COSME Programme

Call for Proposals

Social Economy Missions

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1. **INTRODUCTION AND BACKGROUND**

1.1. **Introduction**

Small and medium-sized enterprises (SME) play a crucial role in reaching the objectives of the Europe 2020 Strategy. Whereas they are considered as crucial engines for growth and job creation, their competitiveness is affected by a limited exploitation of international opportunities and innovation prospects in the Single Market and beyond.

In this context, the Programme for the competitiveness of enterprises and small and medium-sized enterprises (2014-2020), (COSME), aims to promote growth and to strengthen the competitiveness and sustainability of enterprises in the European Union.

The Executive Agency for Small and Medium-sized Enterprises (hereinafter referred to as "EASME" or the "Agency") is entrusted by the European Commission with the implementation, *inter alia*, of parts of the COSME programme.

In this respect, this call for proposals, managed by EASME, implements parts of the COSME Work Programme 2019, as last amended on 5 December 2018.

1.2. **Policy Context**

EU actions give political recognition and significance to social economy thus acting as a catalyst for reforms at Member State level. For instance as a result of the Social Business Initiative launched in 2011, several EU Member States have launched significant legislative reforms to support social economy and social enterprises in their countries.

However, EU policies for social economy development still need to be harmonised and reinforced. Due to the lack of a single social economy definition, Member States apply different subsets of the social economy principles to define and support their social economy actors.

Furthermore, social economy awareness-raising within the EU, in particular at regional and local level, is insufficient. This reduces the reach of existing EU tools and supportive schemes for social enterprises and social economy stakeholders including active collaboration of social economy networks at regional and local level to share best practices and tackle joint societal challenges.

In this context the European Commission launched the European Social Economy Regions Pilot (ESER) in February 2018 to raise awareness and build networks of social economy stakeholders at

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regional and local level. The pilot attracted 32 European regions that organised regional awareness raising events in the course of 2018 around a broad variety of priorities/topics such as social public procurement, social innovation, digitalisation, education in social economy, smart specialisation etc. Two ESER concluding events in Bilbao and Brussels gave the European Commission a clear mandate to continue with the awareness-raising campaign and streamline the initiative towards targeted inter-regional collaboration.

Participatory formats of the concluding sessions provided a unique opportunity for a discussion and an exchange of ideas; as a result, regions and cities identified concrete societal challenges which need to be addressed at regional and inter-regional level.

The present "Social Economy Missions" call for proposals follows-up on the ESER 2018 pilot and reflects the collected ideas in a broader sense.

The aim of the Social Economy Missions is to accelerate the development and acknowledgement of particular aspects of social economy at regional and local level and enhance its inter-regional dimension. It will contribute significantly to a European Social Economy community building and to boosting innovation efforts, growth and creation of high-value jobs. Where appropriate, the project will set the ground for future joint inter-regional projects under the new EU programming period 2021-2027.

The action is expected to significantly raise the extent and level of strategic inter-regional collaboration. As social economy has a high innovation potential and could serve as an effective growth accelerator, the efficient collaboration of social economy stakeholders at local, regional and inter-regional level shall contribute to the long-term sustainable competitiveness of the European social economy stakeholders.

2. **Objective(s) – Theme(s) – Activities – Outputs**

2.1. **Objectives**

The general objective of this call for proposals is to support a network of EU regional and local authorities with similar priorities/topics and experts in the field and via inter-regional collaboration contribute to gradual setting up of a permanent community of practice in the field of social economy as the key component of a sustainable European economic system.

The present "Social Economy Missions" call for proposals will support social economy consortia to pursue inter-regional collaboration through a set of social economy missions: the call foresees to create opportunities and incentives to engage in strategic inter-regional collaboration and develop collaborative projects between regional/local authorities and social economy stakeholders.

The specific objectives to be achieved through this call for proposals are the following:

- Enhancing inter-regional interaction between social economy stakeholders (public and private sector) in the field of social economy missions’ priorities/topics;
- Improving collaboration between existing social economy networks at regional and local level in the field of social economy missions’ priorities/topics;
Learning from counties\textsuperscript{6} more advanced in the social economy mission priority/topics;

Preparing the ground for future structured collaboration in the field of social economy missions’ priorities/topics (future joint inter-regional projects under the new EU programming period 2021-2027);

Preparing the ground for future collaboration with the European Commission in the field of the social economy missions’ priorities/topics;

Preparing the ground for possible replication of functional model applied in the consortium leader’s/coordinator’s county\textsuperscript{7};

Contributing to a gradual Social Economy community building.

The Social Economy Missions will bring together regional and local authorities with similar social economy priorities/topics and accompanied by a representative number of regional and local social economy stakeholders (social enterprises, SMEs, etc.).

The Social Economy Missions will help to gradually build an ecosystem of players, encouraging the interaction between different partners both at public and private level and significantly contributing to enhancing and developing the European social economy community.

2.2. **Social Economy Missions’ Priorities/Topics**

The proposals to this call for proposals must address only one of the following 4 social economy priorities/topics:

1. Socially responsible public procurement;
2. Education framework for social economy;
3. Tackling regional/local unemployment via social economy model;
4. Social economy clusters.

2.2.1. *Proposals on socially responsible public procurement*

By using purchasing power to choose socially responsible goods, services and works, public authorities at different levels can set a positive example and encourage enterprises to make wider use of social standards in the management, production and provision of services.

Socially responsible public procurement provides incentives to companies to develop socially responsible products and services.

At EU level, the 2014 EU public procurement legal framework\textsuperscript{8} entered into force in April 2016, opening up new opportunities for public authorities to promote socially responsible public procurement. A number of projects have been launched in order to encourage public authorities to include social clause to their purchasing procedures.

\textsuperscript{6} For the purpose of this call for proposals, “county” refers to a unit representing an administrative division of the respective country, i.e. region, city, municipality etc.


\textsuperscript{8}
However, implementing socially responsible public procurement in practice remains a challenge and experience shows that the opportunities arising from the existing legal framework are still insufficiently used. In addition, different regional/local public authorities, given their competencies in the field and specific conditions, address this challenge with different approach and different success level.

The "Socially Responsible Public Procurement (SRPP) Mission” will bring together a county accompanied by social economy stakeholders experienced in SRPP on one side and those counties accompanied by social economy stakeholders interested in the priority/topic. The SRPP Mission will enable presentation and interrogation of the success story in more details, it will help to identify its successes and challenges and to understand existing procurement practices in other partner counties. It will provide a platform for exchange of views on more developed inter-regional collaboration in the field.

**2.2.2. Proposals on educational framework for social economy**

Targeted awareness-raising campaigns and a number of different actions and projects for social economy stakeholders implemented at EU, national, regional and local level can contribute significantly to the raising interest in the priority/topic of social economy and increased number of the recognised social economy stakeholders in recent years.

However, lack of systematic approach to the social economy model originates from insufficient supportive educational schemes. An unexplored potential of education and its impact on social economy community building and awareness-raising is enormous.

At the European level, to enable young people to take full advantage of the cooperative enterprise option, the European Commission decided to launch a preparatory action on that priority/topic in 2019 to address challenges in that area entitled “Reducing youth unemployment: setting up co-operatives to enhance working opportunities in the EU”. The action will help to diffuse the cooperative concept and values towards young people. It will be complementary to projects aiming at boosting cooperative entrepreneurship currently being implemented under ERASMUS +9.

The "Educational Framework for Social Economy Mission" will bring together a county accompanied by relevant stakeholders (education entities included) experienced in the field on one side and those counties accompanied by social economy stakeholders interested in the priority/topic. The Mission will enable presentation and interrogation of the success story in the field in more details, it will help to identify challenges and to understand existing practices in other partner counties. It will provide a platform for exchange of views on more developed inter-regional collaboration in the field.

**2.2.3. Proposals on tackling regional/local unemployment via the social economy model**

Regional and local unemployment requires special measures to be addressed successfully. Job offers need to adequately respond to the local needs, eliminate evasion of the local workforce and at the same time contribute to regional/local sustainable economic growth.

"Tackling Regional/Local Unemployment via the Social Economy Mission" will bring together a county accompanied by social economy stakeholders experienced in the field on one side and those counties accompanied by social economy stakeholders interested in the priority/topic. The Mission will enable presentation and interrogation of the success story in more details, to identify challenges and to understand existing practices in other partner counties. It will provide a platform for exchange of views on more developed inter-regional collaboration in the field.

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2.2.4 Proposals on social economy clusters

One of the traditional functions of clusters is to help to promote start-ups and accelerators. The emphasis on the scaling-up of Social Economy and mainstream their presence and activities in the Internal Market is an important EU policy ambition. In that sense, business cooperation is undeniably important for Social Economy, within sectors, cross-sectoral, across borders and also with traditional enterprises. Therefore, clusters could be considered as a way to promote integrative cooperation between different enterprise models.

The "Social Economy Clusters Mission" will bring together a county accompanied by social economy stakeholders experienced in the field on one side and those counties accompanied by social economy stakeholders interested in the priority/topic. The Mission will enable presentation and interrogation of the success story in more details, to identify challenges and to understand existing practices and challenges in other partner counties. It will provide a platform for exchange of views on more developed inter-regional collaboration in the field.

2.3. Activities

2.3.1 Coordination and reporting

The consortium leader/coordinator will coordinate the work of the consortium and ensure the effective implementation of the tasks:

- To organise a "Social Economy Mission" in the consortium leader’s/coordinator’s county, i.e. a dedicated workshop on the selected Social Economy Mission’s priority/topic.

- To ensure an adequate follow-up of the "Social Economy Mission", including Recommendations and future follow-up actions (Summary Report), wide dissemination of the outcomes through various communication channels and final reporting.

2.3.2 Social Economy Mission

A "Social Economy Mission" and follow-up actions will be led by the consortium leader/coordinator –, with assistance of other consortium partners, in collaboration with EASME and the European Commission services where appropriate. The location of the "Social Economy Mission" will be the consortium leader’s/coordinator's county. The main tasks related to the organisation of a "Social Economy Mission" have to include:

- To participate in a co-design session designed together with Commission services to define the methodology of social economy missions. The co-design session will host 2 participants per project (consortium leader/coordinator + 1). The co-design session will be organised by EASME shortly after the start of the project as part of an official kick-off meeting.

- To organise a targeted at least 2-day workshop – the so called ‘Social Economy Mission’ - in the consortium leader’s/coordinator’s county which has to include at least:

  a) Sharing best practices/success stories experience by the consortium leader/coordinator in the field of the Social Economy Mission’s priority/topic and showcase best practices via onsite visits (where appropriate) in collaboration with regional/local social economy stakeholders;

  b) Set of parallel collaborative workshop/lab sessions to understand existing practices in other consortium partners’ counties. This will be done in collaboration with respective EASME and European Commission services;
Required participants to attend missions/workshops: regional/local authorities with competencies in the field of social economy and social economy stakeholders (social economy enterprises\textsuperscript{10} etc.) from the countries of the applicant. The minimum number of participants at one workshop is 15, plus representatives of relevant European Commission services and EASME.

To keep the European trans-regional perspective of social economy during the Social Economy Missions, participation of one European umbrella organisation supporting development of social economy at regional and local level is welcomed. A European umbrella organisation supporting development of social economy at regional and local level is an organisation representing regional and local members active in the field of social economy and promote/defend their priorities/topics and values via dialogue and communication with other partners at regional, national and EU level.

Each consortium has to provide in the project proposal a list of social economy stakeholders – social economy enterprises\textsuperscript{11} and other public and private entities specialised in social economy to be invited to the workshop. Each public authority at regional and local level participating in a consortium will coordinate participation of social economy stakeholders representing its county.

\subsection*{2.3.3 Developing recommendations for policy/ future actions}

The Social Economy Mission has to provide recommendations as part of the Summary Report for at least one of the following 3 fields:

\begin{itemize}
  \item[a)] Future targeted collaboration with the European Commission in the field of the social economy mission’s priority/topic;
  \item[b)] Future joint inter-regional projects under the new EU programming period 2021-2027 in the field of the joint social economy mission’s priority/topic;
  \item[c)] Methodology of the “success story” (officially adopted strategy/policy model in place in the consortium leader’s/coordinator’s county) to adapt to special conditions in consortium partners’ counties.
\end{itemize}

The Recommendations will constitute a key part of the Summary Report. They shall reflect outcomes of the parallel collaborative workshop/lab sessions and develop further their findings. In addition to proposals for at least one of the three goals stipulated in 2.3.3, the recommendations shall build on existing synergies and may include proposals for future collaboration with existing platforms such as Interreg Europe Policy Learning Platform.

In the Summary Report an appropriate planning for the follow-up of the Social Economy Mission (for example contacts with existing European platforms such as Interreg Policy Learning Platform)

\textsuperscript{10} \url{http://www.ess-europe.eu/en/node/5713}.

\textsuperscript{11} For the purpose of this call for proposals, the ‘social economy enterprises’ refer to a diversity of enterprises and organisations, such as cooperatives, mutuals, associations, foundations, social enterprises or paritarian institutions of social protection, that are united by common values and characteristics. Enterprises and organisations of all sizes, ranging from SMEs to large companies and corporations, that operate in all the economic sectors, such as industry, education, healthcare and social services of general interest, agri-food, banking, insurance, renewable energies, re-use and recycling, retail, housing, tourism, culture and leisure, building, professional services, digital economy, etc. Because of their strong connection with the civil society and their social commitment, social economy enterprises and organisations are at the forefront when it comes to offering innovative solutions to the main economic, social and environmental challenges of our time.\textsuperscript{11}
to regularly exchange best practices and peer learning) shall be ensured by all the partners in the consortium.

The Summary Report shall be submitted in English within 3 weeks after the official completion of the Social Economy Mission (targeted workshop). The length of the Summary Report shall not exceed 10 pages (without annexes). A fresh, contemporary visual format of the report is recommended and welcome. The Summary Report, and in particular the Recommendations will provide an important input for shaping future policies in the field of social economy following the bottom-up approach.

Each proposal for a Social Economy Mission must contain a methodology to address all the above-mentioned activities and must explain in details an implementation procedure. Applicants are free to propose additional types of activities (to those listed above), if duly justified as fulfilling the objectives and priorities/topics of this call for proposals. The final agenda of the workshops will be discussed and agreed together with EASME and the European Commission services.

2.4. Outputs and deliverables

The project deliverables will be:

1. One targeted Social Economy Mission/workshop as stipulated in section 2.3.2;

2. Summary Report as stipulated in the section 2.3.3.

2.5. Project Indicators

Quality, impact and visibility of the supported actions on raising social economy stakeholders collaboration at regional and interregional level to be measured against the following indicators:

- Number, geographical and typology variety of stakeholders having participated in a targeted workshop;

- Number of proposed recommendations;

- Number of new inter-regional partnerships initiated during the Social Economy Mission.

The proposal has to include target values for the proposed indicators. Moreover, specific outcome indicators have to be defined for each project proposal, depending on the concrete results/outcomes foreseen for the specific project.

3. TIMETABLE

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<tr>
<td>a) Deadline for submitting applications</td>
<td>26 September 2019, 17:00 Brussels time</td>
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<td>b) Evaluation period*</td>
<td>October 2019 – December 2019</td>
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<td>c) Information to applicants*</td>
<td>January– February 2020</td>
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<td>d) Signature of grant agreements*</td>
<td>March – April 2020</td>
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**4. Budget Available and Funding of Projects**

The total budget earmarked for the co-financing of projects is estimated at EUR 400.000.

The maximum grant per project will be EUR 50.000.

EASME expects to fund 8 proposals (2 proposals per each priority/topic). If there are no sufficient proposals passing the overall and individual thresholds of the award criteria in one of the priorities/topics, EASME reserves the right to reallocate available funds in order to fund good quality proposals from other priorities/topics.

The reimbursement rate for this grant is maximum 90 % of eligible costs.

EASME reserves the right not to distribute all the funds available.

**5. Admissibility Requirements**

The following requirements must be complied with:

- Applications must be submitted no later than the deadline for submitting applications referred to in section 3;
- Applications must be submitted in writing, using the electronic system specified in section 16;
- Applications must be drafted in one of the official EU languages.

Failure to comply with those requirements will lead to the rejection of the application.

Incomplete applications may be considered inadmissible. This refers to the requested administrative data, the proposal description and requested grant amount, and any supporting documents specified in this call for proposals.

**6. Eligibility Criteria**

6.1. Eligible applicants

Applicants must be legal entities forming a consortium.

Such entities may include:

- Public authorities (at regional or local level);
- Social economy enterprises;
- Other public and private entities specialised in social economy.
The applicant must be a legal entity with a legal personality. In the case of private bodies, they must be properly constituted and registered under national law.

Linked third parties, i.e. legal entities having a legal or capital link with applicants, which is neither limited to the action nor established for the sole purpose of its implementation, may take part in the action as applicants in order to declare eligible costs.

Natural persons are not eligible.

Only applications from legal entities established in the following countries are eligible:

- EU Member States;
- countries participating in the COSME programme pursuant to Article 6 of the COSME Regulation\(^{12}\).

6.2. Eligible consortia

Proposals must be submitted by consortia:

a) composed of at least three different legal entities and

b) established in a minimum of three different EU Member States or countries participating in the COSME programme according to Article 6 of the COSME Regulation\(^{13}\)

c) including at least one public authority at regional or local level from each country represented in the consortium

d) the coordinator/consortium leader has to be a local or regional public authority able to show case best practice in the social economy mission’s topic

Consortia must verify and declare through their consortium leader/coordinator that none of their members participates in another proposal within the same priority/topic under this call for proposals. This rule is not applicable for the European umbrella organisation (see paragraph 2.3.2.). If such a case is detected by the funding body, it will lead to the rejection of the organisation concerned from all respective proposals under the relevant priority/topic. The respective consortia affected by the rejection of (a) partner(s) must still fulfil the eligibility criteria as stipulated in sections 6.1 and 6.2 in order to be considered eligible.

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\(^{12}\) The following groups of countries are eligible for participation in COSME according to Article 6 COSME Regulation:

a. European Free Trade Association (EFTA) countries which are members of the European Economic Area (EEA), in accordance with the conditions laid down in the EEA Agreement, and other European countries when agreements and procedures so allow;

b. acceding countries, candidate countries and potential candidates in accordance with the general principles and general terms and conditions for the participation of those countries in the Union's programmes established in the respective Framework Agreements and Association Council Decisions, or similar arrangements;

c. countries falling within the scope of the European neighbourhood policies, when agreements and procedures so allow and in accordance with the general principles and general terms and conditions for the participation of those countries in the Union's programmes established in the respective Framework Agreements, Protocols to Association Agreements and Association Council Decisions.

The updated list of eligible third countries is available on the following webpage: [http://ec.europa.eu/growth/smes/cosme/index_en.htm](http://ec.europa.eu/growth/smes/cosme/index_en.htm). Proposals from applicants in Article 6 countries may be selected provided that, on the date of award, agreements have been signed setting out the arrangements for the participation of those countries in the programme.

6.3. For British applicants

Please be aware that eligibility criteria must be complied with for the entire duration of the grant. If the United Kingdom withdraws from the EU during the grant period without concluding an agreement with the EU ensuring in particular that British applicants continue to be eligible, you will cease to receive EU funding (while continuing, where possible, to participate) or be required to leave the project on the basis of Article 34.3.1(b) of the grant agreement.

6.4 Implementation period

- activities may not start before signature of the contract;
- the project duration is 6 months.

Applications for projects scheduled to run for a shorter or longer period than that specified in this call for proposals will not be accepted.

7. Exclusion Criteria

7.1. Exclusion

The authorising officer shall exclude an applicant from participating in call for proposals procedures where:

(a) the applicant is bankrupt, subject to insolvency or winding-up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended, or it is in any analogous situation arising from a similar procedure provided for under EU or national laws or regulations;

(b) it has been established by a final judgment or a final administrative decision that the applicant is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the applicable law;

(c) it has been established by a final judgment or a final administrative decision that the applicant is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the applicant belongs, or by having engaged in any wrongful intent or gross negligence, including, in particular, any of the following:
   (i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of eligibility or selection criteria or in the performance of a contract, a grant agreement or a grant decision;
   (ii) entering into agreement with other applicants with the aim of distorting competition;
   (iii) violating intellectual property rights;
   (iv) attempting to influence the decision-making process of the Agency during the award procedure;
   (v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure;

(d) it has been established by a final judgment that the applicant is guilty of any of the following:
   (ii) corruption, as defined in Article 4(2) of Directive (EU) 2017/1371 or Article 3 of the Convention on the fight against corruption involving officials of the European
Communities or officials of Member States of the European Union, drawn up by the Council Act of 26 May 1997, or conduct referred to in Article 2(1) of Council Framework Decision 2003/568/JHA, or corruption as defined in the applicable law;

(iii) conduct related to a criminal organisation, as referred to in Article 2 of Council Framework Decision 2008/841/JHA;

(iv) money laundering or terrorist financing within the meaning of Article 1(3), (4) and (5) of Directive (EU) 2015/849 of the European Parliament and of the Council;

(v) terrorist offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting, aiding, abetting or attempting to commit such offences, as referred to in Article 4 of that Decision;

(vi) child labour or other offences concerning trafficking in human beings as referred to in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council;

(e) the applicant has shown significant deficiencies in complying with main obligations in the performance of a contract, a grant agreement or a grant decision financed by the Union's budget, which has led to its early termination or to the application of liquidated damages or other contractual penalties, or which has been discovered following checks, audits or investigations by an authorising officer, OLAF or the Court of Auditors;

(f) it has been established by a final judgment or final administrative decision that the applicant has committed an irregularity within the meaning of Article 1(2) of Council Regulation (EC, Euratom) No 2988/95;

(g) It has been established by a final judgement or final administrative decision that the applicant has created an entity in a different jurisdiction with the intent to circumvent fiscal, social or any other legal obligations of mandatory application in the jurisdiction of its registered office, central administration or principal place of business;

(h) it has been established by a final judgement or final administrative decision that an entity has been created with the intent referred to in point (g);

(i) for the situations referred to in points (c) to (h) above, the applicant is subject to:

(i) facts established in the context of audits or investigations carried out by European Public Prosecutor's Office after its establishment, the Court of Auditors, the European Anti-Fraud Office or the internal auditor, or any other check, audit or control performed under the responsibility of an authorising officer of an EU institution, of a European office or of an EU agency or body;

(ii) non-final judgments or non-final administrative decisions which may include disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics;

(iii) facts referred to in decisions of persons or entities being entrusted with EU budget implementation tasks;

(iv) information transmitted by Member States implementing Union funds;

(v) decisions of the Commission relating to the infringement of Union competition law or of a national competent authority relating to the infringement of Union or national competition law; or

(vi) decisions of exclusion by an authorising officer of an EU institution, of a European office or of an EU agency or body.
7.2. Remedial measures

If an applicant declares one of the situations of exclusion listed above (see section 7.4), it must indicate the measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. This may include e.g. technical, organisational and personnel measures to correct the conduct and prevent further occurrence, compensation of damage or payment of fines or of any taxes or social security contributions. The relevant documentary evidence which illustrates the remedial measures taken must be provided in annex to the declaration. This does not apply for situations referred in point (d) of section 7.1.

7.3. Rejection from the call for proposals

The authorising officer shall not award a grant to an applicant who:

(a) is in an exclusion situation established in accordance with section 7.1; or
(b) has misrepresented the information required as a condition for participating in the procedure or has failed to supply that information; or
(c) was previously involved in the preparation of documents used in the award procedure where this entails a breach of the principle of equal treatment, including distortion of competition, that cannot be remedied otherwise.

Administrative sanctions (exclusion) may be imposed on applicants or linked third parties where applicable, if any of the declarations or information provided as a condition for participating in this procedure prove to be false.

7.4. Supporting documents

Applicants must provide a declaration on their honour certifying that they are not in one of the situations referred to in Articles 136(1) and 141 of the EU Financial Regulation (FR)\(^\text{14}\), by filling in the relevant form attached to the application form accompanying this call for proposals.

8. SELECTION CRITERIA

8.1 Financial capacity

Applicants must have stable and sufficient sources of funding to maintain their activity throughout the duration of the grant and to participate in its funding. The applicants' financial capacity will be assessed on the basis of the following supporting documents:

a) Low value grants ($\leq$ EUR 60 000):
   - a declaration on their honour.

b) Grants $\geq$ EUR 60 000:
   - a declaration on their honour and,

EITHER

- the profit and loss account, the balance sheet for the last financial year for which the accounts were closed;
- for newly created entities, the business plan might replace the above documents.

OR

- the table provided for in the application form, filled in with the relevant statutory accounting figures, in order to calculate the ratios as detailed in the form.

The above-listed documents will have to be provided at later stage, via the electronic submission tool and only upon request of EASME.

On the basis of the documents submitted, if the authorising officer considers that financial capacity is weak, s/he may:

- request further information;
- decide not to give pre-financing;
- decide to give pre-financing paid in instalments;
- decide to give pre-financing covered by a bank guarantee (see section 12.4 below);
- where applicable, require the joint and several financial liability of all the co-beneficiaries.\(^{15}\)

If the authorising officer considered that the financial capacity is insufficient s/he will reject the application.

8.2 Operational capacity

Applicants must have the professional competencies as well as appropriate qualifications necessary to complete the proposed action.

In this respect, applicants have to submit a declaration on their honour, and the following supporting documents:

- a summary table indicating the persons that will make up the core team responsible for the project with their qualifications and competences;
- a brief summary from the consortium leader’s/coordinator’s country on an official strategy/policy paper/action plan or another prove of evidence on successful regional/local model in place in the field of the social economy mission’s priority/topic.

9. AWARD CRITERIA

Eligible applications will be assessed on the basis of the following criteria:

\(^{15}\) The beneficiaries are advised to define this situation also in the consortium agreement (see Article 25 of the model Grant agreement).
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max. score</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Relevance of the actions in view of the objectives of the call</strong> <em>(meeting objectives of the call; appropriate results; appropriate partnership: competences and European dimension)</em></td>
<td>30</td>
</tr>
<tr>
<td>How does the proposed action address the Social Economy Mission’s priority/topic? Does it contain relevant creative or innovative ideas (in addition to the obligatory methodology) to enhance inter-regional collaboration in the field of the social economy mission’s priority/topic?</td>
<td></td>
</tr>
<tr>
<td>Does the official strategy/policy paper/action plan clearly demonstrate sufficient basis and added value of the best practice for the chosen priority/topic and potential future inter-regional collaboration?</td>
<td></td>
</tr>
<tr>
<td>How strategically chosen are the consortium partners in terms of broad geographical balance?</td>
<td></td>
</tr>
<tr>
<td>Is the list of potential workshop participants realistic and relevant for the objectives of the call?</td>
<td></td>
</tr>
<tr>
<td><strong>Quality of the proposed actions</strong> <em>(clear and feasible description of actions; appropriate allocation of resources, including management)</em></td>
<td>30</td>
</tr>
<tr>
<td>How clear and coherent is the project proposal?</td>
<td></td>
</tr>
<tr>
<td>To what extent is a targeted workshop clearly defined in terms of schedule, deliverables, continuity and flexibility for applying innovative participatory facilitating methods during the targeted workshop?</td>
<td></td>
</tr>
<tr>
<td>To what extent can the methodology and management set up be effective and ensure the high quality of the action proposed?</td>
<td></td>
</tr>
<tr>
<td><strong>Impact on target audience</strong> <em>(appropriate impact indicators; dissemination; project continuation)</em></td>
<td>20</td>
</tr>
<tr>
<td>Is the proposal suggesting clear, realistic and measurable impact indicators?</td>
<td></td>
</tr>
<tr>
<td>To what extent is the project likely to have a tangible impact on the target group?</td>
<td></td>
</tr>
<tr>
<td>Are the expected multiplying effects reasonable? Does the proposal include suggestions for new partnerships to multiply effects?</td>
<td></td>
</tr>
<tr>
<td><strong>Cost-effectiveness</strong> <em>(coherence, detail and clarity between actions proposed and budgeted resources)</em></td>
<td>20</td>
</tr>
<tr>
<td>To what extent the detailed budget is coherent with the proposed actions?</td>
<td></td>
</tr>
<tr>
<td>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?</td>
<td></td>
</tr>
<tr>
<td>To what extent is the proposed expenditure necessary for the implementation of the project?</td>
<td></td>
</tr>
<tr>
<td>Do the expected results stand in a reasonable relationship to the amount of</td>
<td></td>
</tr>
</tbody>
</table>
In order to be considered for funding, proposals will need to have passed an overall threshold of 70% in terms of total score. In addition, thresholds of 50% will be applied to each individual award criterion described above in order to ensure a consistent minimum quality for all award criteria. Proposals will be ranked according to their total score.

10. LEGAL COMMITMENTS

In the event of a grant awarded by EASME, a grant agreement drawn up in euro and detailing the conditions and level of funding, will be sent to the applicant, as well as the information on the procedure to formalise the agreement of the parties.

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.

The authorising officer may draw a reserve list of proposals that have passed the above thresholds. In the event that the original budget of the call is increased or that selected proposal(s) fail to conclude the grant agreement, a grant may be awarded to proposals from the reserve list, following their order on the ranking list in accordance with the scores obtained.

11. ADMINISTRATIVE REVIEW PROCEDURES

Unsuccessful applicants may request the review of the admissibility and eligibility procedure and the evaluation procedure with regard to their proposal as specified in section V of the Guide for applicants.

12. FINANCIAL PROVISIONS

12.1 General principles

a) Non-cumulative award

An action may only receive one grant from the EU budget.

In no circumstances shall the same costs be financed twice by the Union budget. To ensure this, applicants shall indicate the sources and amounts of Union funding received or applied for the same action or part of the action or for its functioning during the same financial year as well as any other funding received or applied for the same action.

b) Non-retroactivity

No grant may be awarded retrospectively for actions already completed.

A grant may be awarded for an action which has already begun only where the applicant can demonstrate the need to start the action before the grant agreement is signed.
In such cases, costs eligible for financing may not have been incurred prior to the date of submission of the grant application.

c) Co-financing

Co-financing means that the applicant must ensure that the resources which are necessary to carry out the action may not be entirely provided by the EU grant. Co-financing may take the form of:

- the beneficiary's own resources;
- income generated by the action;
- financial contributions from third parties.

d) Balanced budget

The estimated budget of the action is to be attached to the application form. It must have revenue and expenditure in balance.

The budget must be drawn up in euros.

Applicants for whom costs will not be incurred in euros, should use the exchange rate published on the Info-euro website available at: http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm.

e) Implementation contracts/subcontracting

Where the implementation of the action requires the award of procurement contracts (implementation contracts), the beneficiary must award the contract to the bid offering best value for money or the lowest price (as appropriate), avoiding conflicts of interests and retain the documentation for the event of an audit.

In the event of procurement exceeding EUR 60 000, the beneficiary must abide by special rules as referred in the grant agreement annexed to the call. Moreover the beneficiary is expected to clearly document the tendering procedure and retain the documentation for the event of an audit.

Entities acting in their capacity of contracting authorities in the meaning of Directive 2014/24/EU\(^{16}\) or contracting entities in the meaning of Directive 2014/25/EU\(^{17}\) must comply with the applicable national public procurement rules. The beneficiary is expected to clearly document the tendering procedure and retain the documentation for the event of an audit.

Beneficiaries may subcontract tasks forming part of the action as described in the proposal. If they do so, they must ensure that, in addition to the above-mentioned conditions of best value for money and absence of conflicts of interests, the following conditions are also complied with:

(i) subcontracting does not cover core tasks of the action;

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(ii) recourse to subcontracting is justified because of the nature of the action and what is necessary for its implementation;

(iii) the estimated costs of the subcontracting are clearly identifiable in the estimated budget;

(iv) any recourse to subcontracting, if not provided for in description of the action, is communicated by the beneficiary and approved by the Agency. The Agency may grant approval:

   (i) before any recourse to subcontracting, if the beneficiaries requests an amendment

   (ii) after recourse to subcontracting if the subcontracting:

   − is specifically justified in the interim or final technical report and

   − does not entail changes to the grant agreement which would call into question the decision awarding the grant or be contrary to the equal treatment of applicants;

(v) the beneficiaries ensure that certain conditions applicable to beneficiaries, enumerated in the grant agreement (e.g. visibility, confidentiality, etc.), are also applicable to the subcontractors.

f) Financial support to third parties.

Applications may not envisage provision of financial support to third parties.

12.2 Funding forms

Grants are calculated on the basis of a detailed estimated budget indicating clearly the costs that are eligible for EU funding. The grant amount may neither exceed the eligible costs nor the amount requested. Amounts are indicated in euros.

- Maximum EU contribution requested

The EU contribution is limited to a maximum co-financing rate of eligible costs indicated in section 4. Consequently, part of the total eligible expenses entered in the estmative budget must be financed from sources other than the EU grant (see section 12.1c).

- Eligible costs

'Eligible costs' shall meet all the following criteria:

✓ they are incurred by the beneficiary;

✓ they are incurred during the duration of the action, with the exception of costs relating to final reports and audit certificates;

The period of eligibility of costs will start as specified in the grant agreement. If a beneficiary can demonstrate the need to start the action before the agreement is signed, expenditure may be authorised before the grant is awarded. Under no circumstances can the eligibility period start before the date of submission of the grant application (see section 12.1 b).

✓ they are indicated in the estimated budget of the action;
they are necessary for the implementation of the action which is the subject of the grant;

they are identifiable and verifiable, in particular being recorded in the accounting records of the beneficiary and determined according to the applicable accounting standards of the country where the beneficiary is established and according to the usual cost accounting practices of the beneficiary;

they comply with the requirements of applicable tax and social legislation;

they are reasonable, justified, and comply with the requirements of sound financial management, in particular regarding economy and efficiency.

The beneficiary's internal accounting and auditing procedures must permit direct reconciliation of the costs and revenue declared in respect of the action/project with the corresponding accounting statements and supporting documents.

In addition for **unit costs**:

- the number of actual units must comply with the following conditions:
  - the units must be actually used or produced during the duration of the action;
  - the units must be necessary for implementing the action or produced by it, and
  - the number of units must be identifiable and verifiable, in particular supported by records and documentation.

Further details are included in the model grant agreement.

Eligible costs may be direct or indirect.

**Eligible direct costs**

The eligible direct costs for the action are those costs which, with due regard for the conditions of eligibility set out above, are identifiable as specific costs directly linked to the performance of the action and which can therefore be booked to it directly, such as:

**A. Direct personnel costs**

Types of eligible personnel costs

**A.1** Personnel costs are eligible if they are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action ('*costs for employees (or equivalent)*'). They must be limited to salaries (including during parental leave), social security contributions, taxes and other costs included in the *remuneration*, if they arise from national law or the employment contract (or equivalent appointing act).

They may also include *additional remuneration* for personnel assigned to the action (including payments on the basis of supplementary contracts regardless of their nature), if:

- it is part of the beneficiary’s usual remuneration practices and is paid in a consistent manner whenever the same kind of work or expertise is required;
(b) the criteria used to calculate the supplementary payments are objective and generally applied by the beneficiary, regardless of the source of funding used.

A.2 The costs for natural persons working under a direct contract with the beneficiary other than an employment contract or seconded by a third party against payment are eligible personnel costs, if:

(a) the person works under conditions similar to those of an employee (in particular regarding the way the work is organised, the tasks that are performed and the premises where they are performed);

(b) the result of the work carried out belongs to the beneficiary, and

(c) the costs are not significantly different from those for personnel performing similar tasks under an employment contract with the beneficiary.

The costs of the personnel of national administrations are eligible to the extent that they relate to the cost of activities which the relevant public authority would not carry out if the project concerned were not undertaken;

A.3 Costs of owners of beneficiaries that are small and medium-sized enterprises (‘SME owners’), who are working on the action and who do not receive a salary are eligible personnel costs, if they correspond to the amount per unit set out in Annex 2a of the model grant agreement multiplied by the number of actual hours worked on the action.

Further details of the calculation of personal costs included in the model grant agreement.

B. Direct costs of subcontracting (including related duties, taxes and charges, such as non-deductible value added tax (VAT) paid by beneficiaries that are not public bodies acting as public authority) are eligible if the conditions set out in the grant agreement are met.

C. Direct costs of providing financial support to third parties are not applicable.

D. Other direct costs

D.1 Travel costs and related subsistence allowances (including related duties, taxes and charges, such as non-deductible value added tax (VAT) paid by beneficiaries that are not public bodies acting as public authority) are eligible if they are in line with the beneficiary’s usual practices on travel.

D.2 The depreciation costs of equipment, infrastructure or other assets (new or second-hand) as recorded in the beneficiary’s accounts are eligible, if they were purchased in accordance with the conditions set out in the grant agreement and written off in accordance with international accounting standards and the beneficiary’s usual accounting practices.

The costs of renting or leasing equipment, infrastructure or other assets (including related duties, taxes and charges, such as non-deductible value added tax (VAT) paid by beneficiaries that are not public bodies acting as public authority) are also eligible, if they do not exceed the depreciation costs of similar equipment, infrastructure or assets and do not include any financing fees.

The only portion of the costs that will be taken into account is that which corresponds to the duration of the action and rate of actual use for the purposes of the action.

D.3 Costs of other goods and services (including related duties, taxes and charges, such as non-deductible value added tax (VAT) paid by beneficiaries that are not public bodies acting as public
authority) are eligible, if they are purchased specifically for the action and in accordance with the conditions set out in the grant agreement.

Such goods and services include, for instance, consumables and supplies, dissemination, protection of results, certificates on the financial statements (if they are required by the Agreement), translations and publications.

E. Eligible indirect costs (overheads)

**Indirect costs** are costs that are not directly linked to the action implementation and therefore cannot be attributed directly to it. **Indirect costs** are eligible if they are declared on the basis of the flat-rate of 7% of the eligible direct costs, including “Direct personnel costs”; “Direct costs of subcontracting” and “Other direct costs”.

Indirect costs may not include costs entered under another budget heading.

Applicants’s attention is drawn to the fact that in the case of beneficiaries receiving an operating grant financed by the EU or Euratom budget, they cannot declare indirect costs for the period covered by the operating grant, unless they can demonstrate that the operating grant does not cover any costs of the action. In order to demonstrate this, in principle, the beneficiary should:

a. use *analytical cost accounting that allows to separate all costs (including overheads)* attributable to the operating grant and the action grant. For that purpose the beneficiary should use *reliable accounting codes and allocation keys* ensuring that *the allocation of the costs is done in a fair, objective and realistic way*.

b. *record separately*:

– all costs incurred for the operating grants (i.e. personnel, general running costs and other operating costs linked to the part of its usual annual activities), and

– all costs incurred for the action grants (including the actual indirect costs linked to the action).

If the operating grant covers the entire usual annual activity and budget of the beneficiary, the latter is not entitled to receive any indirect costs under the action grant.

➤ **Ineligible costs**

(a) costs related to return on capital;
(b) debt and debt service charges;
(c) provisions for future losses or debts;
(d) interest owed;
(e) doubtful debts;
(f) currency exchange losses;
(g) bank costs charged by the beneficiary’s bank for transfers from the Agency;
(h) excessive or reckless expenditure;
(i) deductible VAT;
(j) costs incurred during suspension of the implementation of the action;

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18 For the definition, see Article 180(2)(b) of the EU Financial Regulation 2018/10146: ‘**operating grant**’ means financial contribution, to the functioning of a body which has an objective forming part of, and supporting, an Union policy, by means of a financial contribution to its work programme.
(k) in-kind contributions provided by third parties;
(l) costs declared under another EU or Euratom grant (including grants awarded by a Member State and financed by the EU or Euratom budget and grants awarded by bodies other than the Agency for the purpose of implementing the EU or Euratom budget); in particular, indirect costs if the beneficiary is already receiving an operating grant financed by the EU or Euratom budget in the same period, unless they can demonstrate that the operating grant does not cover any costs of the action.
(m) costs for staff of a national (or local) administration, for activities that are part of the administration’s normal activities (i.e. not undertaken only because of the grant);
(n) costs (especially travel and subsistence costs) for staff or representatives of EU institutions, bodies or agencies.

Further details are included in the model grant agreement.

➢ **Calculation of the final grant amount**

The final amount of the grant to be awarded to the beneficiary is established after completion of the action, upon approval of the request for payment containing the following documents:

- a final report providing details of the implementation and results of the action;
- the final financial statement must detail all eligible costs (actual costs, unit costs and flat-rate costs);
- a certificate on the financial statements of the action for each beneficiary, if
  -- it requests an EU contribution of EUR 325 000 or more as reimbursement of actual costs and
  -- the maximum EU contribution indicated, for that beneficiary in the estimated budget (see Annex 2) as reimbursement of actual costs is EUR 750 000 or more.

In the event of non-execution or clearly inadequate execution of an activity planned in the work programme annexed to the grant agreement, the final grant will be reduced accordingly.

EU grants may not have the purpose or effect of producing a profit within the framework of the action. **Profit shall be defined as a surplus, calculated at the payment of the balance, of receipts over the eligible costs of the action**, where receipts are limited to the Union grant and the revenue generated by that action. In this respect, where a profit is made, the EASME shall be entitled to recover the percentage of the profit corresponding to the Union contribution to the eligible costs actually incurred by the beneficiary to carry out the action.

The ‘final grant amount’ depends on the actual extent to which the action is implemented in accordance with the Grant Agreement.

This amount is calculated by the Agency at the payment of the balance in the following steps:

Step 1 — Application of the reimbursement rate to the eligible costs declared by the beneficiaries and approved by the Agency.

Step 2 — Limit to the maximum grant amount.

Step 3 — Reduction due to the no-profit rule as the grant must not produce a profit\(^{19}\):

\(^{19}\) Not applicable for low value grants.
‘Profit’ means the surplus of the amount obtained following Steps 1 and 2 plus the ‘action’s total receipts’ (being the consolidated total receipts generated during its duration), over the ‘action’s total eligible costs’ (being the consolidated total eligible costs approved by the Agency).

The following are considered ‘receipts’:

(a) income generated by the action;

(b) financial contributions given by third parties to the beneficiary, specifically to be used for costs that are eligible under the action.

The following are however not considered ‘receipts’:

(a) financial contributions by third parties, if they may be used to cover costs other than the eligible costs;

(b) financial contributions by third parties with no obligation to repay any amount unused at the end of the action period.

If there is a ‘profit’, it will be deducted in proportion to the final rate of reimbursement of the eligible actual costs approved by the Agency (as compared to the amount calculated following Steps 1 and 2).

Step 4 — Reduction due to substantial errors, irregularities or fraud or serious breach of obligations (calculated in proportion to the seriousness of the errors, irregularities or fraud or breach of obligations) from the maximum grant amount.

The final grant amount will be the lower of the following two:

- the amount obtained following Steps 1 to 3 or
- the reduced grant amount following Step 4.

Further details are included in the model grant agreement.

12.3 Payment arrangements:

Pre-financing payment

A pre-financing payment corresponding to 70% of the grant amount will be transferred to the beneficiary within 30 days of the date when the last of the two parties signs the agreement, provided all requested guarantees have been received.

Final payment

EASME will establish the amount of the final payment to be made to the beneficiary on the basis of the calculation of the final grant amount (see section 12.2 above). If the total of earlier payments is higher than the final grant amount, the beneficiary will be required to reimburse the amount paid in excess by EASME through a recovery order.

12.4 Pre-financing guarantee

In the event that the applicant's financial capacity is not satisfactory, a pre-financing guarantee for an amount not exceeding the amount of the pre-financing and shall be valid for a period sufficiently long to allow it to be activated, may be requested in order to limit the financial risks linked to the pre-financing payment.

The financial guarantee, in euro, shall be provided by an approved bank or financial institution established in one of the Member State of the European Union. When the beneficiary is established
in a third country, the authorising officer may agree that a bank or financial institution established in that third country may provide the guarantee if he considers that the bank or financial institution offers equivalent security and characteristics as those offered by a bank or financial institution established in a Member State. Amounts blocked in bank accounts shall not be accepted as financial guarantees.

The guarantee may be replaced by a joint and several guarantee by a third party or by a joint guarantee of the beneficiaries of an action who are parties to the same grant agreement.

The guarantee shall be released when the pre-financing is deducted from interim payments or payments of the balance to the beneficiary, in accordance with the conditions laid down in the grant agreement.

13. REPORTING REQUIREMENTS:

Beneficiaries will be requested to submit the following report:

- A final technical and financial report, linked to the request for the payment of the balance.

Further details are included in the model grant agreement.

14. PUBLICITY

14.1 By the beneficiaries

Beneficiaries must clearly acknowledge the European Union’s contribution in all publications or in conjunction with activities for which the grant is used.

In this respect, beneficiaries are required to give prominence to the name and emblem of the European Commission on all their publications, posters, programmes and other products realised under the co-financed project.

To do this they must use the text, the emblem and the disclaimer in accordance with the details provided in the grant agreement.

If this requirement is not fully complied with, the beneficiary’s grant may be reduced in accordance with the provisions of the grant agreement.

In addition to the text and logo relevant to the EU programme, EASME will provide beneficiaries with a disclaimer stating that the EU is not responsible for the views displayed in the publications and/or in conjunction with the activities for which the grant is used.

14.2 By EASME

With the exception of scholarships paid to natural persons and other direct support paid to natural persons in most need, all information relating to grants awarded in the course of a financial year shall be published on an internet site of the European Union institutions no later than the 30 June of the year following the financial year in which the grants were awarded.

EASME will publish the following information:

- name of the beneficiary
- address of the beneficiary when the latter is a legal person, region when the beneficiary is a natural person, as defined on NUTS 2 level\textsuperscript{20} if he/she is domiciled within EU or equivalent if domiciled outside EU,

- subject of the grant,

- amount awarded.

Upon a reasoned and duly substantiated request by the beneficiary, the publication shall be waived if such disclosure risks threatening the rights and freedoms of individuals concerned as protected by the Charter of Fundamental Rights of the European Union or harm the commercial interests of the beneficiaries.

15. \textbf{DATA PROTECTION}

The reply to any call for proposals involves the recording and processing of personal data (such as name, address and CV). Such data will be processed pursuant to Regulation (EU) 2018/1725 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data \textsuperscript{21}. Unless indicated otherwise, the questions and any personal data requested that are required to evaluate the application in accordance with the call for proposal will be processed solely for that purpose by the EASME Head of Unit A.1. Details concerning the processing of personal data are available on the privacy statement at:  


Personal data may be registered in the Early Detection and Exclusion System (EDES) should the beneficiary be in one of the situations mentioned in Articles 136 and 141 of the EU Financial Regulation 2018\textsuperscript{22} (for more information see the Privacy Statement on:  


16. \textbf{PROCEDURE FOR THE SUBMISSION OF PROPOSALS}

Proposals must be submitted in accordance with the requirements of section 5 and by the deadline specified under section 3.

- Electronic submission


No modification to the application is allowed once the deadline for submission has elapsed. However, if there is a need to clarify certain aspects or for the correction of clerical mistakes, EASME may contact the applicant for this purpose during the evaluation process.

Applicants will be informed in writing about the results of the selection process.


\textsuperscript{22} https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32018R1046.
Contacts

EASME is available to answer questions relating to the content of the present call for proposals. All questions must be sent by e-mail to EASME-COSME-SOCIAL-ECONOMY-MISSIONS@ec.europa.eu;


17. ANNEXES:

Model grant agreement

Guide for applicants (available at the call publication website)

For the submission of proposals (Submission set):

-Template for Description of the Action (Technical Annex 1)

-Template for the detailed budget (Technical Annex 2)