VALUE (score only CLA)
- ▶ AVOIDANCE OF DISTORTION OF COMPETITION (yes/no)
- ▶ AVOIDANCE IMPACT ON PRODUCTION OUTPUT/WORKFORCE (yes/no, only TAV)



RANKING





Eligibility, Selection & Award Criteria - Summary

- **Step 1: Eligibility Criteria** – general (common for all action types) & specific (specific for the different action types) - YES/NO
- **Step 2: Selection Criteria** – common for all action types - (YES/NO)
- **Step 3: Award Criteria** - (assessment and ranking, points – all with thresholds, except distortion of competition – YES/NO)



10 Golden Rules for Success in MARCO POLO II

- **2. Form a sound partnership! (relevant for credibility)**
 - ▶ Explain role of all partners and give proof of their commitment – *“joint letter of intent” form must be signed by all partners explaining their role and commitment to the project*
 - ▶ Demonstrate the technical & financial capability of the partners (selection criteria) – *track records and CV’s, last annual financial statements*
 - ▶ A partner is not a subcontractor – vice versa





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■ **3. Aim for a high modal shift/traffic avoidance & environmental benefit!**

- ▶ The more tonnes- km shifted (or vehicle km) the better
- ▶ The more environmental efficiency (benefit per subsidy, Rs) the better
- ▶ Social benefits: extra points can be given for avoiding sensitive/metropolitan areas, natural parks etc. – *if this is addressed in the proposal*
- ▶ **Compulsory:** use the Marco Polo calculator – *attach all the pages of the calculation – not only the final page of the calculation results*



10 Golden Rules for Success in MARCO POLO II

■ **4. Key: Demonstrate that your project is credible! (1)**

- ▶ Most important award criteria – *50% of total points distributed to credibility & viability – for all action types*
- ▶ ***How to increase the credibility of your proposal?***
- ▶ Describe the market: credible market research proving the potential modal shift, address how to overcome problems in the market (low water level, border crossings, permits needed, restrictions etc.)
- ▶ Description of the type of freight and quantity of freight (tonnes) to be transported
- ▶ Return cargo specified
- ▶ **Recent** letters of intent/commitment from potential customers





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■ 4. Key: Demonstrate that your project is credible! (2)

- ▶ Realistic loading factor used – *not 100% at the start of the service*
- ▶ Prove that the commercial service is ready to start up within the eligible start-up date in the Call: - availability of the transport medium, equipment/infrastructure needed (wagons, modification of a port/terminal etc.), negotiations to obtain slots, authorisations etc.
- ▶ Letters of intent/commitment from subcontractors, especially transport operator (railway operator, railway traction, ship leasing etc.)



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■ 4. Key: Demonstrate that your project is credible! (3)

- ▶ Details about the service: - technical details of the transport medium (type, age), timetables, frequency, development of the service, transit time compared to road, transport leg defined (old and new route, maps), pre- & post carriage, passenger part (non-eligible costs).
- ▶ If upgrade – describe the existing service and what the significant extension consists of (higher frequency/freight capacity/modal shift), exclude the modal shift/costs of the existing service – **cannot be financed!**





10 Golden Rules for Success in MARCO POLO II

■ **4. Key: Demonstrate that your project is credible! (4)**

- ▶ Explaining the role of the partners and the distribution of the Marco Polo subvention between the partners – ideally there should be a balance
- ▶ Explanation of key staff involved
- ▶ Making sure that all partners (including subcontractors) are committed to the project



10 Golden Rules for Success in MARCO POLO II

■ **4. Key: Demonstrate that your project is credible & viable! (5)**

- ▶ Viability of the service after subsidy period – business plan for at least one year after the Marco Polo period – **ideally, profit-making**
- ▶ Viability not compulsory for Common learning actions
- ▶ Credible business plan – detailed business plan for the years of Marco Polo funding: separation between eligible and non-eligible costs (see call text) & revenue.





10 Golden Rules for Success in MARCO POLO II

■ 5. Show the real innovation!

- ▶ Criterion for all action types except Modal shift
- ▶ Elements which did not exist before in a given market
- ▶ New markets or technologies
- ▶ For Common learning actions: broad consortia and widespread co-operation – on a European level (not only regional), clear organisational structures
- ▶ Concrete dissemination plan (what, when, where, how, not only announcements)



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■ 6. Pay attention to possible distortions of competition!

- ▶ Honest description of existing similar services
- ▶ Very important for Modal shift actions – no need for innovative elements distinguishing the service from other services – **yes/no criterion**
- ▶ Clear delimitation against existing non-road services: different routes, segments of freight market or potential customers – **do not shift from other environmental friendly modes! (from SSS to rail etc.)**





10 Golden Rules for Success in MARCO POLO II

- **7. Justify your finances! (Credible business plan) (1)**
 - ▶ Justify all costs (for eligibility refer to call or the model contract)
 - ▶ Exclude non eligible costs (non-EU countries not fully participating, passenger costs, costs of road transport etc.)
 - ▶ Seas routes to non eligible 3rd countries, may be calculated until the foreign port (for ex. Italy to Croatia) – *important for the eligible costs (and the eligible modal shift)*



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- **7. Justify your finances! (Credible business plan) (2)**
 - ▶ No accumulated profit can be made over the whole contract duration – revenue must also be indicated
 - ▶ Marco Polo can only finance 35% of the eligible costs (50% for Common learning) – no combined public funding over this threshold – all other public funding must be indicated





10 Golden Rules for Success in MARCO POLO II

■ 8. Use the available support!

- ▶ Support tools and Helpdesk by EACI (see below)
- ▶ Use the checklist provided for each action type
- ▶ Cross-check of proposal by (project) outsider before submission



10 Golden Rules for Success in MARCO POLO II

■ 9. Write a clear and concise proposal!

- ▶ Clear, comprehensive and logical description on 10-15 pages max.
- ▶ Avoid repetitions
- ▶ Further details and confidential elements in the annexes
- ▶ Detailed description of old and new routes (with clear and comprehensive maps)
- ▶ Detailed calculations - make use of MP calculator – 1 EUR per 500 tkm shifted/avoided for all action types except CAT and CLA – take care of minimum thresholds (250 M tkm for MOD etc.)





10 Golden Rules for Success in MARCO POLO II

- **10. Take care of the formal requirements!**
 - ▶ 1 original, 5 paper copies and CD-ROM, 4 forms to be filled out (see below)
 - ▶ Signature and stamp by lead partner on original
 - ▶ Respect the **deadline – cannot be extended** - and unless explicitly requested by EACI, proposals/documents sent in **after the deadline will not be taken into account/evaluated!**



Proposal Structure (1)

- **Part I**
 - ▶ Project Overview Form (**2-3 pages**)
 - ▶ Declaration by the Applicants Form – all partners!
 - ▶ Acknowledgement of Receipt Form
 - ▶ Joint letter of intent between **all** the partners
- **Part II**
 - ▶ Main Text of the Proposal (about 10-15 pages in font size 12)





Proposal Structure (2)

- **Part III**
 - ▶ Different Annexes according to type of action to support claims in the main text:
 - maps,
 - business plan,
 - financial statements,
 - CV's,
 - market research,
 - letters of intent from customers etc.



General Remarks

- **Standardised** presentation following the structure of the Call highly advised
- Pay attention to specific documents and requirements (forms, financial statements, joint letter of intent...)
- **Good luck with your proposal!**





Available Support

■ MARCO POLO Website

http://ec.europa.eu/transport/marcopolo/index_en.htm

- ▶ Call text, model contract, templates
- ▶ Checklist, Frequently Asked Questions
- ▶ MARCO POLO calculator
- ▶ Presentations of Marco Polo conferences

■ MARCO POLO Helpdesk

- ▶ Email: eaci-marco-polo-helpdesk@ec.europa.eu
- ▶ Phone: +32 (02) 29-50924
- ▶ Fax: +32 (02) 29-79506



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<http://ec.europa.eu/transport/marcopolo>



Thank you for your attention

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