WELCOME

European Social Economy Missions

SMP-COSME-2023-RESILIENCE

INFO SESSION
9 November 2023

Background, policy context and scope

Alberto LICCIARDELLO

Policy Officer, DG GROW

EU Policy background

European Green Deal: EU first climate neutral continent by 2050 ➔ Role of rural areas

2020: European **Industrial Strategy:** ecosystem-based approach

2021: **Updated** Industrial Strategy - Accelerating **twin transitions** of 14 industrial ecosystems

2021: Launch a **transition pathway for the "Proximity and social economy"** ecosystem

2021: SEAP – "*Building an economy that works for people:* an [action plan for the social economy](#)" - Building on the 2011 **Social Business Initiative** and the 2016 **Start-up and Scale-up Initiative**.

■ Point 3.4 of the Social Economy Action Plan: enable social entrepreneurs to develop innovative business practices to boost rural growth and competitiveness

➔ goals of the **Long Term Vision for Rural Areas**.

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Overall objectives

Social Economy Missions

- accelerate the **development and acknowledgement of social economy** via inter-regional learning and collaboration

- contribute to a European **Social Economy community** and boosting innovation efforts, sustainable growth and creation of high-value jobs

General objective of the call 'Resilience'

Boosting local social economy businesses to make rural Europe stronger, connected, resilient and prosperous

- boosting the development of social economy SMEs active in rural areas
- building a network of regional and local authorities with converging priorities on social economy
- creating opportunities at EU level for learning and collaboration

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Specific objectives of the call

- Take stock of main **recommendations and good practices** from previous projects on SE and resilience of rural communities;

- Foster the creation of **social economy networks** and stakeholders at regional and local level to boost resilience and the twin transition;

- Improve **collaboration** between existing SE networks;

- Boost **inter-regional learning** between SE stakeholders (public and private sector);

- Contribute to establish a **social economy community**

  - focus on rural communities' resilience

  - development of social entrepreneurship

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Type of applicants targeted

- **Regional/local authorities** and related entities coordinating regional/local policies in the field social economy (SMP countries)

- **Territorial delegations** composed of a broad variety of actors, such as:

  - social enterprises;

  - cooperatives;

  - business organisations;

  - social economy organisations;

  - civil society organisations etc.

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Themes and priorities

1. Building clusters of social innovation and ecological innovation in rural areas

2. Boosting green, and digital transition through social economy in rural areas

3. Fostering social entrepreneurship, including for sustainable agriculture and food systems

4. Reinforcing education, training and skills development activities for unemployed people in rural areas, in particular youth and women

5. Developing the New European Bauhaus and quality of life in rural environment

Other relevant theme

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Scope of activities

Activity 1) Preliminary overview of existing projects (recommendations and good practices)

Activity 2) Minimum of three transnational workshops and learning activities

- between 15-20 travelling participants (regional/local governments and social economy stakeholders)

- members of delegations (not consortia members) ➜ third party costs.

- additional workshops, webinars, peer-to-peer learnings, etc.

Activity 3) Collecting of good practices and developing recommendations for replication

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Possible additional activities (not mandatory)

- **Communication** and awareness raising

- **Organisation of activities** to boost cooperation, transnational and inter-regional learning and capacity building

- **Mapping of specific needs** of social economy enterprises and support measures to improve their sustainable development and growth

- **Mapping of relevant initiatives**, guidelines, good practices, main players, providers of green, digital solutions and new technologies

- **Developing of digital solutions**, platforms for knowledge and expertise sharing, and local community involvement

- **Elaboration of a local Social Economy Action Plan** for rural communities' resilience

- **Other activities** in line with the objectives of the call

Performance indicators

Activity 2

- Number of transnational missions organised (minimum 3 per project)

- Number of travelling participants (minimum 15 per mission)

- Rural stakeholders involved, in particular rural social enterprises (number, geographical and typology variety)

- Number of new inter-regional partnerships initiated

- Number of Social Economy business and SMEs that participated in the missions

- Diversity of partners from different industrial ecosystems

Activity 3

- Number and quality of collected good practices

- Number of recommendations for replication

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Expected results and potential impact

- to increase high-quality employment and to tackle rural unemployment;

- to support the green, social and digital transition at rural level;

- to support resilient and sustainable rural business models based on social economy values;

- to boost the efficient use of resources by moving to a circular economy;

- to ensure more community resilience and better living conditions for the rural population.

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General information on the call for proposals

Marta NUCHE CASTELLANOS

Call Coordinator, EISMEA

Call Basics

- Call Title: "European Social Economy Missions" (SMP-COSME-2023-RESILIENCE) ⇨ [Call document](#)

- Call budget: **EUR 1 000 000**

- Maximum grant per project: **EUR 250 000** ⇨ 4 projects

- Project duration: **18** or **24 months** (as of June 2024)

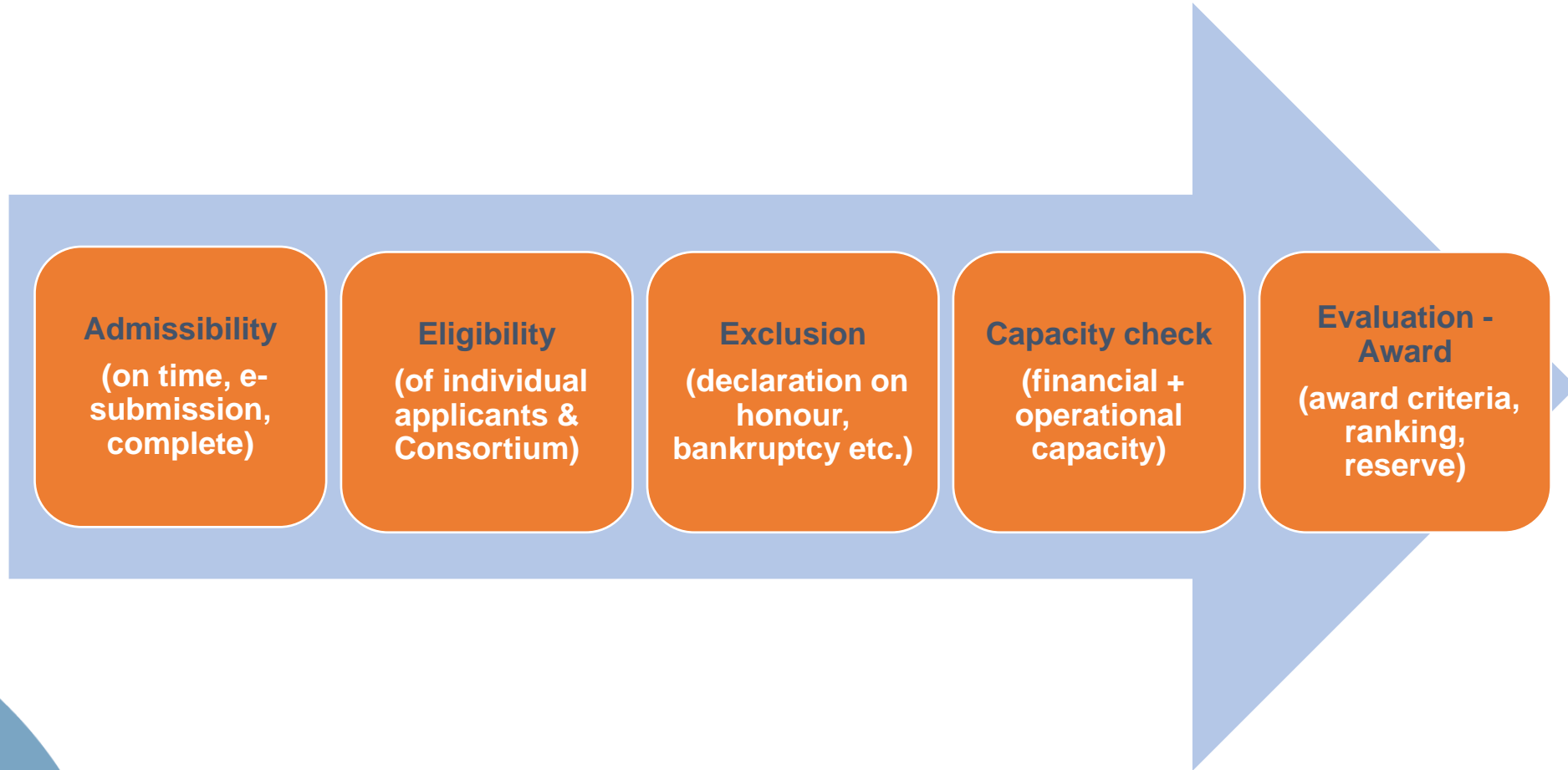- Electronic submission: [Funding and tenders portal](#)

Indicative Call Timeline

💡 05 October 2023: Call published

⬇ **07 December 2023, 17:00 CET**: **Deadline for submission of proposals**

⬇ December 2023 - February 2024: **Evaluation** period

⬇ March - May 2024: **Grant preparation**

⬇ June 2024: **Signature** and project **start**

⬇ 18-24 months: **Implementation** (continuous reporting)

🎯 November 2025 – May 2026: Final reporting and payment

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Applicants / Participants

- **Beneficiaries** (receive EU funding for task execution, must be registered/validated)

- **Affiliated entities** (entities linked to a beneficiary; do not sign Grant agreement but receive EU funding so must be registered/validated, but <u>do not count to minimum eligibility criteria of the Consortium!</u>)

- **Associated partners** (not formal recipients of EU funding but must be registered)

- **Subcontractors** (limited part, never for core tasks, indicated in application form)

- **Third parties giving in-kind contributions** (not formal recipients of EU funding)

  Proposals must be submitted by a **Consortium of applicants** (beneficiaries, not affiliated entities)

  One applicant must be appointed as **coordinator** of the Consortium

Before submitting the application, all beneficiaries, affiliated entities and associated partners must be registered in <u>the Participant Register</u>. See <u>here</u> how to register your organisation

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Process

Admissibility (on time, e-submission, complete)

Eligibility (of individual applicants & Consortium)

Exclusion (declaration on honour, bankruptcy etc.)

Capacity check (financial + operational capacity)

Evaluation - Award (award criteria, ranking, reserve)

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Admissibility requirements

- Electronic submission via the [Funding and tenders portal](#)

- Before the deadline: **07 December 2023, 17:00 CET**

- Applications must be **readable, accessible and printable** [Upload only PDFs and careful with Detailed budget table when transferred into PDF!]

- Applications must be **complete**:

    - Application Form Part A (*filled in online*)

    - Application Form Part B (*[template](#) available in Submission System, **max 50 pages***) <u>and annexes</u>:

        - Detailed budget table *([template](#) available in Submission System)*

        - List of previous key projects for the last 4 years *(template available in Part B)*

        - Annex 5 = Eligibility checklist (*available from [EISMEA's page](#)*) - to be uploaded under 'Other annexes' field.

    More info on submission process: [Online Manual](#).

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Electronic submission

- [Application forms](#) … via [Funding and tenders portal](#)

Please select the type of your submission:

○ SMP Grants for Financial Support [SMP-GFS], SMP Action Grant Budget-Based [SMP-AG]

Start submission

- **Part A = Administrative Forms** = filled in online:
    1) General information incl. proposal's abstract + declarations on behalf of the Consortium partners
    2) Administrative data of participating organisations
    3) Budget for the proposal (per partner: total estimated eligible costs and requested grant in EUR).

- **Part B** = templates filled in, turned into PDF and uploaded:
    - **Technical description** (*Application form [template](#) in the Submission System, max 50 pages*) + **ANNEXES:**
    ➢ Detailed budget table (*[template](#) available in the Submission System: file 'Tpl_Detailed Budget Table (SMP COSME GFS **90**)'*)
    ➢ List of previous key projects for the last 4 years (*template available as section in Application Form Part B*)
    ➢ Annex 5 = Consortium eligibility checklist (*template available from [EISMEA's page](#)*).

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Administrative forms (Part A)

Edit forms ✏️ | **View history** | **Print preview** ❶

Download Part B templates

⬇️ Download part B templates

Name
- 📊 Tpl_Detailed Budget Table (SMP COSME).xlsm
- 📊 Tpl_Detailed Budget Table (SMP COSME GFS 90).xlsm
- 📊 Tpl_Detailed Budget Table (SMP COSME GFS 75).xlsm
- 📄 Tpl_Application Form (Part B) (SMP COSME).rtf

Part B and Annexes

In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments. ❶

Part B *		❶	Upload ☁️
Detailed budget table *		❶	Upload ☁️
~~CVs~~		❶	Upload ☁️
~~Annual activity reports~~		❶	Upload ☁️
List of previous projects	Already included in Part B	❶	Upload ☁️
Other annexes	Consortium eligibility checklist	❶	Upload ☁️

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Consortium eligibility checklist

Section 1: Selection of theme

Please select maximum 1 theme from the below list.

- ☐ 1. Building clusters of social innovation and ecological innovation in rural areas
- ☐ 2. Boosting green, and digital transition through social economy in rural areas
- ☐ 3. Fostering social entrepreneurship, including for sustainable agriculture and food systems
- ☐ 4. Reinforcing education, training and skills development activities for unemployed people in rural areas, in particular youth and women
- ☐ 5. Developing the New European Bauhaus and quality of life in rural environment
- ☐ 6. Other relevant theme
  - o Please specify:...

Section 2: Eligibility Sheet

Form on compliance with the specific criteria for eligible consortia as outlined in section 6 of the Call for proposals[1]

To be completed for all the organisations participating in the Consortium.

Proposal ID & Acronym: ....

Applicant – *list ALL the Consortium applicants' short names and indicate the coordinator in brackets*	Country	Regional or local public government *Insert YES or NO*	Business related organisation *Insert YES or NO and add type in brackets*	Other economic operator *Insert YES or NO and add type in brackets*
1.[coordinator]				
2.				
3.				
4.				
5.				
Add rows if necessary				

Annex 5 = Consortium eligibility checklist (*template available from EISMEA's page*)
⇨ **FILL IT IN to demonstrate your Consortium eligibility and to select the action area** and upload under 'Other annexes' field

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Eligibility requirements – applicants

Applicants (beneficiaries and affiliated entities) <u>must be</u>:

- legal entities (public or private bodies)

- established in an eligible country (EU Member States, Ukraine (territories controlled by the Government of Ukraine at submission deadline and [countries participating in the Single Market Programme](#))

For more information see Section 6 of the [Call Document](#)

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Eligibility requirements - Consortium

Proposals must be submitted by a consortium of minimum 4 and up to around 10 applicants (**beneficiaries; not affiliated entities**), which complies with all following conditions:

(a) at least three **regional or local public governments** (such as regions, municipalities, cities, etc.) validated as public entities in the Participant Register from at least **three different eligible countries**;

(b) at least one **business related organisation** such as SMEs organisation or association, social enterprises organisation, chamber of commerce, etc. relevant for this call topic;

(c) additional applicants can be other economic operators such as network or umbrella organisations, SMEs organisations, SMEs, social economy organisations or enterprises, cooperatives, NGOs, civil society organisations, local rural development and innovation agencies, technology centres and service providers, digital innovation hubs, fablabs, science parks, local industrial clusters, educational institutions, educational or vocational training organisations, chambers of commerce, etc. relevant for this call topic;

(d) each eligible applicant under (b) and (c) in the consortium must be established in the same territory covered by the regional or local public administration participating as applicant under (a), except in case of participating network or umbrella organisations*.

*A country in which a participating network or umbrella organisation is established does not have to be represented by its regional or local public administration.
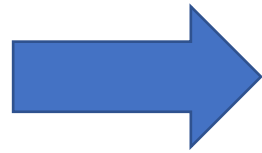
See Section 6 of the Call Document

Financial capacity
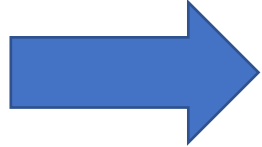
For details see **Section 7** of the [Call document](#)

Financial capacity: stable and sufficient resources needed to successfully implement the project ⇨ check to be carried out on the basis of docs 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.).*

More [info](#) on financial capacity assessment

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Operational capacity + Exclusion

For details see **Section 7** of the [Call document](#)

- **Operational capacity: know-how, qualifications** and **resources** needed to successfully implement the project ⇨ to be assessed under 'Quality' award criterion (competence and experience of the applicants and their project teams ⇨ staff profiles, participants description, list of previous projects etc.)

- **Exclusion**: see exclusion situations in Section 7 of the Call document

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Key mandatory elements

- **Project budget:** EUR 250 000

- **Project length: 18** or **24 months**

- **Mandatory activities: 1/** Preliminary overview of existing projects; **2/** Three transnational workshops and learning activities; **3/** Collecting of good practices and developing recommendations for replication.

- **Financial Support to Third Parties (FSTP):** can be directed to provide financial support for the travel, accommodation, and subsistence costs for third parties to participate in the transnational workshops organised by the consortium.

- **Mandatory call indicators: all to be covered ⇨ two** with mandatory minimum to be achieved.

For more information on FSTP see Sections 2 and 6 of the Call Document

Evaluation procedure

- Proposals passing admissibility and eligibility check ⇨ evaluation **based on award criteria**.

- **Evaluation committee** (assisted by independent external experts) will assess all applications and create their **ranking**.

- All proposals will be informed about the evaluation result (**evaluation result letter**) at the end of evaluation period.

- Successful proposals will be invited to Grant Agreement preparation process (**GAP**); the other ones will be put on the **reserve list** or rejected.

More details in section 8 of the [Call Document](#)

Award criteria & thresholds

- **Relevance:** clarity and consistency of project, objectives and planning, extent to which they match the call priorities/objectives; EU context, transnational dimension, potential of cross-border cooperation

- **Quality:**

  - **Project design and implementation** – technical quality; logical links between the identified problems, needs and solutions proposed (logical frame concept); methodology for implementing the project (concept and methodology, management, procedures, timetable, risks and risk management, monitoring and evaluation); feasibility of the project within the proposed time frame; cost effectiveness (sufficient/ appropriate budget for proper implementation; best value for money)

  - **Project team and cooperation arrangements** – quality and expertise of Consortium and project team, partners' role/contribution, procedures/problem-solving mechanisms

- **Impact:** credibility, ambition, expected long-term impact of results on target groups/general public, dissemination strategy, sustainability, use of results in other countries, Key Performance Indicators (KPIs)

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**

More details in section 9 of the Call Document

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Tips and tricks for successful proposal 1

- **Read carefully the [Call document](#) & [FAQs](#).** Get to know/prepare templates & annexes.

- **Think like / write for an evaluator: focus / address all award criteria and their elements -** you will be assessed on them.

- **Structure the info** (50-page limit!) – be specific, stay in scope, use quantification and clear presentation of the planned work/tasks, be consistent across the proposal. Write in reader-friendly manner. Avoid long sentences/descriptions & abbreviations.

- **What makes your project special?** Do not repeat what is in the call but describe your proposal's **specific contribution / particular idea.**

- **Check completeness** of your proposal - remember about annexes – do not forget **Annex 5**!

- **Submit earlier** = do not wait until the last minute with the submission.

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Tips and tricks for successful proposal 2

- **Build detailed and complete budget** – it must reflect deliverables / activities / description in the proposal.

- Prepare **cost-effective budget** – budgetary items must be necessary for the project execution.

- Clearly describe **division of tasks and responsibilities** between partners in the Consortium.

- Remember that – if successful – **you will need to execute this in practice** - we evaluate the proposals as they are so write as if no further improvements can be made.

- Success = setting **ambitious but realistic goals**.

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Tips and tricks for successful proposal 3

- **Find your partners & build a collaborative Consortium**:

  ➢ partner search [database](#) on Funding & tenders portal + Enterprise Europe Network Cooperation Opportunities [Database](#)

  ➢ include partners only upon their **consent**

  ➢ **consult experienced /** former applicants.

- **Get support**:

  ➢ [IT Helpdesk](#) for forgotten passwords, access rights / roles, technical aspects of submission of proposals, etc.

  ➢ [Online Manual](#) for applying via Funding & tenders portal

  ➢ EISMEA-SMP-COSME-ENQUIRIES@ec.europa.eu for non-IT related questions (to be sent by 30 November 2023) ⇨ replies in [FAQ](#)

  See section 12 of the [Call Document](#)

REA Central Validation Service: Registration of participants

Radu SORA

Team leader – Validation planning, REA

Presentation Outline

1. Registration of participants

2. REA Central Validation Service

3. Communication

4. Guidance documents

Registration of an organisation (at proposal stage)

Participant Register

Need help?

If you want to participate in a call for proposals or in a call for tenders with eSubmission, your organisation needs to be registered and have a 9-digit Participant Identification Code (PIC). Please quote your PIC in all correspondence with the Commission.

The register contains all participants of EU programmes.

Is your organisation already registered? PIC search

Please check whether your organisation has already been registered. If so, no need to register it again.

Search a PIC

Register your organisation

To register your organisation or as a natural person, you need to login into the Portal or, if you are a new user, create your account.

Check what information you need to register in the Online Manual - and keep it to hand during the registration procedure. To start registration, click on the button below.

Register your organisation

Search for a registered organisation

New registration

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How to register in the Participant Register

Participant 's Register

① Identification — ② Organisation Data — ③ Legal Information — ④ Authorised Users — ⑤ Summary — ⑥ Success

Identification

Legal name *	Legal name	240
Registration country *	Registration country	
Registration number	Registration number	50
VAT number *	VAT number	20 / not applicable
		500

Review the Form   Next

Identification (duplicate check)

(e.g. Legal name, VAT number)

↓

Organisation data

↓

Legal information

↓

Authorised users

(e.g. Name, e-mail address of the self-registrant and the back-up)

←

Registration completed

↓

New Participant Identification Code (PIC) in a "declared" status

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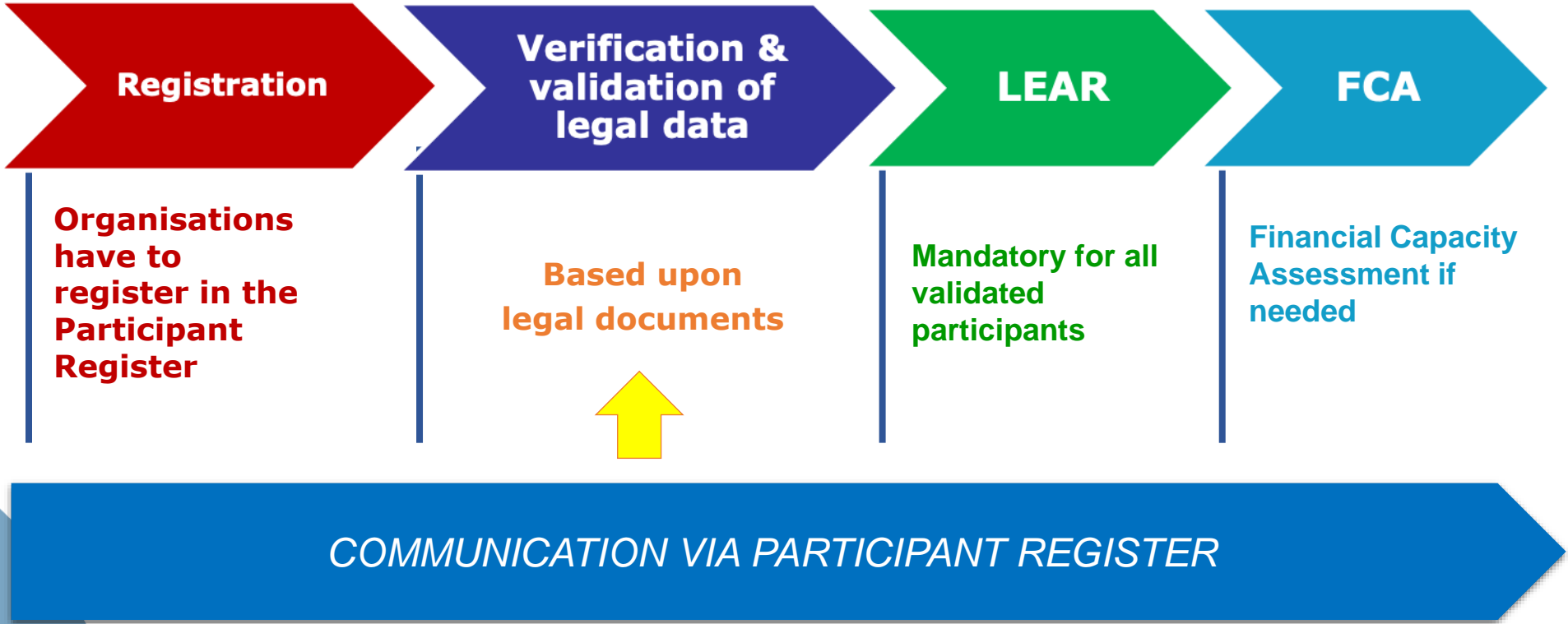
REA Central Validation Service (REA CVS)

- Verifies **legal existence and legal statuses** of entities

- Validates the appointment of **Legal Entity Appointed Representatives (LEARs)**

- Validates **legal changes** of validated entities

- Assesses **universal takeovers (UTROs)** of validated entities

- Creates **Legal Entities and Bank Account Files**

- Prepares the **Financial Capacity Assessment** for RAO

- Performs **ownership control analyses** for specific programmes

- Performs ex-post status verifications (e.g. **SME & MID cap status checks**)

Legal validation

- Registration data is verified by REA Central Validation Service before the signature of the Grant Agreement or Contract

- The legal validation of a participant in the Single Electronic Data Interchange Area (SEDIA) is done once, when the entity has to sign its first Grant Agreement or Contract

- It is reused for future participations in EU grant and procurement actions

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Validation Rules

- Validation is always performed on the basis of supporting documents, in accordance to EU Financial Regulation and the [Rules on Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment](#) for EU Grants and Tenders

- Validation is required for all beneficiaries and affiliated entities

- PICs of affiliated entities, frequently included in the consortium during the GAP, must be introduced in the Funding & Tenders Portal's Grant Management Service System

Legal Entity Validation Documents

✓ **Legal Entity Form** (template to be completed, dated, stamped and signed)

✓ **VAT extract** (< 6 months)
   ✓ *If not registered for VAT –* ***proof of VAT exemption***

- **Registration extract** (<6 months) – for private law bodies
- **Law/decree/decision** – for public law bodies
- **Treaty** – for international organisations
- **Statutes** – for non-profit organisations

✓ **Financial Identification Form** (if BAF requested)

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Communication

(e.g. request to submit legal documents or to appoint a LEAR)

All communication to -and from- participants is exclusively managed **through the Participant Register**

European Commission <EC-NO-REPLY-GRANT-MANAGEMENT@nomail.ec.europa.eu>
to me ▾

Europa / Funding & Tenders Portal notification

Dear User,

You have been granted the role of **Self Registrant** for the organisation arquicios.

In order to access your organisation data on the Funding & Tenders Portal/Supplier portal, you need to log in on the F&T Portal/Supplier Portal. If you did not have an EU Login yet, it was launched automatically for a separate e-mail with a hyperlink to finalise your account.

For more information on the Funding & Tenders Portal roles, please refer to the Online Manual if you participate in the programmes managed on the Funding & Tenders Portal.
For more information on the roles for e-Procurement, please refer to the e-Procurement wiki page, if you participate in a tender call.

With kind regards,
EU Single Electronic Data Interchange Area - F&T Portal team

This email has been auto-generated. Please do not reply to this account. Your email will not be read. For any inquiries please contact the Grants Procurement Systems Support +32 (2) 29 71063 or EC-FUNDING-TENDER-SERVICE-DESK@ec.europa.eu.

Messages are notified via e-mail to the contact person (i.e. self-registrant or the appointed LEAR)

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Lost access – PIC account

Declared/Non valid PIC

- In case the self-registrant left the organisation and no one has access to a non-valid PIC – a new PIC needs to be created and REA CVS informed

Valid PIC

- If the LEAR is not available anymore and there are no Account Administrators, a new LEAR needs to be appointed – LEAR recovery procedure

https://ec.europa.eu/research/participants/urf/lear-recovery/request/

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Guidance documents

- Rules on Legal validation, LEAR appointment and financial capacity assessment:
  https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/rules-lev-lear-fca_en.pdf

- How to register in the Participant Register:
  https://webgate.ec.europa.eu/funding-tenders-opportunities/display/OM/Online+Manual

- Online Manual, IT How to, IT and RES Helpdesk and specific FAQs on the Funding and Tenders Portal:
  https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/support

- Legal notice on the Funding and Tenders Portal (terms and conditions, data protection):
  https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/legalnotice

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Financial provisions

Jana DOBIASOVA

Financial Officer, EISMEA

Financial documents for submission

- **Summarised budget table** (Application Form Part A – manually filled online)

- **Detailed budget table** (Annex to Application Form Part B – template to be uploaded in allowed format)

  - financial data in both tables need to match – if not, Summarized budget table takes precedence

  - no paper (hard copy) submission – all submission is online!
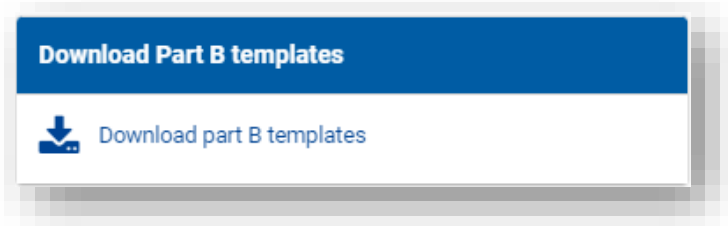
Download Part B templates

⬇ Download part B templates

Part B and Annexes

In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments. ❓

Part B

[   ] ❓ | Upload ☁ |

Detailed Budget Table

[   ] ❓ | Upload ☁ |

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Detailed budget template

- Introductory pages (not to be submitted)

- **Sheet 2. Start** – fill in the project data and add the WPs -> update table

- Submit only sheets 3, 4 & 5

Detailed budget template

Sheet 3. Detailed table

- **Complete 1 Detailed budget table per each member or affiliated entity! HOW?**

- If no cost in a certain category – box to be left empty

- Eligible costs only

- List each item only once

- List each cost in its main WP section

- Use your (best) estimates

- White cells: data to enter / Blue cells: auto-calculated

Detailed budget template

Sheet 4. Consolidated table per participant

- Shows different cost headings per work package

- Upon correct entry of data in the Detailed table this table is automatically calculated by the system

Sheet 5. Consolidated table per project

- Shows costs per work package/ per participant

- To be manually filled in by the Coordinator

- Must match financial data entered and automatically calculated in other tables and budget in Part A

Detailed budget table – per beneficiary

Project costs

- A. Personnel costs

- B. Subcontracting

- C. Purchase costs

- D. Other cost categories

- E. Indirect costs

Project income

- EU contribution

- Revenues and contributions by third parties

- Own resources

A. Personnel costs

A.1 Employees (or equivalent)

- **Eligible personnel**: employment contract (or equivalent) with the beneficiary + assigned to the action;

- **Eligible costs**: salaries, social security contributions, taxes and other costs linked to the remuneration (if arise from national law or the employment contract + **actually incurred**).

- **Calculation**: daily rate for the person x number of day-equivalents worked on the action

  - **Daily rate**: annual personnel costs for the person / 215 days

- Monthly rates for each person who will work on the action to be presented in the Detailed budget table.

A.2 Natural persons under a direct contract and A.3 Seconded persons

- **Natural persons under direct contract** (not employment): civil, free-lance or expert, eligible if:

  - Works under similar conditions as employees (supervision, office presence, etc)

  - Costs are not significantly different from those for personnel performing similar tasks

  - Work results belong to the beneficiary

  - Costs declared amount solely to remuneration + taxation costs for the person in question

- **Seconded persons** by a third party against payment

A. Personnel costs

A.4 SME owners and natural persons without salary

- **SME owners** are **eligible** if:

  - Owner/co-owner + beneficiary of the action + SME + not receiving a salary;

  - SME status declared in the Portal

- **Natural person beneficiaries**: beneficiaries that are natural persons not receiving a salary

- **Cost calculation method:**

  - Unit cost (daily rate)   x   number of day-equivalents worked on the action

  - Unit cost (daily rate) to be used: Commission Decision C(2020)7715* or Annex 2a

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)

The country-specific correction coefficients

ANNEX 2a

ADDITIONAL INFORMATION ON UNIT COSTS AND CONTRIBUTIONS

SME owners/natural person beneficiaries without salary (Decision C(2020) 7115[1])

<u>Type</u>: unit costs

<u>Units</u>: days spent working on the action (rounded up or down to the nearest half-day)

<u>Amount per unit (daily rate)</u>: calculated according to the following formula:

{EUR 5 080 / 18 days = **282,22**}
multiplied by
{country-specific correction coefficient of the country where the beneficiary is established}

The country-specific correction coefficients used are those set out in the Horizon Europe Work Programme (section Marie Skłodowska-Curie actions) in force at the time of the call (see Portal Reference Documents).

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PROJECT COSTS

A. Personnel costs

			Costs (actual costs)				Also working for other work packages? YES/NO and which WP	Description of project role/activities/responsibilities
		Type of rate (monthly/other)	Rate (amount)	Time (months/other of work on the action)	Total (EUR)			
			a	b	c = a * b			
WORK PACKAGE 1	**0**							
	A.1 Employees (or equivalent)							
	Senior experts/advisors/researchers	monthly	0,00	0,00	0,00			
	Administrative personnel	monthly	0,00	0,00	0,00			
	Senior experts/advisors/researchers	monthly	0,00	0,00	0,00			
	Other							
	[category 1]	monthly	0,00	0,00	0,00			
	[category 2]	monthly	0,00	0,00	0,00			
	Total employees (or equivalent)				0,00			
	A.2 + A.3 Natural persons under direct contract and seconded persons							
	Select a staff category	monthly	0,00	0,00	0,00			
	Select a staff category	monthly	0,00	0,00	0,00			
	Other							
	[category 1]	monthly	0,00	0,00	0,00			
	[category 2]	monthly	0,00	0,00	0,00			
	Total natural persons under direct contract and seconded persons				0,00			
	A.4 SME owners and natural person beneficiaries without salary							
	SME owners/natural person beneficiaries without salary	daily	0,00	0,00	0,00			
	Total SME owners and natural person beneficiaries without salary				0,00			
	Total personnel for this WP				0,00			

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Application Form - Technical Description (Annex 1 Part B)

2.3 Project teams, staff and experts

Project teams and staff

Describe the project teams and how they will work together to implement the project.

List the staff included in the project budget (budget category A) by function/profile (e.g. project manager, senior expert/advisor/researcher, junior expert/advisor/researcher, trainers/teachers, technical personnel, administrative personnel etc. — use the same profiles as in the detailed budget table, if any) (n/a for pre-fixed Lump Sum Grants) and describe briefly their tasks. Provide CVs of all key actors (if required).

Name and function	Organisation	Role/tasks/professional profile and expertise

B. Subcontracting

- **Purchase of goods, works or services** related to the implementation of specific tasks which are part of the action

- Autonomous - no direct supervision by the beneficiary (as opposed to in-house consultants)

- Allowed, under following conditions:

  - Described in Annex 1

  - Budgeted in Annex 2 or ex post approved

  - If above 30% of total eligible costs – must be justified in the application

  - Can be declared only as actual costs incurred

  - Best value for money or lowest price

  - No conflict of interest

B. Subcontracting costs		Costs (actual costs)		Also used for other work packages? YES/NO and which WP	Description of subcontracted project tasks/activities
WORK PACKAGE 1	0				
	1 [Subcontract short name]	0,00			
	2 [Subcontract short name]	0,00			
	Total subcontracting for this WP	0,00			

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Application Form - Technical Description (Annex 1 Part B)

Subcontracting

Subcontracting

Give details on subcontracted project tasks (if any) and explain the reasons why (as opposed to direct implementation by the Beneficiaries/Affiliated Entities).

Subcontracting — Subcontracting means the implementation of 'action tasks', i.e. specific tasks which are part of the EU grant and are described in Annex 1 of the Grant Agreement.

Note: *Subcontracting concerns the outsourcing of a part of the project to a party outside the consortium. It is not simply about purchasing goods or services. We normally expect that the participants have sufficient operational capacity to implement the project activities themselves. Subcontracting should therefore be exceptional.*

Include only subcontracts that comply with the rules (i.e. best value for money and no conflict of interest; no subcontracting of coordinator tasks).

Work Package No	Subcontract No (continuous numbering linked to WP)	Subcontract Name (subcontracted action tasks)	Description (including task number and BEN/AE to which it is linked)	Estimated Costs (EUR)	Justification (why is subcontracting necessary?)	Best-Value-for-Money (how do you intend to ensure it?)
	S1.1					
	S1.2					

Other issues:			
If subcontracting for the project goes beyond 30% of the total eligible costs, give specific reasons.		Insert text	

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C. Purchase costs

Purchase contracts:

Ordinary contract for services, works (i.e. buildings) or goods (e.g. equipment), needed to carry out the action, including the purchase of consumables and supplies

- The contracts DO NOT cover the implementation of action tasks, but they are necessary to implement action tasks by beneficiaries

- Do not have to be indicated in Annex 1

Sub-categories:

C.1 Travel costs and related subsistence allowances

C.2 Equipment

C.3 Costs of other goods and services

C.1 Travel, accommodation and subsistence

Eligibility rules:

- Budgeted only for the personnel working on the action

- Be justified: necessary under the action, planned in the description of the action, supported by the relevant documents, made following the usual practice of the beneficiary

- Must be budgeted as **UNIT costs** using the values from the [Commission Decision C(2021)35, as amended by Commission Decision C(2023)4928](#)

    → Calculations for travel costs are made on the basis of the distance between the departure and arrival point → [Flight and rail calculator](#) to be used

    → Accommodation and subsistence rates are fixed per each country

    → Actual (incurred) costs only if the particular instance of travel is not covered in the EC Decision

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C. Purchase costs

C.1 Travel and subsistence

	Costs (actual costs)	Costs (unit cost)			Also part of other work packages? YES/NO and which WP	Description (e.g. international/not international; place of activity/destination; number of days; number of persons (speakers, personnel and participants whose costs will be covered); transport means; average price per person; subsistence costs/daily allowances)
		Amount per unit	Number of units	Total (EUR)		
WORK PACKAGE 1	0					
	Example: Consortium meetings					
Speakers						
Travel costs	0,00	0,00	0,00	**0,00**		
Accomodation costs	0,00	0,00	0,00	**0,00**		
Subsistence costs	0,00	0,00	0,00	**0,00**		
Personnel						
Travel costs	0,00	0,00	0,00	**0,00**		
Accomodation costs	0,00	0,00	0,00	**0,00**		
Subsistence costs	0,00	0,00	0,00	**0,00**		
Participants						
Travel costs	0,00	0,00	0,00	**0,00**		
Accomodation costs	0,00	0,00	0,00	**0,00**		
Subsistence costs	0,00	0,00	0,00	**0,00**		
Total travel costs for this travel	**0,00**					
Total accomodation costs for this travel	**0,00**					
Total subsistence costs for this travel	**0,00**					
Total travel	**0,00**					
Total travel costs for this WP	**0,00**					
Total accomodation costs for this WP	**0,00**					
Total subsistence costs for this WP	**0,00**					
Total travel for this WP	**0,00**					
WORK PACKAGE 2	0					

C.2 Equipment

- New or second-hand
- Renting and leasing

→ Basic rule: **Depreciation**

- Eligibility: Corresponds to DURATION of the action + RATE of actual use for the action;
- Recorded in the assets register (acc. to international accounting standards or usual practice of the beneficiary)

C.2 Equipment								
WORK PACKAGE 1	0							
	C.2.1 Purchase (depreciation/full cost)							
			Costs (actual costs)				Also part of other work packages? YES/NO and which WP	Description of tasks/activities for which the equipment is needed
		Price	Depreciation method (e.g. 36 month or 60 month)	Number of months allocated to the action	Rate of use for the action (100% or less if used also for other purposes)	Total (EUR)		
		a	b	c	d	e =(c/b *d) * a		
	1 [Equipment short name]	0,00	0	0,00	0%	0,00		
	2 [Equipment short name]	0,00	0	0,00	0%	0,00		
	3 [Equipment short name]	0,00	ATTENTION! Can be used only if full cost option in the grant agreement			0,00		
			Total depreciation			0,00		
	C.2.2 Rental and leasing (rate of use/full cost)							
			Costs (actual costs)				Also part of other work packages? YES/NO and which WP	Description of tasks/activities for which the equipment is needed
		Monthly rent/fee	Number of months of use for the action	Rate of use for the action (100% or less if used also for other purposes)	Total (EUR)			
		a	b	c	d= a*b*c			
	1 [Equipment short name]	0,00	0,00	0%	0,00			

C.3 Other costs

Examples: catering, meeting room rent, leaflets printing, consumables and supplies, dissemination, translations, publications, financial statements certificates, financial guarantees, etc.

- Purchased specifically for the implementation of the action
- Best value for money or the lowest price
- Declared costs actually incurred

D.1 Financial support to third parties (FSTP)

- Costs for FSTP allowed as **actual costs**

- Maximum amount per third party **EUR 60 000**

D. Other cost categories							
D.1. Financial support to third parties							
WORK PACKAGE 1	**NAME 1**						
Financial support to third parties		Costs (actual costs)	Costs (unit cost)				
			Amount per unit	Number of units	Total		
	1 [Support scheme short name]						
	[divide scheme in parts if there are different subschemes or different unit costs, e.g. unit cost per host country]		0,00	0,00	0,00	0,00	
				Total financial support 1	0,00		
	2 [Support scheme short name]						
	[divide scheme in parts if there are different subschemes or different unit costs, e.g. unit cost per host country]		0,00	0,00	0,00	0,00	
	Total other cost category D.1 for this WP	0,00					
				Total D.1 (all WPs)	0,00		
				Total other cost categories (all WPs)	0,00		

E. Indirect costs

Running or operating costs (overheads)

- Not directly linked to the action implementation and not to be attributed directly to it

- Example: stationery, rent of the office, utilities etc.

- No breakdown of these costs is required

- **7% flat rate of Σ A. Personnel costs + B. Subcontracting + C. Purchase costs + D. Other costs (FSTP)**

E. Indirect costs		Costs (flat-rate)	
ALL WORK PACKAGES	Total estimated direct costs (on which indirect cost flat-rate is based, see GA eligibility article)	0,00	
	Flat-rate (%)	7%	ATTENTION! Check that the rate is in line with the call conditions. Put 0% if you receive an EU Operating Grant and are not eligible to charge indirect costs*
	Total indirect costs	0,00	
	Total indirect costs	0,00	
		TOTAL COSTS PARTICIPANT	0,00

Project income

EU contribution (grant): 100% for FSTP and 90% for all other cost categories.

Revenues and contributions by third parties:

- **income generated by the action** such as direct revenues or receipts (e.g. conference participants fees, sales of books)

- **financial contributions FROM third parties**

Own resources or the own contribution of the beneficiary

Payment arrangements

- Signature of Grant Agreement > **Prefinancing** to start working on the project (70% of the maximum grant amount) – *automatic process*

- There will be no **interim payments**

- **Final report** > Payment of the **balance** based on the final financial report approval (additional payment or recovery)

  💡 All payments will be made to the coordinator!

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Closing

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Thank you!

For any additional information, please contact:
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