



Single Market Programme (SMP COSME)

Call for proposals

Proximity and social economy industrial ecosystem: boosting the digital transition of social economy enterprises and SMEs
(SMP-COSME-2023-SEED)

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EUROPEAN INNOVATION COUNCIL AND SMEs EXECUTIVE AGENCY (EISMEA)

EISMEA.I – Innovation ecosystems, SMP/Entrepreneurship and Consumers
EISMEA.I.02 –SMP/COSME Pillar

CALL FOR PROPOSALS

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0. Introduction

This is a call for proposals for EU **action grants** in the field of proximity and social economy ecosystem under the Competitiveness of Enterprises and SMEs strand of the **Single Market Programme (SMP COSME)**.

The regulatory framework for this EU Funding Programme is set out in:

- Regulation 2018/1046 ([EU Financial Regulation](#))
- the basic act (SMP Regulation [2021/690](#)¹).

The call is launched in accordance with the 2023 SMP Work Programme², as last amended on 25 August 2023, and will be managed by the **European Innovation Council and SMEs Executive Agency (EISMEA)** ('Agency').

The call covers the following **topic**:

- **SMP-COSME-2023-SEED-01 — Proximity and social economy industrial ecosystem: boosting the digital transition of social economy enterprises and SMEs**

Applicants may submit more than one proposal for *different projects* under the same call (and be awarded a funding for them). Organisations may participate in several proposals. BUT: if applicants submit several proposals for *very similar projects*, only one application will be accepted and evaluated; the applicants will be asked to choose one of them to be assessed (or it will be rejected).

We invite you to read the **call documentation** carefully, and in particular this Call Document, the Model Grant Agreement, the [EU Funding & Tenders Portal Online Manual](#) and the [EU Grants AGA — Annotated Grant Agreement](#).

¹ Regulation (EU) 2021/690 of the European Parliament and of the Council of 28 April 2021 establishing a programme for the internal market, competitiveness of enterprises, including small and medium-sized enterprises, the area of plants, animals, food and feed, and European statistics (Single Market Programme) (OJ L 153, 3.5.2021, p. 1).

² Annex 2 to Commission Implementing Decision C(2023) 5702 of 25.8.2023 amending the Commission implementing decision C(2023) 1119 as regards the implementation of actions under the Single Market Programme.

These documents provide clarifications and answers to questions you may have when preparing your application:

- the [Call Document](#) outlines the:
 - background, objectives, scope, activities that can be funded and the expected results (sections 1 and 2)
 - timetable and available budget (sections 3 and 4)
 - admissibility and eligibility conditions (including mandatory documents; sections 5 and 6)
 - criteria for financial and operational capacity and exclusion (section 7)
 - evaluation and award procedure (section 8)
 - award criteria (section 9)
 - legal and financial set-up of the Grant Agreements (section 10)
 - how to submit an application (section 11)
- the [Online Manual](#) outlines the:
 - procedures to register and submit proposals online via the EU Funding & Tenders Portal ('Portal')
 - recommendations for the preparation of the application
- the [AGA — Annotated Grant Agreement](#) contains:
 - detailed annotations on all the provisions in the Grant Agreement you will have to sign in order to obtain the grant (*including cost eligibility, payment schedule, accessory obligations, etc*).

You are also encouraged to visit the [EISMEA](#) website to consult the list of projects funded previously.

1. Background

[EU Policy context](#)

In March 2021, the European Commission presented the Communication [2030 Digital Compass - the European way for the Digital Decade](#). Focusing on 4 key pillars (i.e. skills, infrastructures, business and public services), this strategy sets targets and objectives to guide Europe's digital transformation by 2030. The Digital Decade acts as a comprehensive framework that will shape all digital-related actions while ensuring that all aspects of technology and innovation work for EU citizens and businesses.

In May 2021, the European Commission [updated](#) its Industrial Strategy to support the transformation to a more sustainable, digital, resilient and globally competitive economy. This, notably in the context of recovery from the COVID-19 crisis. To reach that objective, the European Commission is building on an ecosystem-based approach. The new updated strategy calls for the co-creation of transition pathways involving stakeholders to better understand the specificities, needs and required actions in each ecosystem to deliver on the twin transition.

In December 2021, the European Commission adopted the [Social Economy Action Plan](#) (SEAP) to develop the appropriate conditions to exploit the full potential of social economy by 2030. It aims at enhancing social innovation and ensuring that entities in

the ecosystem are equipped with the appropriate tools and skills to deliver on the twin transition. The SEAP stresses the importance of social economy in bridging the digital divide, acting as a proponent of a fair and inclusive digital transition. Referring to 'Tech4good', innovative digital business models and digital platforms, among others, the SEAP calls for actions to support social economy entities' digital uptake.

To deliver on the aforementioned EU digital objectives by 2030³, the European Commission released its [Digital Decade policy programme](#) in December 2022. It sets out a monitoring and cooperation mechanism involving the Commission and Member States. Besides, it also aims at accelerating and facilitating the launch of multi-country projects across various areas. Finally, the programme refers to other relevant EU data-related initiatives and programmes such as the digital Services Act, the digital Market Acts or the European Data Strategy.

Furthermore, the '[European Year of Skills 2023](#)' will give a fresh impetus to lifelong learning, address skills shortage, empower people and companies - especially SMEs - to contribute to a fair green and digital transitions while supporting innovation and competitiveness.

In the framework of the [European Skills agenda](#), [industrial ecosystems Partnerships](#) (e.g. Partnership for proximity & social economy ecosystem, partnership for the digital ecosystem) have been launched under the [Pact for Skills](#) to bring together and support all relevant entities on upskilling and reskilling needs. [Blueprints on sectoral cooperation on skills](#) are also being developed in that framework to address sector skills mismatches such as the [Blueprint for Sectoral Cooperation on Skills in Work Integration Social Enterprise](#) and the [Blueprint for Advanced Skills & Trainings in the Social Economy](#). Needs on digital skills should be also tackled.

Proximity and social economy ecosystem context

In line with the [European Commission's priorities for 2019-24](#), the SME pillar of the Single Market Programme (SMP) for 2023 supports actions aiming to foster entrepreneurship and strengthen the competitiveness of small and medium-sized enterprises (SMEs) in the EU. 99.9% of the entities in the proximity & social economy ecosystem are SMEs, with a significant part being micro enterprises and start-ups.

Social economy actors in Europe are around 2,8 million being cooperatives, mutual benefit societies, associations (including charities), foundations and social enterprises. These organisations provide 13 million paid jobs in Europe, corresponding to 6,3% of the EU workforce⁴. Considering the entire proximity & social economy ecosystem, 22,9 million people are employed, accounting for 6.54% of EU value added (EUR 791 billion)⁵. The needs of the proximity and social economy ecosystem are clearly directing into support to drive the green and digital transition, with a priority for digital skills, access to affordable, adaptable and accessible technologies as well as enabling digital pioneers in the ecosystems, for example developing tech for good.

Many entities encompassed in this ecosystem already participate in delivering inclusive and empowering digital solutions. Still, further support to social economy actors should be provided in that sense. Actions may consist in enabling framework conditions, fostering cooperation with public authorities and mainstream businesses in addition to addressing digital gaps in knowledge and skills. A European Commission

³ Communication of the European Commission COM(2021) 118 final - 2030 Digital Compass: the European way for the Digital Decade, published in March 2021.

⁴ Communication of the European Commission, Social Economy Action Plan, published in December 2021: [Action Plan to boost the social economy and create jobs - European Commission \(europa.eu\)](#)

⁵ Commission Staff Working document accompanying Annual Single Market Report 2021: [EUR-Lex - 52021SC0351 - EN - EUR-Lex \(europa.eu\)](#)

study on [new technologies and digitisation in the social economy](#) assessed several of those barriers and opportunities in details.

The **transition pathway for the proximity & social economy** which was [launched](#) in November 2022, following a co-creation process involving more than 400 ecosystem stakeholders, represents a key deliverable in the context of the updated industrial strategy and the social economy action plan. As pointed out in the transition pathway, “social economy businesses generally have a low level of digitalisation, mainly in terms of lack of digital skills and investment in digital infrastructure, and they take limited advantage of the potential offered by the platform economy. At the same time, the heterogeneity of actors within the ecosystem makes the policy analysis very complex when it comes to identifying concrete digital needs covering the entire ecosystem”. To overcome these challenges, the pathway puts forward the following 7 action areas to enable the digital transition of the ecosystem, including concrete actions under each action area.

Table 1: 7 digital action areas of the transition pathway for proximity & social economy

Transition Pathway Action Areas – Digital Transition
• New business models – the platform economy
• Data Maturity and data driven business models
• Public and private tech partnerships and support
• Data sharing, Data management & Code of Conduct
• Supporting Digital Social Innovation & Tech for Good entrepreneurship
• Access to technology
• Boosting digital skills by - and in the social economy

2. Objectives – Themes and priorities – Activities that can be funded – Financial Support to third parties – Expected impact

SMP-COSME-2023-SEED-01 — Proximity and social economy industrial ecosystem: boosting the digital transition of social economy enterprises and SMEs

Objectives

Primary objectives of this call for proposals are:

First, **strengthening the digital transition and capabilities of SMEs in the social economy** through capacity building activities, knowledge transfer and transnational cooperation, and consequently foster their economic, organisational and impact related performances.

Second objective is to **strengthen the digital capacity of ‘enabling organisations’ in the social economy**. Those are organisations representing, federating or supporting SME’s in the social economy and are operating at local, regional, national or EU level. In doing so, those organisations can multiply the effects of this call and support their members, clients and stakeholders in their digital transition as well as driving digital social innovations. Consequently, those organisations can take up an enabling role adapted to the sectoral, local or organisational context and consequent digital needs.

The first and the second objectives are primary objectives of this call.

A secondary objective is to strengthen, where digital maturity allows, the role of social economy as a driver for **digital social innovation** and consequent digital solutions and tools (e.g. tech for good) developed to answer social, societal and environmental challenges.

The proposals should take into account – where relevant – several **horizontal aspects** such as:

- The degree of digital maturity of target SMEs in the social economy as well as their enabling organisations, including differences amongst project partners and potential for transfer of knowledge between them.
- When supporting the introduction, development and design of a digital tool or technology it is important to consider affordability, adaptability and accessibility.
- Specific aspects related to the local context and activities of SME in the social economy (e.g. local economic, social, societal, or ecological challenges and business opportunities).
- The opportunity of cooperation and joint business and/or public-private initiatives (allowing to pool resources and use/ develop shared solutions).

Furthermore, proposals can target a specific subset within the social economy, for example based on communalities such as:

1. Sectoral activity within the social economy (e.g. SMEs in the social economy active in recycling, social services, retail, tourism, agri-food, health and care services, manufacturing, etc.).
2. Specific type of SMEs in social economy (e.g. social enterprises, different type of cooperatives, Work Integration Social Enterprises, foundations and philanthropic organisations, impact investors, mutual societies, etc.).
3. Geographical grouping of social economy SME's (e.g. social economy organisations in a Member State, region(s), city/ies and social economy cluster(s) or similar social economy related territorial partnerships).
4. A combination of the above-mentioned aspects.

Themes and priorities (scope)

From a thematic point of view, proposals must be focused on **at least one of the 7 action areas** of the digital chapter in the [transition pathway for proximity and social economy](#):

1. New business models – the platform economy
2. Data Maturity and data driven business models
3. Public and private tech partnerships and support
4. Data sharing, Data management & Code of Conduct
5. Supporting Digital Social Innovation & Tech for Good entrepreneurship
6. Access to technology
7. Boosting digital skills by - and in the social economy

Applicants must choose on which (one or more) of the seven (7) action areas their proposal will focus.

Activities that can be funded (scope)

As a crucial element, linked to the primary objectives of this call for proposal applicants have to (i) **identify and map the main digital needs and opportunities of the identified target group** (related to identified challenges, opportunities and innovation potentials) and (ii) directly support SMEs in the social economy as well as their enabling organisations, by setting up **capacity building** activities addressing those needs.

To address the secondary objectives of this call for proposals, applicants can propose additional activities to support the use and uptake of **digital social innovation**.

Local capacity building activities must be at the centre of the proposal. Consequently, the majority of activities and resources of the proposal must focus on capacity building for (i) SMEs in the social economy and their (ii) enabling organisations.

Transnational activities within the consortia are to be organised in support of these local actions and activities and must promote learning effects between the partners of the consortia (e.g. peer learning, train the trainer). Applicants are therefore motivated to develop consortia composed of organisations with different degrees of maturity and consequently to facilitate knowledge transfer from front-runners to organisations that are less advanced. Transnational activities can thus be developed to support the mapping exercises, jointly develop the capacity building packages or design joint Digital Social Innovation (DSI) trajectories.

I. Mapping and capacity building (mandatory)

Mapping and needs assessment

A mapping and needs assessment must be developed with the aim to have a clear picture on the main needs related to digitalisation of different type of social economy SMEs represented or supported by the project consortium. It must also identify the potential role of “enabling organisations” at EU, country or regional level in supporting the digital transition of the social economy. This assessment and mapping will be the base for the roll out of the capacity building offer/activities as well as the identification of needed digital support services to be hired by the consortia. This mapping and needs assessment must also reflect one or more selected action areas of the transition pathway for proximity and social economy (see sub-section *Themes and priorities (scope)* above).

Building on the needs analysis (what issue/challenge/gap does the project aim to address?) of the proposal, further deepening, expansion and finetuning of the mapping and needs assessment must follow during the project’s implementation in order to design most appropriate capacity building activities and support towards the targeted SMEs.

Optionally, the mapping exercise can also identify the need or opportunity for development of activities on Digital Social Innovation (DSI). When actions related to DSI are included in the proposal, clear links must be made in the planned mapping activities in order to justify the need for those actions.

Capacity building

The mapping must assure that capacity building activities (for example focusing on a certain technology or training package) are demand and purpose driven. It must allow to identify the right offer concerning training and support in implementing various technologies and digital tools, such as low/no-code technologies, platform technologies, E-sales and E-payments, business process software such as Customer

Relationship Management (CRM), Human Resource Management Systems (HRMS), Enterprise Resource Planning (ERP), etc.

Capacity building activities can have the aim to:

- boost the capacities and skills of staff, management, volunteers and target groups⁶ within SMEs in the social economy to digitise, where appropriate, their operations as well as to develop, apply and use digital products and services;
- boost the digital maturity of SMEs in the social economy allowing the introduction, testing and adaptation of (new) digital processes, digital tools and technology improving the performance of the organisation in terms of:
 - Efficiency (e.g. internal processes such as CRM, HRMS, ERP),
 - Economic performance (e.g. access to markets, visibility, offer, online sales),
 - Accessibility (e.g. website, digital services, assistive technologies),
 - Green performance (e.g. introduction of clean technologies, energy monitoring, resources management).
- support data maturity⁷ of SMEs in the social economy.
- boost new digital social entrepreneurs through incubation and acceleration, advisory services and coaching.
- strengthen the role of “enabling organisations” in their support to SMEs regarding digital transition.
- fostering cooperation between social economy entities on the one hand, and mainstream businesses, academia and public authorities on the other, leveraging these ambitions.

The **development of capacity building offer must be organised at consortium level** (e.g. shared development and testing, joint training of trainers) but needs to be **adapted to the local need of SMEs in the social economy** and their **enabling organisations** (e.g. type of social economy organisations, sectoral, type of partnership, specific local needs etc.).

Once developed, capacity building activities can be implemented to **support local SMEs in the social economy and their enabling organisations (at partner level)**. Where appropriate, capacity building sessions for SMEs in the social economy can also take place in a joint transnational mode (e.g. training, information or a peer learning sessions etc.) depending on the nature and potential common needs of SMEs in the social economy with capacity to hold training in international context (e.g. when language is not a barrier, the topic requires this etc.).

Regular **feedback loops** (e.g. experience sharing, joint problem and solution assessment, policy learnings, etc.) must be created within the transnational context of the consortium allowing learning effects and shared expertise for all partners in the consortium.

⁶ Target groups in the sense of individuals or groups with common characteristics related to the support, actions and services performed by social economy organisations (e.g. vulnerable groups, consumers, producers, start-ups, etc.)

⁷ E.g. strengthen data literacy and support potential data usage, assure compliance with data regulatory framework, introduce data infrastructure for storage and management and raise awareness about potentials in terms of data driven business models, data driven processes, data sharing and data driven innovation.

Where relevant and appropriate, shared solutions must be promoted to the maximum in order to optimise the reach-out, affordability, accessibility and inclusivity of the capacity building actions, for example through:

- Joint (group) training sessions and shared support services for staff of SMEs as well as staff of social economy intermediaries 'enabling organisations' (e.g. train the trainer);
- Shared and open technology development and engineering (e.g. within a tech cluster);
- Shared or open technology and digital tools (e.g. open software, shared or open hardware and tools);
- Shared data or open data for good (e.g. digital commons crowd sourcing, shared data spaces, data philanthropy).

Each consortium must deliver the following **mandatory activities, which are relevant for the primary objectives of this call for proposals**:

- Activity 1) Mapping and needs assessment.
- Activity 2) Organisation of transnational, national, regional or local capacity building and training activities (e.g. targeted online and on-site trainings, peer-learning sessions and awareness raising activities) primarily for SMEs in the social economy and, if appropriate, also for social economy enabling (intermediary) organisations, members of the consortium and other relevant social economy stakeholders with interest in digitisation aspects;
- Activity 3) Organisation of coaching, mentoring, advisory services (e.g. job shadowing, social intrapreneurship programs) and business support activities (e.g. incubation and scaling-up support) primarily for SMEs in the social economy and, if appropriate, also for social economy enabling (intermediary) organisations, members of the consortium and other relevant social economy stakeholders;
- Activity 4) Providing financial support to the participants (external to the consortium) for the activities organised by the consortium as specified in the below section 'Financial Support to Third Parties'.

Other potential mapping and capacity building activities, which would contribute to the fulfilment of the primary objectives of this call for proposals (non-exhaustive list):

- Mapping (SWOT) of the digital capabilities of SMEs in the social economy as well as their supporting or enabling organisations in a certain region, sector or social economy organisational type (e.g. cooperatives, associations, etc.);
- Mapping of good practices;
- Workshops and peer learning;
- Creation of a training/competence compendium and curricula;
- Market and sectoral analysis related to the digital transition (e.g. market trends, needs, innovations) of social economy SMEs;
- Study visits;
- Research and Innovation;

- Guidance;
- Matchmaking (e.g. for joint development of digital tools and support);
- Development of a joint partnership/consortium strategy towards digitalisation, supporting further implementation after the end of the project;
- Training and “Train the trainer” (capacity building of enablers);
- Policy feedback: policy recommendations and collection of best practices;
- Adaptation and customisation of existing IT tools and technologies (including testing and piloting);
- Communication and awareness raising;
- Other activities in line with the primary objectives of this call for proposals.

II. Digital Social Innovation (optional)

Applicants can choose to integrate an additional focus on promoting Digital Social Innovation practices in the proposal, with the aim to:

- Explore the potential of digital solutions for the identified challenge (start from scratch);
- Adapt successful existing digital tools and technologies to implement in another context such as digital products, services, processes and business models (start from a proven solution);
- Promote innovative approaches and strategies within social economy SMEs, e.g. based on data gathering and analysis, testing of new technologies such as assistive technologies, product or service optimisation, cross-sectoral cooperation through digital means, digital commons, joint development and ownership models, clean-technology development, etc.

Those digital innovations can, for example, seek to improve the market position of SMEs as the well-being of socially disadvantaged groups or address social problems related to marginality, inequality and social exclusion as well as to foster societal cohesion, sustainability and green transition at several stages. In general, Digital Social Innovations aim at including citizens in social objectives (e.g. democratic participation, inclusion, environmental action, circular economy) by digital means, exploiting network effects.

Activities related to Digital Social Innovation must take place in a transnational context and must be tested / piloted amongst the different partners of the consortium.

Potential activities related to Digital Social Innovation, which would contribute to the fulfilment of the secondary objective of this call for proposals (non-exhaustive list):

- Facilitate Digital Social Innovation processes (e.g. development of persona’s, customer journeys, service design application, quality and standards) allowing the development of new or adapted digital solutions;
- Adaptation or establishment of platforms networking citizens for social objectives.
- Other activities in line with the secondary objective of the call.

Non-eligible activities:

- Development/improvement of physical infrastructure and IT tools.

Financial Support to third parties

Maximum 20% **of the total grant amount** can be directed to social economy SMEs or social economy enabling (intermediary) organisations to provide financial support for their travel, accommodation, and subsistence costs to participate in activities organised by the consortium in support of their greater resilience and digital transformation.

IMPORTANT: The financial support to third parties cannot be provided through services offered by the consortium directly.

The financial support to third parties must be channelled through:

- Financial support (a contribution) paid in the form of a lump sum directly to the third party selected to participate in the scope of the eligible activities listed above (such as training courses, job shadowing, peer-learning and coaching sessions, workshops, study visits, matchmaking, knowledge sharing events etc.) for travel, accommodation and subsistence costs. The selection of third parties to such activities must ensure objective criteria and transparent selection procedures and must foster transnational and cross-border cooperation. For travelling, greener modes of transport should always be favoured, when possible. The financial support to third party is eligible only if the event (such as training courses, job shadowing, peer-learning and coaching sessions, workshops, study visits, matchmaking, knowledge sharing events etc.) is organised more than 20 kilometres away from the place of establishment of the selected organisation and if the participant took part in the complete programme of the activity.

Proposals must clearly detail:

- the objectives of the support,
- the conditions for participation,
- the results to be obtained,
- the reasons why financial support to third parties is needed and how it will be managed.
- a fixed and exhaustive list of the different types of activities for which a third party may receive financial support,
- the definition of the persons or categories of persons which may receive financial support (the third party),
- the criteria for awarding financial support,
- the criteria for calculating the exact amount of the financial support (i.e. of lump sums),
- the maximum amount to be paid to each third party (may not exceed EUR 60 000 for each third party unless a higher amount is required because the objective of the action would otherwise be impossible or overly difficult to achieve and this is duly justified in the Application Form) and the criteria for determining it.

In any case the beneficiary of the EU grant must ensure that the recipients of the financial support allow the Agency, the Commission, the European Anti-fraud Office (OLAF) and the Court of Auditors to exercise their powers of control on documents, information, even stored on electronic media, or on the final recipient's premises.

Expected impact

The call for proposals targets the following outcomes:

- Increased amount of digitally skilled workforce in the SMEs in the social economy.
- Improved knowledge and capacity when it comes to digitisation within “enabling organisations” support SMEs in the social economy.
- Increased use of new technologies and digital tools in social economy SMEs as well as overall increased digital maturity of social economy organisations.
- Enhanced digital social innovation capacity in local, regional and national social economy ecosystems.
- Increased amount of tech partnerships (physical or digital) making technology accessible affordable and adaptable through shared models.
- A vibrant and varied ecosystem of social enterprises adopting social economy models enabled by digital networks and technologies.

The impact of the mandatory activities listed above must be respectively assessed by each proposal against the following **mandatory indicators**:

- o Number of transnational capacity building activities organised, **with mandatory minimum of 4 activities** per year (12 months period) of the project’s execution;
- o Number of national, regional or local capacity building and training activities organised;
- o Number of staff, management, volunteers and target groups in SMEs in the social economy that received training;
- o Number of staff, management in social economy enabling (intermediary) organisations that received training;
- o Number of coaching, mentoring, advisory services and business support activities organised;
- o Number of SMEs in the social economy and social economy enabling (intermediary) organisations that received direct financial support (financial support to third parties), **with mandatory minimum of 250**.

Applicants must include the above indicators and also propose further SMART (i.e. Specific, Measurable, Attainable, Relevant and Timely) indicators. Indicators and targets must be coherent with the proposed mix of activities included in the proposal.

Furthermore, proposals must measure the following overarching indicators from the Single Market Programme⁸:

⁸ See Annex IV of the Regulation establishing the Single Market Programme.

1. Number of SMEs, clusters and business network organisations, and business support organisations receiving support from the programme, in particular for internationalisation, digitalisation and sustainability.
2. Number of companies supported having concluded business partnerships.
3. Number of entrepreneurs benefitting from mentoring and mobility schemes, including young, new and female entrepreneurs, as well as other specific target groups.

3. Available budget

The available call budget is **EUR 8 000 000**. This budget might be increased by maximum 20%.

We expect to fund between 6 and 8 proposals under this call for proposals.

We reserve the right not to award all available funds or to redistribute them between the call priorities, depending on the proposals received and the results of the evaluation.

4. Timetable and deadlines

Timetable and deadlines (indicative)	
Call opening:	14 September 2023
<u>Deadline for submission:</u>	<u>21 November 2023 – 17:00:00 CET</u> (Brussels)
Evaluation:	December 2023 - March 2024
Information on evaluation results:	April 2024
GA signature:	June 2024

5. Admissibility and documents

Proposals must be submitted before the **call deadline** (see *timetable section 4*).

Proposals must be submitted **electronically** via the Funding & Tenders Portal Electronic Submission System (accessible via the Topic page in the [Search Funding & Tenders](#) section). Paper submissions are NOT possible.

Proposals (including annexes and supporting documents) must be submitted using the forms provided *inside* the Submission System (⚠️ NOT the documents available on the Topic page — they are only for information).

Proposals must be **complete** and contain all the requested information and all required annexes and supporting documents:

- Application Form Part A — contains administrative information about the participants (future coordinator, beneficiaries and affiliated entities) and the summarised budget for the project (*to be filled in directly online*)

- Application Form Part B — contains the technical description of the project (*to be downloaded from the Portal Submission System, completed and then assembled and re-uploaded*)
- **mandatory annexes and supporting documents** (*to be uploaded*):
 - detailed budget table/calculator (*template available in the Submission System*): file "Tpl_Detailed Budget Table (SME COSME **GFS 90**)"
 - list of previous projects (key projects for the last 4 years) (*template available in Part B*)
 - Annex 5 to Part B - Eligibility checklist (available from EISMEA's page [here](#)).

Please note that the amounts entered into the summarised budget table (filled in directly online) must correspond to the amounts calculated in the detailed budget table. In case of discrepancies, the amounts in the online summarised budget table will prevail.

At proposal submission, you will have to confirm that you have the **mandate to act** for all applicants. Moreover, you will have to confirm that the information in the application is correct and complete and that the participants comply with the conditions for receiving EU funding (especially eligibility, financial and operational capacity, exclusion, etc). Before signing the grant, each beneficiary and affiliated entity will have to confirm this again by signing a declaration of honour (DoH). Proposals without full support will be rejected.

Your application must be **readable, accessible and printable**.

Proposals are limited to maximum **50 pages** (Part B). Evaluators will not consider any additional pages.

You may be asked at a later stage for further documents (for legal entity validation, financial capacity check, bank account validation, etc).



For more information about the submission process (including IT aspects), consult the [Online Manual](#).

6. Eligibility

Applications will only be considered eligible if their content corresponds wholly (or at least in part) to the topic description for which it is submitted.

Eligible participants (eligible countries)

In order to be eligible, the applicants (beneficiaries and affiliated entities) must:

- be legal entities (public or private bodies)
- be established in one of the eligible countries, i.e.:
 - EU Member States (including overseas countries and territories (OCTs))
 - non-EU countries:
 - listed EEA countries and countries associated to the Single Market Programme or countries which are in ongoing negotiations for an association agreement and where the agreement enters into force before grant signature ([list of participating countries](#));

- Ukraine (territories controlled by the Government of Ukraine at submission deadline), in accordance with conditions laid down in Article 9(3)(a) of the Single Market Programme Regulation, as stipulated in the Eligibility criteria section of Annex 2 to the 2023 SMP Work Programme⁹.
- be **social economy 'enabling organisation'**¹⁰ (intermediary); the organisation can be operational at national, regional or local level or
- be **support organisations active at EU level**¹¹ representing social economy entities (such as sectorial member federations and associations or networks).

In addition, the following types of entities are encouraged to participate as applicants (beneficiaries and affiliated entities) in the consortia:

- public authorities or organisations acting on behalf of a public authority, responsible for or active in the fields of social economy, economic affairs, industry, business support, incubation, EU funding opportunities, sustainable finance, impact investing or related fields;
- non-profit organisations, non-governmental organisations and private organisations established at European, national, regional and local level as social economy associations, federations, financial institutions, impact investors, business incubators & accelerators, business support centres, innovation hubs, chambers of commerce, consultancy providing sustainability and financing advisory services;
- IT and tech service and support providers;
- Expertise, knowledge centres, think tanks and research bodies in the area of digital training, digital social innovation, digital inclusive service provision, tech for good, social tech, digital commons, social economy based platforms, AI for good, assistive technologies, etc.
- private and profit-making entities also including social economy SMEs, mainstream SMEs and larger undertakings, and financial institutions;
- other relevant organisation.

Beneficiaries and affiliated entities must register in the [Participant Register](#) — before submitting the proposal — and will have to be validated by the Central Validation Service (REA Validation). For the validation, they will be requested to upload documents showing legal status and origin.

Other entities may participate in other consortium roles, such as associated partners, subcontractors, third parties giving in-kind contributions, etc (*see section 13*).

⁹ Annex 2 to Commission Implementing Decision C(2023) 1119 of 22.2.2023 on the financing of the Programme for the internal market, competitiveness of enterprises, including small and medium- sized enterprises, the area of plants, animals, food and feed, and European Statistics and the adoption of the work programme for 2023-2024, as amended by Commission Implementing Decision C(2023) 5702 of 25.8.2023.

¹⁰ These organisations can be established as business support organisation, incubator & accelerator, sectorial federation or association representing social economy entities, providing support services to social economy entities or federate social entities *at local, regional or national level*.

¹¹ These organisations can be established as business support organisation, incubator & accelerator, sectorial federation or association representing social economy entities, providing support services to social economy entities or federate social entities *at EU level*.


Specific cases

Exceptional funding — Entities from other countries (not listed above) are exceptionally eligible, if the granting authority considers their participation essential for the implementation of the action.

Natural persons — Natural persons are NOT eligible (with the exception of self-employed persons, i.e. sole traders, where the company does not have legal personality separate from that of the natural person).

International organisations — International organisations are eligible. The rules on eligible countries do not apply to them.

EU bodies — EU bodies (with the exception of the European Commission Joint Research Centre) can NOT be part of the consortium.

Associations and interest groupings — Entities composed of members may participate as 'sole beneficiaries' or 'beneficiaries without legal personality'¹².  Please note that if the action will be implemented by the members, they should also participate (either as beneficiaries or as affiliated entities, otherwise their costs will NOT be eligible).

Countries currently negotiating association agreements — Beneficiaries from countries with ongoing negotiations (*see above*) may participate in the call and can sign grants if the negotiations are concluded before grant signature (with retroactive effect, if provided in the agreement).

EU restrictive measures — Special rules apply for certain entities (*e.g. entities subject to [EU restrictive measures](#) under Article 29 of the Treaty on the European Union (TEU) and Article 215 of the Treaty on the Functioning of the EU (TFEU)*¹³ and entities covered by Commission Guidelines No [2013/C 205/05](#)¹⁴). Such entities are not eligible to participate in any capacity, including as beneficiaries, affiliated entities, associated partners, subcontractors or recipients of financial support to third parties (if any).

Following the [Council Implementing Decision \(EU\) 2022/2506](#), as of 16 December 2022, no legal commitments (including the grant agreement itself as well as subcontracts, purchase contracts, financial support to third parties etc.) can be signed with Hungarian public interest trusts established under [Hungarian Act IX of 2021](#) or any entity they maintain. Affected entities may continue to apply to calls for proposals. However, in case the Council measures are not lifted, such entities are not eligible to participate in any funded role (beneficiaries, affiliated entities, subcontractors, recipients of financial support to third parties).

In this case, co-applicants will be invited to remove or replace that entity and/or to change its status into associated partner. Tasks and budget may be redistributed accordingly.



For more information, see [Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment](#).

¹² For the definitions, see Articles 187(2) and 197(2)(c) EU Financial Regulation [2018/1046](#).

¹³ Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the [EU Sanctions Map](#).

¹⁴ Commission guidelines No [2013/C 205/05](#) on the eligibility of Israeli entities and their activities in the territories occupied by Israel since June 1967 for grants, prizes and financial instruments funded by the EU from 2014 onwards (OJEU C 205 of 19.07.2013, pp. 9-11).

Consortium composition

Proposals must be submitted by a consortium of applicants (beneficiaries; not affiliated entities), which complies with all following conditions:

- at least **six independent entities** from at least **three different eligible countries**;
- at least **one social economy 'enabling organisation'**¹⁵ (intermediary) per participating country involved in the consortium; the organisation can be operational at national, regional or local level;
- **a minimum one and a maximum two support organisations active at EU level**¹⁶ representing social economy entities¹⁷ (such as sectorial member federations and associations or networks).

The eligibility requirement of at least one social economy 'enabling organisation' (intermediary) per participating country involved in the consortium (second bullet point above) does not apply to EU level support organisations. This means that the country(-ies) of registration of participating EU level support organisations do not count for the purpose of fulfilling the eligibility requirement of the second bullet point.

Eligible activities

Eligible activities are the ones set out in section 2 above.

Projects must comply with EU policy interests and priorities (such as environment, social, security, industrial and trade policy, etc).

Financial support to third parties is allowed and will be accepted in projects as defined in section 2.

The proposal must clearly specify why financial support to third parties is needed, how it will be managed and provide a list of the different types of activities for which a third party may receive financial support. The proposal must also clearly describe the results to be obtained as defined in section 2.

Geographic location (target countries)

Proposals must relate to activities taking place in the eligible countries (*see above*).

Duration

Projects should normally range between 24 and 36 months (extensions are possible, if duly justified and through an amendment).

Project budget

Project budgets (maximum grant amount) are expected to range between EUR 900 000 and EUR 1 300 000 per project.

This does not however preclude the submission/selection of proposals requesting other amounts. The grant awarded may be lower than the amount requested.

¹⁵ These organisations can be established as business support organisation, incubator & accelerator, sectoral federation or association representing social economy entities, providing support services to social economy entities or federate social entities *at local, regional or national level*.

¹⁶ These organisations can be established as business support organisation, incubator & accelerator, sectoral federation or association representing social economy entities, providing support services to social economy entities or federate social entities *at EU level*.

¹⁷ As defined in the Communication of the European Commission, Social Economy Action Plan, published in December 2021, [Commission presents Action Plan to boost the social economy and create jobs - Employment, Social Affairs & Inclusion - European Commission \(europa.eu\)](https://ec.europa.eu/economy_finance/communication-social-economy-action-plan_en)

7. Financial and operational capacity and exclusion

Financial capacity

Applicants must have **stable and sufficient resources** to successfully implement the projects and contribute their share. Organisations participating in several projects must have sufficient capacity to implement all these projects.

The financial capacity check will be carried out on the basis of the documents you will be requested to upload in the [Participant Register](#) during grant preparation (*e.g. profit and loss account and balance sheet, business plan, audit report produced by an approved external auditor, certifying the accounts for the last closed financial year, etc*). The analysis will be based on neutral financial indicators, but will also take into account other aspects, such as dependency on EU funding and deficit and revenue in previous years.

The check will normally be done for all beneficiaries, except:

- public bodies (entities established as public body under national law, including local, regional or national authorities) or international organisations
- if the individual requested grant amount is not more than EUR 60 000.

If needed, it may also be done for affiliated entities.

If we consider that your financial capacity is not satisfactory, we may require:

- further information
 - an enhanced financial responsibility regime, i.e. joint and several responsibility for all beneficiaries or joint and several liability of affiliated entities (*see below, section 10*)
 - prefinancing paid in instalments
 - (one or more) prefinancing guarantees (*see below, section 10*)
- or
- propose no prefinancing
 - request that you are replaced or, if needed, reject the entire proposal.



For more information, see [Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment](#).

Operational capacity

Applicants must have the **know-how, qualifications** and **resources** to successfully implement the projects and contribute their share (including sufficient experience in projects of comparable size and nature).

This capacity will be assessed together with the 'Quality' award criterion, on the basis of the competence and experience of the applicants and their project teams, including operational resources (human, technical and other) or, exceptionally, the measures proposed to obtain it by the time the task implementation starts.

If the evaluation of the award criterion is positive, the applicants are considered to have sufficient operational capacity.

Applicants will have to show their capacity via the following information:

- profiles (qualifications and experience) of the staff responsible for managing and implementing the project
- description of the consortium participants
- list of previous projects (key projects for the last 4 years).

Additional supporting documents may be requested, if needed to confirm the operational capacity of any applicant.

Exclusion

Applicants which are subject to an **EU exclusion decision** or in one of the following **exclusion situations** that bar them from receiving EU funding can NOT participate¹⁸:

- bankruptcy, winding up, affairs administered by the courts, arrangement with creditors, suspended business activities or other similar procedures (including procedures for persons with unlimited liability for the applicant's debts)
- in breach of social security or tax obligations (including if done by persons with unlimited liability for the applicant's debts)
- guilty of grave professional misconduct¹⁹ (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- committed fraud, corruption, links to a criminal organisation, money laundering, terrorism-related crimes (including terrorism financing), child labour or human trafficking (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- shown significant deficiencies in complying with main obligations under an EU procurement contract, grant agreement, prize, expert contract, or similar (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- guilty of irregularities within the meaning of Article 1(2) of Regulation No [2988/95](#) (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- created under a different jurisdiction with the intent to circumvent fiscal, social or other legal obligations in the country of origin or created another entity with this purpose (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant).

Applicants will also be refused if it turns out that²⁰:

¹⁸ See Articles 136 and 141 of EU Financial Regulation [2018/1046](#).

¹⁹ Professional misconduct includes: violation of ethical standards of the profession, wrongful conduct with impact on professional credibility, false declarations/misrepresentation of information, participation in a cartel or other agreement distorting competition, violation of IPR, attempting to influence decision-making processes or obtain confidential information from public authorities to gain advantage.

²⁰ See Article 141 EU Financial Regulation [2018/1046](#).

- during the award procedure they misrepresented information required as a condition for participating or failed to supply that information
- they were previously involved in the preparation of the call and this entails a distortion of competition that cannot be remedied otherwise (conflict of interest).

8. Evaluation and award procedure

The proposals will have to follow the **standard submission and evaluation procedure** (one-stage submission + one-step evaluation).

An **evaluation committee** (assisted by independent outside experts) will assess all applications. Proposals will first be checked for formal requirements (admissibility, and eligibility, *see sections 5 and 6*). Proposals found admissible and eligible will be evaluated against the operational capacity and award criteria (*see sections 7 and 9*) and then ranked according to their scores.

For proposals with the same score (within a topic or budget envelope) a **priority order** will be determined according to the following approach:

Successively for every group of *ex aequo* proposals, starting with the highest scored group, and continuing in descending order:

- 1) Projects focusing on an action area (*see section 2*) that is not otherwise covered by higher ranked projects will be considered to have the highest priority.
- 2) The *ex aequo* proposals within the same action area (*see section 2*) will be prioritised according to the scores they have been awarded for the award criterion 'Relevance'. When these scores are equal, priority will be based on their scores for the criterion 'Impact'. When these scores are equal, priority will be based on their scores for the criterion 'Quality'.
- 3) If this does not allow to determine the priority, a further prioritisation can be done by considering the overall project portfolio and the creation of positive synergies between projects, or other factors related to the objectives of the call. These factors will be documented in the panel report.
- 4) After that, the remainder of the available call budget will be used to fund projects across the 7 different action areas (*see section 2*) in order to ensure a balanced spread of the geographical and thematic coverage and while respecting to the maximum possible extent the order of merit based on the evaluation of the award criteria.

All proposals will be informed about the evaluation result (**evaluation result letter**). Successful proposals will be invited for grant preparation; the other ones will be put on the reserve list or rejected.



No commitment for funding — Invitation to grant preparation does NOT constitute a formal commitment for funding. We will still need to make various legal checks before grant award: *legal entity validation, financial capacity, exclusion check, etc.*

Grant preparation will involve a dialogue in order to fine-tune technical or financial aspects of the project and may require extra information from your side. It may also include adjustments to the proposal to address recommendations of the evaluation committee or other concerns. Compliance will be a pre-condition for signing the grant.

If you believe that the evaluation procedure was flawed, you can submit a **complaint** (following the deadlines and procedures set out in the evaluation result letter). Please note that notifications which have not been opened within 10 days after sending are

considered to have been accessed and that deadlines will be counted from opening/access (see also [Funding & Tenders Portal Terms and Conditions](#)). Please also be aware that for complaints submitted electronically, there may be character limitations.

9. Award criteria

The **award criteria** for this call are as follows:

- **Relevance:** clarity and consistency of project, objectives (including appropriate focus on primary objectives of the call) and planning; extent to which they match the themes and priorities and objectives of the call; contribution to the EU strategic and legislative context; European/trans-national dimension; potential to develop cross-border cooperation (**30 points**).
- **Quality:**
 - **Project design and implementation:** logical links between the identified problems, needs and solutions proposed (logical frame concept); methodology for implementing the project (concept and methodology, project management, work plan (including activities, milestones and deliverables), timetable, risks and risk management, quality assurance, and monitoring and evaluation); feasibility of the project within the proposed time frame; cost effectiveness (sufficient/appropriate budget for proper implementation; best value for money); clarity, completeness and rationale of the proposed support to third parties (**30 points**).
 - **Project team and cooperation arrangements:** appropriate quality and expertise of the consortium and project teams to deliver on the project’s objectives; extent to which the role and contribution of each partner is appropriate and in line with its experience and past activities; appropriate procedures and problem-solving mechanisms for cooperating within the project teams and consortium (**30 points**).
- **Impact:** credibility, ambition and expected long-term impact of results on target groups/general public; appropriate dissemination strategy, including communication activities, for ensuring visibility and long-term impact; sustainability of results after EU funding ends; possibility to use the results in other countries; ambitious, objectively verifiable and achievable key performance indicators to measure project outcomes and expected impact (**10 points**).

Award criteria	Minimum pass score	Maximum score
Relevance	16	30
Quality — Project design and implementation	16	30
Quality — Project team and cooperation arrangements	16	30
Impact	6	10
Overall (pass) scores	70	100

Maximum points: 100 points.

Individual thresholds per criterion: 16/30, 16/30, 16/30 and 6/10 points.

Overall threshold: 70 points.

Proposals that pass the individual thresholds AND the overall threshold will be considered for funding — within the limits of the available call budget. Other proposals will be rejected.

10. Legal and financial set-up of the Grant Agreements

If you pass evaluation, your project will be invited for grant preparation, where you will be asked to prepare the Grant Agreement together with the EU Project Officer.

This Grant Agreement will set the framework for your grant and its terms and conditions, in particular concerning deliverables, reporting and payments.

The Model Grant Agreement that will be used (and all other relevant templates and guidance documents) can be found on [Portal Reference Documents](#).

Starting date and project duration

The project starting date and duration will be fixed in the Grant Agreement (*Data Sheet, point 1*). Normally the starting date will be after grant signature. A retroactive starting date can be granted exceptionally for duly justified reasons — but never earlier than the proposal submission date.

Project duration: *see section 6 above*.

Estimated starting time of the projects is September 2024.

Milestones and deliverables

The milestones and deliverables for each project will be managed through the Portal Grant Management System and will be reflected in Annex 1 of the Grant Agreement.

Furthermore, beneficiaries will be requested to submit a progress report (not linked to a request for payment) on the achievement of performance indicators covering every 6 months of the project implementation (**mandatory deliverables**).

Form of grant, funding rate and maximum grant amount

The grant parameters (*maximum grant amount, funding rate, total eligible costs, etc*) will be fixed in the Grant Agreement (*Data Sheet, point 3 and art 5*).

Project budget (maximum grant amount): *see section 6 above*.

The grant will be a budget-based mixed actual cost grant (actual costs, with unit cost and flat-rate elements). This means that it will reimburse ONLY certain types of costs (eligible costs) and costs that were *actually* incurred for your project (NOT the *budgeted* costs). For unit costs and flat-rates, you can charge the amounts calculated as explained in the Grant Agreement (*see art 6 and Annex 2 and 2a*).

The costs will be reimbursed at the funding rates fixed in the Grant Agreement (**100%** for the costs for providing financial support to third parties and **90%** for all other costs categories).

Grants may NOT produce a profit (i.e. surplus of revenues + EU grant over costs). For-profit organisations must declare their revenues and, if there is a profit, we will deduct it from the final grant amount (*see art 22.3*).

Moreover, please be aware that the final grant amount may be reduced in case of non-compliance with the Grant Agreement (*e.g. improper implementation, breach of obligations, etc*).

Budget categories and cost eligibility rules

The budget categories and cost eligibility rules are fixed in the Grant Agreement (*Data Sheet, point 3, art 6 and Annex 2*).

Budget categories for this call:

- A. Personnel costs
 - A.1 Employees, A.2 Natural persons under direct contract, A.3 Seconded persons
 - A.4 SME owners and natural person beneficiaries
- B. Subcontracting costs
- C. Purchase costs
 - C.1 Travel and subsistence
 - C.2 Equipment
 - C.3 Other goods, works and services
- D. Other cost categories
 - D.1 Financial support to third parties
- E. Indirect costs

Specific cost eligibility conditions for this call:

- personnel costs:
 - SME owner/natural person unit cost²¹: Yes
- travel and subsistence unit cost²²: Yes
- equipment costs: depreciation
- other cost categories:
 - costs for financial support to third parties: allowed; maximum amount per third party EUR 60 000, unless a higher amount is required because the objective of the action would otherwise be impossible or overly difficult to achieve and this is duly justified in the Application Form
- indirect cost flat-rate: 7% of the eligible direct costs (categories A-D, except volunteers costs and exempted specific cost categories, if any)

²¹ Commission [Decision](#) of 20 October 2020 authorising the use of unit costs for the personnel costs of the owners of small and medium-sized enterprises and beneficiaries that are natural persons not receiving a salary for the work carried out by themselves under an action or work programme (C(2020)7715).

²² Commission [Decision](#) of 12 January 2021 authorising the use of unit costs for travel, accommodation and subsistence costs under an action or work programme under the 2021-2027 multi-annual financial framework (C(2021)35) **as amended by Commission [Decision C\(2023\)4928 of 26 July 2023](#)**.

- VAT: non-deductible VAT is eligible (but please note that since 2013 VAT paid by beneficiaries that are public bodies acting as public authority is NOT eligible)
- other:
 - in-kind contributions for free are allowed, but cost-neutral, i.e. they cannot be declared as cost
 - kick off meeting: costs for kick-off meeting organised by the granting authority are eligible (travel costs for maximum 2 persons, return ticket to Brussels and accommodation for one night) only if the meeting takes place after the project starting date set out in the Grant Agreement; the starting date can be changed through an amendment, if needed
 - project websites: communication costs for presenting the project on the participants' websites or social media accounts are eligible; costs for *separate* project websites are not eligible
 - other ineligible costs: No

Reporting and payment arrangements

The reporting and payment arrangements are fixed in the Grant Agreement (*Data Sheet, point 4 and art 21 and 22*).

After grant signature, you will receive a **prefinancing** to start working on the project.

The prefinancing will be paid as follows:

- for projects of 24 months: float of **70%** of the maximum grant amount;
- for projects of more than 24 months: float of **50%** of the maximum grant amount.

The prefinancing will be paid 30 days from entry into force/10 days before starting date/financial guarantee (if required) — whichever is the latest.

For projects of 24 months there will be **no interim payments**.

For projects lasting more than 24 months, there will be **one interim payment** (with detailed cost reporting).

Payment of the balance: At the end of the project, we will calculate your final grant amount. If the total of earlier payments is higher than the final grant amount, we will ask you (your coordinator) to pay back the difference (recovery).

All payments will be made to the coordinator.



Please be aware that payments will be automatically lowered if one of your consortium members has outstanding debts towards the EU (granting authority or other EU bodies). Such debts will be offset by us — in line with the conditions set out in the Grant Agreement (*see art 22*).

Please also note that you are responsible for keeping records on all the work done and the costs declared.

Prefinancing guarantees

If a prefinancing guarantee is required, it will be fixed in the Grant Agreement (*Data Sheet, point 4*). The amount will be set during grant preparation and it will normally be equal or lower than the prefinancing for your grant.

The guarantee should be in euro and issued by an approved bank/financial institution established in an EU Member State. If you are established in a non-EU country and would like to provide a guarantee from a bank/financial institution in your country, please contact us (this may be exceptionally accepted, if it offers equivalent security).

Amounts blocked in bank accounts will NOT be accepted as financial guarantees.

Prefinancing guarantees are formally NOT linked to individual consortium members, which means that you are free to organise how to provide the guarantee amount (*by one or several beneficiaries, for the overall amount or several guarantees for partial amounts, by the beneficiary concerned or by another beneficiary, etc*). It is however important that the requested amount is covered and that the guarantee(s) are sent to us in time to make the prefinancing (scanned copy via Portal AND original by post).

If agreed with us, the bank guarantee may be replaced by a guarantee from a third party.

The guarantee will be released at the end of the grant, in accordance with the conditions laid down in the Grant Agreement.

Certificates

Depending on the type of action, size of grant amount and type of beneficiaries, you may be requested to submit different certificates. The types, schedules and thresholds for each certificate are fixed in the Grant Agreement (*Data Sheet, point 4 and art 24*).

Liability regime for recoveries

The liability regime for recoveries will be fixed in the Grant Agreement (*Data Sheet point 4.4 and art 22*).

For beneficiaries, it is one of the following:

- limited joint and several liability with individual ceilings — *each beneficiary up to their maximum grant amount*
 - unconditional joint and several liability — *each beneficiary up to the maximum grant amount for the action*
- or
- individual financial responsibility — *each beneficiary only for their own debts.*

In addition, the granting authority may require joint and several liability of affiliated entities (with their beneficiary).

Provisions concerning the project implementation

IPR rules: see Model Grant Agreement (art 16 and Annex 5):

- list of background: No
- rights of use on results: Yes
- access rights to ensure continuity and interoperability obligations: No

Communication, dissemination and visibility of funding: *see Model Grant Agreement (art 17 and Annex 5)*:

- communication and dissemination plan: Yes
- additional communication and dissemination activities: Yes

Specific rules for carrying out the action: *see Model Grant Agreement (art 18 and Annex 5)*:

- specific rules for PPI Grants for Procurement: No
- specific rules for blending operations: No

Other specificities

n/a

Non-compliance and breach of contract

The Grant Agreement (chapter 5) provides for the measures we may take in case of breach of contract (and other non-compliance issues).



For more information, *see [AGA – Annotated Grant Agreement](#)*.

11. How to submit an application

All proposals must be submitted directly online via the Funding & Tenders Portal Electronic Submission System. Paper applications are NOT accepted.

Submission is a **2-step process**:

a) create a user account and register your organisation

To use the Submission System (the only way to apply), all participants need to [create an EU Login user account](#).

Once you have an EU Login account, you can [register your organisation](#) in the Participant Register. When your registration is finalised, you will receive a 9-digit participant identification code (PIC).

b) submit the proposal

Access the Electronic Submission System via the Topic page in the [Search Funding & Tenders](#) section (or, for calls sent by invitation to submit a proposal, through the link provided in the invitation letter).

Submit your proposal in 3 parts, as follows:

- Part A includes administrative information about the applicant organisations (future coordinator, beneficiaries, affiliated entities and associated partners) and the summarised budget for the proposal. Fill it in directly online
- Part B (description of the action) covers the technical content of the proposal. Download the mandatory word template from the Submission System, fill it in and upload it as a PDF file
- Annexes (*see section 5*). Upload them as PDF file (single or multiple depending on the slots). Excel upload is sometimes possible, depending on the file type.

The proposal must keep to the **page limits** (*see section 5*); excess pages will be disregarded.

Documents must be uploaded to the **right category** in the Submission System otherwise the proposal might be considered incomplete and thus inadmissible.

The proposal must be submitted **before the call deadline** (see *section 4*). After this deadline, the system is closed and proposals can no longer be submitted.

Once the proposal is submitted, you will receive a **confirmation e-mail** (with date and time of your application). If you do not receive this confirmation e-mail, it means your proposal has NOT been submitted. If you believe this is due to a fault in the Submission System, you should immediately file a complaint via the [IT Helpdesk webform](#), explaining the circumstances and attaching a copy of the proposal (and, if possible, screenshots to show what happened).

Details on processes and procedures are described in the [Online Manual](#). The Online Manual also contains the links to FAQs and detailed instructions regarding the Portal Electronic Exchange System.

12. Help

As far as possible, ***please try to find the answers you need yourself***, in this and the other documentation (we have limited resources for handling direct enquiries):

- [Online Manual](#)
- FAQs on the Topic page (for call-specific questions in open calls; not applicable for actions by invitation)
- [Portal FAQ](#) (for general questions).

Please also consult the Topic page regularly, since we will use it to publish call updates. (For invitations, we will contact you directly in case of a call update).

Contact

For individual questions on the Portal Submission System, please contact the [IT Helpdesk](#).

Non-IT related questions should be sent at the latest 5 working days before the submission deadline to the following email address: EISMEA-SMP-COSME-ENQUIRIES@ec.europa.eu.

Please indicate clearly the reference of the call and topic to which your question relates (see *cover page*).

13. Important



IMPORTANT

- **Don't wait until the end** — Complete your application sufficiently in advance of the deadline to avoid any last minute **technical problems**. Problems due to last minute submissions (*e.g. congestion, etc*) will be entirely at your risk. Call deadlines can NOT be extended.
- **Consult** the Portal Topic page regularly. We will use it to publish updates and additional information on the call (call and topic updates).
- **Funding & Tenders Portal Electronic Exchange System** — By submitting the application, all participants **accept** to use the electronic exchange system in accordance with the [Portal Terms & Conditions](#).
- **Registration** — Before submitting the application, all beneficiaries, affiliated entities and associated partners must be registered in the [Participant Register](#). The participant identification code (PIC) (one per participant) is mandatory for the Application Form.
- **Consortium roles** — When setting up your consortium, you should think of organisations that help you reach objectives and solve problems.

The roles should be attributed according to the level of participation in the project. Main participants should participate as **beneficiaries** or **affiliated entities**; other entities can participate as associated partners, subcontractors, third parties giving in-kind contributions. **Associated partners** and third parties giving in-kind contributions should bear their own costs (they will not become formal recipients of EU funding). **Subcontracting** should normally constitute a limited part and must be performed by third parties (not by one of the beneficiaries/affiliated entities). Subcontracting going beyond 30% of the total eligible costs must be justified in the application.

- **Coordinator** — In multi-beneficiary grants, the beneficiaries participate as consortium (group of beneficiaries). They will have to choose a coordinator, who will take care of the project management and coordination and will represent the consortium towards the granting authority. In mono-beneficiary grants, the single beneficiary will automatically be coordinator.
- **Affiliated entities** — Applicants may participate with affiliated entities (i.e. entities linked to a beneficiary which participate in the action with similar rights and obligations as the beneficiaries, but do not sign the grant and therefore do not become beneficiaries themselves). They will get a part of the grant money and must therefore comply with all the call conditions and be validated (just like beneficiaries); but they do not count towards the minimum eligibility criteria for consortium composition (if any).
- **Associated partners** — Applicants may participate with associated partners (i.e. partner organisations which participate in the action but without the right to get grant money). They participate without funding and therefore do not need to be validated.
- **Consortium agreement** — For practical and legal reasons it is recommended to set up internal arrangements that allow you to deal with exceptional or unforeseen circumstances (in all cases, even if not mandatory under the Grant Agreement). The consortium agreement also gives you the possibility to redistribute the grant money according to your own consortium-internal principles and parameters (for instance, one beneficiary can reattribute its grant money to another beneficiary). The consortium agreement thus allows you to customise the EU grant to the needs inside your consortium and can also help to protect you in case of disputes.

- **Balanced project budget** — Grant applications must ensure a balanced project budget and sufficient other resources to implement the project successfully (*e.g. own contributions, income generated by the action, financial contributions from third parties, etc*). You may be requested to lower your estimated costs, if they are ineligible (including excessive).
- **No-profit rule** — Grants may NOT give a profit (i.e. surplus of revenues + EU grant over costs). This will be checked by us at the end of the project.
- **No double funding** — There is a strict prohibition of double funding from the EU budget (except under EU Synergies actions). Outside such Synergies actions, any given action may receive only ONE grant from the EU budget and cost items may under NO circumstances declared to two different EU actions.
- **Completed/ongoing projects** — Proposals for projects that have already been completed will be rejected; proposals for projects that have already started will be assessed on a case-by-case basis (in this case, no costs can be reimbursed for activities that took place before the project starting date/proposal submission).
- **Combination with EU operating grants** — Combination with EU operating grants is possible, if the project remains outside the operating grant work programme and you make sure that cost items are clearly separated in your accounting and NOT declared twice (see [AGA — Annotated Model Grant Agreement, art 6.2.E](#)).
- **Multiple proposals** — Applicants may submit more than one proposal for *different* projects under the same call (and be awarded a funding for them). Organisations may participate in several proposals. BUT: if applicants submit several proposals for *very similar* projects, only one application will be accepted and evaluated; the applicants will be asked to choose one of them to be assessed (or it will be rejected).
- **Resubmission** — Proposals may be changed and re-submitted until the deadline for submission.
- **Rejection** — By submitting the application, all applicants accept the call conditions set out in this this Call Document (and the documents it refers to). Proposals that do not comply with all the call conditions will be **rejected**. This applies also to applicants: All applicants need to fulfil the criteria; if any one of them doesn't, they must be replaced or the entire proposal will be rejected.
- **Cancellation** — There may be circumstances which may require the cancellation of the call. In this case, you will be informed via a call or topic update. Please note that cancellations are without entitlement to compensation.
- **Language** — You can submit your proposal in any official EU language (project abstract/summary should however always be in English). For reasons of efficiency, we strongly advise you to use English for the entire application. If you need the call documentation in another official EU language, please submit a request within 10 days after call publication (for the contact information, see *section 12*).
- **Transparency** — In accordance with Article 38 of the [EU Financial Regulation](#), information about EU grants awarded is published each year on the [Europa website](#).

This includes:

- beneficiary names
- beneficiary addresses
- the purpose for which the grant was awarded
- the maximum amount awarded.

The publication can exceptionally be waived (on reasoned and duly substantiated request), if there is a risk that the disclosure could jeopardise your rights and freedoms under the EU Charter of Fundamental Rights or harm your commercial interests.

- **Data protection** — The submission of a proposal under this call involves the collection, use and processing of personal data. This data will be processed in accordance with the applicable legal framework. It will be processed solely for the purpose of evaluating your proposal, subsequent management of your grant and, if needed, programme monitoring, evaluation and communication. Details are explained in the [Funding & Tenders Portal Privacy Statement](#).