



# European Social Fund+ (ESF) Employment and Social Innovation (EaSI) strand

# Call for proposals

Annual operating grants to support EU level Social NGO Networks

ESF-2025-OG-NETW-NGO-SGA

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# **EUROPEAN COMMISSION**

Directorate-General for Employment, Social Affairs and Inclusion

EMPL.D – Social Affairs
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# **CALL FOR PROPOSALS**

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#### O. Introduction

This is a call for proposals for EU operating grants in the field of social inclusion under the European Social Fund Plus (ESF+).

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

- Regulation 2024/2509 (EU Financial Regulation)<sup>1</sup>
- the basic act (ESF+ Regulation 2021/1057<sup>2</sup>).

The call is launched in accordance with the 2025 Work Programme within the framework of the European Social Fund Plus (ESF+) and in particular its Employment and Social Innovation (EaSI) strand<sup>3</sup> and the 2025 Work Programme for the operational technical assistance at the initiative of the Commission in the framework of the European Social Fund Plus strand under shared management<sup>4</sup>, and will be managed by the European Commission, Directorate-General for Employment, Social Affairs and Inclusion (DG EMPL).

Operating grants provide general financial support to organisations whose statutory activities serve the strategic objectives of EU policies (mainly non-profit organisations, voluntary associations, foundations, NGOs or similar). They do not support a specific project (like action grants), but the annual operating budget of the organisation (or part of it). Operating grants are always mono-beneficiary grants supporting the work programme of activities of only one organisation. They follow the same rules for the grant agreements as action grants, but do not differentiate between direct and indirect costs. Receiving an operating grant may, however, have an impact on the possibility to receive the indirect costs flat-rate in EU action grants (see <u>AGA — Annotated Grant Agreement, art 6.2.E</u>).

The call covers the following **topics**:

 ESF-OG-NETW-NGO-2025-SGA — Annual operating grants to support EU level Social NGO Networks

We invite you to read the **call documentation** carefully, and in particular this Call document, the Model Grant Agreement, the <u>EU Funding & Tenders Portal Online Manual</u> and the <u>EU Grants AGA — Annotated Grant Agreement</u>.

Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union (recast) ('EU Financial Regulation') (OJ L, 2024/2509, 26.9.2024).

Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021 establishing the European Social Fund Plus (ESF+) (OJ L 231, 30.6.2021, p. 21).

Commission Decision C(2024)7778 of 11.11.2024 on the adoption of the 2025 annual work programme within the framework of the European Social Fund Plus (ESF+) and in particular its Employment and Social Innovation (EaSI) strand.

Commission Decision <u>C(2024)7423</u> of 28.10.2024 on the adoption of the 2025 annual work programme for the operational technical assistance at the initiative of the Commission in the framework of the European Social Fund Plus strand under shared management.

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

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

## 1. Background

The **Employment and Social Innovation ("EaSI") strand of the ESF+** provides funding to achieve high employment levels, fair social protection, a skilled and resilient workforce ready for the future world of work, inclusive and cohesive societies and the eradication of poverty.

In line with the operational objectives of the Employment and Social Innovation (EaSI) strand, this call will **support networking at Union level and dialogue with and among relevant stakeholders** in the policy areas of employment and social inclusion<sup>5</sup> and build up the institutional capacity of these stakeholders.

This call is linked to the parallel call ESF-2025-OG-NETW-NGO-FPA for **4-year framework partnership agreements (FPAs) with EU-level networks** and organisations whose activities contribute to the implementation of the programme's objectives in the following areas: policy advice and support, analytical activities, training and capacity building, mutual learning and exchange of good practices,

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<sup>&</sup>lt;sup>5</sup> Regulation (EU) 2021/1057 - Article 4 - Specific objectives

awareness raising, information, communication and dissemination with EU added value.

**Operating grants** may be awarded every year to framework partners to finance their activities, insofar as these are in line with the programme's objectives in the area concerned and the policy priorities that may be established by the Commission. The costs of general administrative expenditure necessary for the running of these organisations may also be covered.

This call aims to award **operating grants for 2026** to partners that have first signed a framework partnership agreement.

# 2. Objectives — Themes and priorities — Activities that can be funded — Expected impact

Objectives (expected outcome)

With the ultimate goal of building a strong social Europe, this Call aims to:

- Promote **social inclusion and combatting poverty** by providing financial support to EU-level networks of civil society organisations active in this area at local, regional, national and transnational level. It will thereby contribute to the implementation of the **European Pillar of Social Rights (EPSR)** and its **implementing actions**, ensuring just transitions, protecting livelihoods, boosting employment, providing access to affordable high-quality social, essential and care services, reducing poverty and inequalities and creating opportunities for all;
- Support the implementation of the Commission's EU policy initiatives to put the EPSR principles into practice, notably in the area of social inclusion and combatting poverty: the European Care Strategy and the Council recommendation on access to high quality affordable long-term care, the European Child Guarantee, the Council recommendation on access to social protection for workers and the self-employed, Council recommendation on adequate minimum income ensuring active inclusion, 2020-2030 EU Roma Strategic Framework, the Action plan on Integration and Inclusion 2021-2027 and the European Platform on Combatting Homelessness. Moreover, the European Commission foresees a new Action Plan, setting further actions to implement the principles of the EPSR. The Commission monitors the progress in turning the principles of the Pillar into action through the European Semester. Civil society organisations' proposals are expected to ensure a strong link to the Semester (addressing challenges identified in the country reports and implementing relevant country-specific recommendations);
- Deliver on the European Pillar of Social Rights is a **shared responsibility** of the EU institutions, national, regional and local authorities, social partners and civil society. **Civil society organisations** are expected to:
  - (i) support the implementation of the EPSR at EU, national and local level, notably by collecting and exchanging data and good practices, cooperating with public authorities in the design and implementation of relevant policies, and delivering specific outputs directly relevant to the EPSR's principles;
  - (ii) organise communication and engagement activities to raise awareness of the EPSR both at the EU and national levels:
- Support the Commission in implementing and disseminating new initiatives in the poverty, social inclusion and social protection areas;
- The ultimate goal is to build a **stronger social Europe**: modernise and strengthen

the welfare states to **protect people, combat poverty and inequalities**, and to face the green, digital and demographic transitions.

# Themes and priorities (scope)

The primary mission of the framework partners should be in the areas of **fostering** social inclusion and/or combatting poverty.

Applicants should implement work programmes that:

- contribute concretely and directly to the **implementation of the EPSR** principles and related initiatives that are relevant to their statutory aim, with a particular focus on national and regional/local level;
- address directly at least 1 out of 20 principles of the European Pillar of Social Rights;
- organise communication and engagement activities to raise awareness of the EPSR and promote social rights in Europe;
- strengthen the capacity of national member organisations and their national, regional and local members to enable them to actively contribute to the EPSR implementation;
- provide concrete support to the European Semester process (at EU and national levels, including through the Recovery and Resilience Plans) through monitoring of implementation of social policies and initiatives by collecting data and evidence on the ground.

The annual operating grants that could be signed based on these framework partnership agreements will **increase the capacity and capability** of the beneficiaries to contribute actively to the development and implementation of EU policies in the poverty and social inclusion areas, including with regard to enhancing access to social services.

#### Important to note:

- the inclusion of **persons with disabilities** (principle 17) should be mainstreamed across all activities. However, networks that are **mainly active in the area of disability and services for persons with disabilities** <u>should</u> apply to the upcoming **calls for proposals** funded by the programme Citizens, Equality, Rights and Values (CERV-2025-DISA-OG-FPA; CERV-2025-DISA-OG-SGA).
- networks that are **mainly active in the areas of social economy**, **social enterprise finance and microfinance** <u>should</u> apply to the upcoming **call for proposals** for action grants to support EU networks active in the areas of social economy, social enterprise finance and microfinance (ESF-2025-AG-NETW-SE-MF).

# Activities that can be funded (scope)

This call will support EU-level networks whose activities contribute to the implementation of the above-mentioned objectives, priorities and initiatives. Networks will implement, among others, activities in the areas of policy advice and support, analysis, training and capacity building, mutual learning and exchange of good practices, awareness raising, as well as information and dissemination with EU added value.

#### Activities should include:

- contributing to evidence-based regulation, policies and reforms at EU/national/local level to support EPSR implementation and providing the Commission with input for policy design, e.g. by gathering relevant evidence (especially from local levels) and by contributing to public or targeted consultations and to thematic strategic dialogue meetings on policy or programme management related issues;
- raising public awareness and disseminating information on EPSR and particularly on social protection and social inclusion policies and legislation at EU and national levels, including good practices in ensuring access to social protection and social inclusion for all, and mapping out existing gaps;
- building capacity of national members, and their national, regional and local members to actively engage them in implementing the EPSR and the related initiatives locally and in reinforcing social services provision at local and regional levels;
- assisting in the transfer and exchange of good practices (e.g. within ESF+/EaSI and other relevant EU funded programmes);
- reinforcing cooperation with other EU level networks (e.g. through joint actions), including across different policy areas; with and between the national social stakeholders; with national, regional and local authorities;
- supporting the monitoring of relevant national and regional/local level actions undertaken as part of implementation of the EU-level instruments set out in the EPSR.

#### Applicants are also encouraged to support:

- capacity building of social service providers in the Member States in the area of access to ESF+ funding.

Activities should also enable the networks to integrate **cross-cutting issues** (e.g. gender, non-discrimination) in their day-to-day work.

Applicants are encouraged to **optimise the use of online/offline activities** depending on the objectives of each activity, and taking into account **environmental and health considerations**. Possibilities offered by online activities to maximise impact should be utilised (e.g. publicly available recorded webinars). The cost-effectiveness, size and frequency of **physical events** should be carefully considered and reasonable.

## Expected impact

The Commission expects applicants to design and implement **relevant**, **quality and impactful work programmes that fit the objectives and priorities** defined in the call. The work plan should clearly demonstrate the organisation's capacity to generate **concrete impacts**.

#### Applicants should:

- provide clear descriptions of the main activities and implementation methodology (taking into account the sections: Themes and priorities — Activities that can be funded — Expected impact);
- describe the contribution and added value of the proposed work programme to the

EU policy in the area of this call;

- describe the contribution and added value of the proposed work programme to at least 1 out of the 20 principles of the European Pillar of Social Rights;
- describe their monitoring system and the way in which they use monitoring and external evaluations, in order to assess their overall performance and the relevance and impact of their outputs in relation to the objectives and conditions of this call.

The application shall include a description of evaluation methods and indicators (quantitative and/or qualitative) to monitor and verify the achievement of the main expected results. These indicators (see examples of indicators in Annex<sup>6</sup>) should be realistic, measurable and relevant. Their level of achievement or deviations thereof must be detailed and justified in the final reporting.

#### In terms of results, the Commission expects:

- Improved awareness of EU policies (EPSR in particular) and funding among the network's members;
- Increased awareness among EU and national authorities of the needs and potential of organisations represented by the networks;
- Increased capacity of the networks and their members to support policy making and implementation of the EPSR's principles;
- Enhanced research and availability of data in the fields in which the networks operate;
- Increased awareness of national, regional and local member organisations of the networks about the EU policies, initiatives and actions in the field of social inclusion and social protection.

#### 3. Available budget

The estimated available call budget is **EUR 13 250 000**.

Within the above-mentioned amount, **EUR 500 000** will be specifically dedicated to activities related to capacity building of social service providers in the Member States in the area of access to ESF+ funding.

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

#### 4. Timetable and deadlines

Timetable and deadlines (indicative)

Call opening: 5 February 2025

Deadline for submission: 15 April 2025 – 17:00:00 CET

Evaluation: April - June 2025

Information on evaluation results: July 2025

<sup>6</sup> https://ec.europa.eu/employment\_social/call\_for\_proposals/Indicators-ESF\_2024-12-09.pdf

Grant agreement signature: July - August 2025

#### 5. Admissibility and documents

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

Proposals must be submitted **electronically** via the Funding & Tenders Portal Electronic Submission System (accessible via the Topic page in the <u>Calls for proposals</u> section). Paper submissions are NOT possible.

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

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

- Application Form Part A contains administrative information about the participants (future coordinator, beneficiaries and affiliated entities) and the summarised budget for the project (to be filled in directly online)
- Application Form Part B contains the technical description of the project (template to be downloaded from the Portal Submission System, completed, assembled and re-uploaded)
- mandatory annexes and supporting documents (templates to be downloaded from the Portal Submission System, completed, assembled and reuploaded):
  - detailed budget table/calculator: not applicable
  - CVs (short outlines) of core project team
  - Activity reports of last year: not applicable
  - list of previous projects (key projects relating to the subject of the call in the last 3 years) (template available in Part B)

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

Your application must be **readable**, **accessible and printable** (please check carefully the layout of the documents uploaded).

Proposals are limited to maximum **40 pages** (Part B). Evaluators will not consider any additional pages.

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

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

# 6. Eligibility

#### Eligible participants (eligible countries)

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

- be legal entities (public or private bodies)
- be established in one of the eligible countries, i.e.:
  - EU Member States (including overseas countries and territories (OCTs))
  - non-EU countries:
    - listed EEA countries and countries associated to the ESF+ (<u>list of participating countries</u>)
- be non-governmental, non-profit-making, and independent of industry, commercial and business or other conflicting interests;
- have statutory aims falling under the objectives and scope of the priorities of this call for proposals;
- have national member organisations in at least fourteen (14) Member States of the European Union;
- have members that are mainly non-profit organisations;
- be mandated by their members, through a Management Board or other administrative forum, to represent these members at the EU level and to be responsible for the activities of the network.;
- be organisations that have first been awarded a framework partnership (see call ESF-2025-OG-NETW-NGO-FPA).

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

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

Specific cases and definitions

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

International organisations — International organisations are NOT eligible.

Entities without legal personality — Entities which do not have legal personality under their national law may exceptionally participate, provided that their representatives have the capacity to undertake legal obligations on their behalf, and offer guarantees for the protection of the EU financial interests equivalent to that offered by legal persons<sup>7</sup>.

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

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See Article 200(2)(c) EU Financial Regulation 2024/2509.

Associations and interest groupings — Entities composed of members may participate as 'sole beneficiaries' or 'beneficiaries without legal personality'<sup>8</sup>. Please note that if the action is implemented by the members, they should also participate (either as beneficiaries or as affiliated entities, otherwise their costs will NOT be eligible).

Social partner organisations — These include notably the European social partner organisations that are consulted in accordance with Article 154 TFEU (for the list, see <u>List of consulted organisations</u>) as well as other European-level social partner organisations that are not included in this list, but who are for example involved in the preparation and launch of European social dialogue at sector level. Social partner organisations without legal personality are eligible provided that the conditions for entities without legal personality (see above) are met.

Countries currently negotiating association agreements — Beneficiaries from countries with ongoing negotiations for participation in the programme (see list of participating countries above) may participate in the call and can sign grants if the negotiations are concluded before grant signature and if the association covers the call (i.e. is retroactive and covers both the part of the programme and the year when the call was launched).

EU restrictive measures — Special rules apply for entities subject to <u>EU restrictive</u> <u>measures</u> under Article 29 of the Treaty on the European Union (TEU) and Article 215 of the Treaty on the Functioning of the EU (TFEU)<sup>9</sup>. Such entities are not eligible to participate in any capacity, including as beneficiaries, affiliated entities, associated partners, subcontractors or recipients of financial support to third parties (if any).

EU conditionality measures — Special rules apply for entities subject to measures adopted on the basis of EU Regulation 2020/2092<sup>10</sup>. Such entities are not eligible to participate in any funded role (beneficiaries, affiliated entities, subcontractors, recipients of financial support to third parties, etc). Currently such measures are in place for Hungarian public interest trusts established under the Hungarian Act IX of 2021 or any entity they maintain (see Council Implementing Decision (EU) 2022/2506, as of 16 December 2022).

For more information, see <u>Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment.</u>

## Consortium composition

Only applications by single applicants are allowed.

#### Eligible activities

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

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

Projects must comply with EU policy interests and priorities (such as environment, social, security, industrial and trade policy, etc). Projects must also respect EU values and European Commission policy regarding reputational matters (e.g. activities involving capacity building, policy support, awareness raising, communication, dissemination, etc).

For the definitions, see Articles 190(2) and 200(2)(c) EU Financial Regulation 2024/2509.

Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the <u>EU Sanctions Map</u>.

Regulation (EU, Euratom) 2020/2092 of the European Parliament and of the Council of 16 December 2020 on a general regime of conditionality for the protection of the Union budget (OJ L 325, 20.12.2022, p. 94).

Financial support to third parties is not allowed.

Projects should be consistent with the action plan submitted for the framework partnership. Only applications that have first been awarded a framework partnership will be considered eligible.

#### Geographic location (target countries)

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

#### **Duration**

The duration of the work programme to be covered by the 2022 operating grant should coincide with the budgetary (financial) year of the applicant (12 months).

#### Project budget

The annual budgets of operating grants are expected to range indicatively between EUR 100.000 and EUR 1.250.000 per work programme.

The value of the annual grant should be in line with the FPA's multi-annual budget estimate. The grant awarded may be lower than the amount requested.

# 7. Financial and operational capacity and exclusion

#### Financial capacity

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

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

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

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

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

If we consider that one or more participants' financial capacity is not satisfactory, we may require:

- further information
- an enhanced financial responsibility regime, i.e. joint and several responsibility for all beneficiaries or joint and several liability of affiliated entities (see below, section 10)
- prefinancing paid in instalments
- (one or more) prefinancing guarantees (see below, section 10)

or

- propose no prefinancing
- request that the participants are replaced or, if needed, reject the entire proposal.

For more information, see <u>Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment</u>.

## Operational capacity

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

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

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

- general profiles (qualifications and experiences) of the staff responsible for managing and implementing the project (CVs of the proposed the persons who will perform the main tasks, notably project manager and key personnel)
- list of previous projects (key projects relating to the subject of the call in the last 3 years) (template available in Part B)

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

## **Exclusion**

Applicants which are subject to an **EU exclusion decision** or in one of the following **exclusion situations** that bar them from receiving EU funding can NOT participate <sup>11</sup>:

- bankruptcy, winding up, affairs administered by the courts, arrangement with creditors, suspended business activities or other similar procedures (including procedures for persons with unlimited liability for the applicant's debts)
- in breach of social security or tax obligations (including if done by persons with unlimited liability for the applicant's debts)
- guilty of grave professional misconduct<sup>12</sup> (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- committed fraud, corruption, links to a criminal organisation, money laundering, terrorism-related crimes (including terrorism financing), child labour or human trafficking (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)

See Articles 138 and 143 of EU Financial Regulation <u>2024/2509</u>.

<sup>&#</sup>x27;Professional misconduct' includes, in particular, the following: violation of ethical standards of the profession; wrongful conduct with impact on professional credibility; breach of generally accepted professional ethical standards; false declarations/misrepresentation of information; participation in a cartel or other agreement distorting competition; violation of IPR; attempting to influence decision-making processes by taking advantage, through misrepresentation, of a conflict of interests, or to obtain confidential information from public authorities to gain an advantage; incitement to discrimination, hatred or violence or similar activities contrary to the EU values where negatively affecting or risking to affect the performance of a legal commitment.

- shown significant deficiencies in complying with main obligations under an EU procurement contract, grant agreement, prize, expert contract, or similar (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- guilty of irregularities within the meaning of Article 1(2) of EU Regulation 2988/95 (including if done by persons having powers of representation, decision-making or control, beneficial owners or persons who are essential for the award/implementation of the grant)
- created under a different jurisdiction with the intent to circumvent fiscal, social
  or other legal obligations in the country of origin or created another entity with
  this purpose (including if done by persons having powers of representation,
  decision-making or control, beneficial owners or persons who are essential for
  the award/implementation of the grant)
- intentionally and without proper justification resisted<sup>13</sup> an investigation, check or audit carried out by an EU authorising officer (or their representative or auditor), OLAF, the EPPO, or the European Court of Auditors.

Applicants will also be rejected if it turns out that 14:

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

# 8. Evaluation and award procedure

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

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

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

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

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

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<sup>&#</sup>x27;Resisting an investigation, check or audit' means carrying out actions with the goal or effect of preventing, hindering or delaying the conduct of any of the activities needed to perform the investigation, check or audit, such as refusing to grant the necessary access to its premises or any other areas used for business purposes, concealing or refusing to disclose information or providing false information.

See Article 143 EU Financial Regulation 2024/2509.

If you believe that the evaluation procedure was flawed, you can submit a **complaint** (following the deadlines and procedures set out in the evaluation result letter). Please note that notifications which have not been opened within 10 days after sending will be considered to have been accessed and that deadlines will be counted from opening/access (see also <u>Funding & Tenders Portal Terms and Conditions</u>). Please also be aware that for complaints submitted electronically, there may be character limitations.

#### 9. Award criteria

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

Relevance: Relevance to the themes, priorities and objectives of the call, of the
organisation's mission statement, the specific objectives defined for the period
covered by the framework partnership, the activities and multi-annual action
plan; contribution and added-value of the programme to the EU policy. (Max.
40 points)

#### - Quality:

- Project design and implementation: Overall technical quality and clarity of multi-annual plan; internal communication and management procedures, risk management, monitoring and evaluation, feasibility of the programme (methodology and timeframe); cost-effectiveness (sufficient /appropriate budget for proper implementation; best value for money). (Max. 30 points)
- Project team and cooperation arrangements: How cooperation arrangements among team and network members will ensure effective delivery of the work programme; well-justified recourse to subcontracting. (Max. 10 points)
- Impact: European/transnational impact of the network, activities and outputs; extent to which the programme and activities focus on local outreach and implementation; ambition and relevance of expected long-term impact of results on target groups/general public; appropriate dissemination strategy to ensure sustainability and long-term impact on identified target groups. (Max. 20 points)

Award criteria	Minimum pass score	Maximum score
Relevance	25	40
Quality — Project design and implementation	15	30
Quality — Project team and cooperation arrangements	5	10
Impact	10	20
Overall (pass) scores	70	100

Maximum points: 100 points.

Individual thresholds per criterion: 25/40, 15/30, 5/10 and 10/20 points.

Overall threshold: 70 points.

Proposals that pass the individual thresholds AND the overall threshold will be considered for funding — within the limits of the available budget (i.e. up to the budget ceiling). Other proposals will be rejected.

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

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

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

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

#### Milestones and deliverables

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

Beneficaries in ESF+ EaSI projects will have to ask attendees in activities/events to participate in an EU survey to provide policy feedback. This survey allows the granting authority to closely monitor training, mutual learning and awareness-raising events. The beneficiaries will receive a weblink to the survey, to be forwarded to the attendees.

It is mandatory to provide a list of at least 4 milestones per project. At least 30% of the milestones must be linked to activities addressing at least one of the principles of the EPSR.

It is mandatory to include in the proposal a public deliverable containing the annual report of the organisation, including a clear and specific indication of the implemented activities covered by EU funding.

# Starting date and project duration

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

Project duration: see section 6 above.

#### Form of grant, funding rate and maximum grant amount

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

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

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

The costs will be reimbursed at the funding rate fixed in the Grant Agreement (85%).

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

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

#### Budget categories and cost eligibility rules

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

Budget categories for this call:

- A. Personnel costs
  - A.1 Employees,
  - A.2 Natural persons under direct contract,
  - A.3 Seconded persons
  - A.5 Volunteers
- B. Subcontracting costs
- C. Purchase costs
  - C.1 Travel and subsistence
  - C.2 Equipment
  - C.3 Other goods, works and services

Specific cost eligibility conditions for this call:

- personnel costs:
  - volunteers unit cost<sup>15</sup>: Yes (without indirect costs)
- travel and subsistence unit cost<sup>16</sup>: Yes<sup>17</sup>
- equipment costs: depreciation
- other cost categories:
  - costs for financial support to third parties: not allowed
- VAT: non-deductible/non-refundable VAT is eligible (but please note that since 2013 VAT paid by beneficiaries that are public bodies acting as public authority is NOT eligible)
- other:
  - in-kind contributions for free are allowed, but cost-neutral, i.e. they cannot be declared as cost
  - project websites: communication costs for presenting the project on the participants' websites or social media accounts are eligible; costs for separate project websites are not eligible

<sup>15</sup> Commission <u>Decision</u> of 10 April 2019 authorising the use of unit costs for declaring personnel costs for the work carried out by volunteers under an action or a work programme (C(2019)2646).

Commission <u>Decision</u> of 31 July 2024 authorising the use of unit costs for travel, accommodation and subsistence costs under an action or work programme under the 2021-2027 multi-annual financial framework (C(2024)5405).

See <u>EU Grants AGA</u> — <u>Annotated Grant Agreement</u>, art 6 on eligible costs: travel and subsistence costs must be declared using the unit cost according to Annex 2a of the grant agreement. If a particular instance of travel, accommodation or subsistence in the action is not covered by one of the unit costs mentioned in Decision C(2021)35 the actual costs may be used.

other ineligible costs: No

Volunteers costs — Volunteers costs are not a classic cost category. There are no costs because volunteers work for free, but they may nontheless be added to the budget in the form of a pre-fixed unit cost (per volunteer) and thus allow you to benefit from the volunteers' work for the grant (by increasing the amount of reimbursement up to 100% of the normal costs, i.e. cost categories other than volunteers). More information is available in the AGA — Annotated Grant Agreement, art 6.2.A.5.

Indirect costs — For operating grants, there is no differentiation between direct and indirect cost (because the grant aims to a large extent the financing of costs which would normally be considered 'indirect', i.e. general management costs, general running costs, etc). Receiving an operating grant may however make you ineligible for receiving indirect costs in your EU action grants. If you intend to also apply for action grants, please make sure that you either have the accounting tools in place to combine them (or that the operating grants pays off — meaning that it covers enough of your general running costs and overheads to compensate the loss of the indirect costs in the action grants).

#### Reporting and payment arrangements

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

Payment of the grant is generally made in **prefinancing** instalments and a **final payment** (the balance).

The aim of the prefinancing is to provide the beneficiaries with a float. The prefinancing remains the property of the EU until the payment of the balance. The frequency and size of prefinancing will depend on the project duration, but may be adjusted in case of risk.

The payment schedule is normally as follows:

- actions of 12 months: one prefinancing payment of 70% paid within 30 days from the entry into force of the grant agreement or after receiving the financial guarantee (if required), whichever is the latest
- actions between 12 and 24 months: prefinancing payments linked to annual reporting periods will be made as follows:
  - an initial prefinancing payment of 40% paid within 30 days from the entry into force of the grant agreement or after receiving the financial guarantee (if required), whichever is the latest
  - a second prefinancing of 40% after receiving an additional prefinancing report. Where the consumption of the previous prefinancing is less than 70%, the amount of the new prefinancing payment will be reduced by the difference between the 70% ceiling and the amount used
- actions between 24 and 36 months: prefinancing payments linked to annual reporting periods will be made as follows:
  - an initial prefinancing payment of 30% paid within 30 days from the entry into force of the grant agreement or after receiving the financial guarantee (if required), whichever is the latest
  - a second and third prefinancing of 40% and 20% after receiving additional prefinancing reports. Where the consumption of the previous prefinancing

is less than 70%, the amount of the new prefinancing payment will be reduced by the difference between the 70% ceiling and the amount used.

There will be no interim payments.

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

All payments will be made to the coordinator.

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

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

#### Prefinancing quarantees

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

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

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

Prefinancing guarantees are normally requested from the coordinator, for the consortium. They must be provided during grant preparation, in time to make the prefinancing (scanned copy via Portal AND original by post).

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

The guarantee will be released at the end of the grant, in accordance with the conditions laid down in the Grant Agreement (art 23).

#### Certificates

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

#### Liability regime for recoveries

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

For beneficiaries, it is limited joint and several liability with individual ceilings — *each* beneficiary up to their maximum grant amount.

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

#### Provisions concerning the project implementation

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

rights of use on results: Yes

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

additional communication and dissemination activities: Yes

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

- specific rules for ESF+ actions: Yes
- specific rules for financial support to third parties: No

#### Non-compliance and breach of contract

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

For more information, see <u>AGA — Annotated Grant Agreement</u>.

# 11. How to submit an application

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

Submission is a 2-step process:

# a) create a user account and register your organisation

To use the Submission System (the only way to apply), all participants need to <u>create</u> an EU Login user account.

Once you have an EULogin account, you can <u>register your organisation</u> in the Participant Register. When your registration is finalised, you will receive a 9-digit participant identification code (PIC).

## b) submit the proposal

Access the Electronic Submission System via the Topic page in the <u>Calls for proposals</u> section (or, for calls sent by invitation to submit a proposal, through the link provided in the invitation letter).

Submit your proposal in 3 parts, as follows:

- Part A includes administrative information about the applicant organisations (future coordinator, beneficiaries, affiliated entities and associated partners) and the summarised budget for the proposal. Fill it in directly online.
- Part B (description of the action) covers the technical content of the proposal.
   Download the mandatory word template from the Submission System, fill it in and upload it as a PDF file.

 Annexes (see section 5). Upload them as PDF file (single or multiple depending on the slots). Excel upload is sometimes possible, depending on the file type.

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

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

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

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

Details on processes and procedures are described in the <u>Online Manual</u>. The Online Manual also contains the links to FAQs and detailed instructions regarding the Portal Electronic Exchange System.

#### 12. Help

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

- Online Manual
- Topic Q&A on the Topic page (for call-specific questions in open calls; not applicable for actions by invitation)
- Portal FAQ (for general questions).

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

#### Contact

For individual questions on the Portal Submission System, please contact the <a href="https://example.com/linearing/linearing/">IT</a> Helpdesk.

Non-IT related questions should be sent to the following email address:

general questions on ESF+: <u>EMPL-EaSI@ec.europa.eu</u>
 call-specific questions: <u>EMPL-CALL-EASI-SOCIAL-INCLUSION@ec.europa.eu</u>.

# APlease:

- send your questions at the latest 7 days before the submission deadline (see section 4)
- indicate clearly the reference of the call and topic to which your question relates (see cover page).

# 13. Important



# IMPORTANT

- Don't wait until the end Complete your application sufficiently in advance of the deadline to avoid any last minute technical problems. Problems due to last minute submissions (e.g. congestion, etc) will be entirely at your risk. Call deadlines can NOT be extended.
- Consult the Portal Topic page regularly. We will use it to publish updates and additional information on the call (call and topic updates).
- Funding & Tenders Portal Electronic Exchange System By submitting the application, all participants accept to use the electronic exchange system in accordance with the Portal Terms & Conditions.
- Registration Before submitting the application, all beneficiaries, affiliated entities and associated partners must be registered in the Participant Register. The participant identification code (PIC) (one per participant) is mandatory for the Application Form.
- Coordinator not applicable
- Affiliated entities not applicable
- Associated partners not applicable
- **Consortium agreement** —not applicable.
- Balanced project budget— Grant applications must ensure a balanced project budget and sufficient other resources to implement the project successfully (e.g. own contributions, income generated by the action, financial contributions from third parties, etc). You may be requested to lower your estimated costs, if they are ineligible (including excessive).
- Completed/ongoing projects Proposals for projects that have already been completed will be rejected; proposals for projects that have already started will be assessed on a case-by-case basis (in this case, no costs can be reimbursed for activities that took place before the project starting date/proposal submission).
- No-profit rule Grants may NOT give a profit (i.e. surplus of revenues + EU grant over costs). This will be checked by us at the end of the project.
- No cumulation of funding/no double funding It is strictly prohibited to cumulate funding from the EU budget (except under 'EU Synergies actions'). Outside such Synergies actions, any given action may receive only ONE grant from the EU budget and cost items may under NO circumstances be declared under two EU grants; projects must be designed as different actions, clearly delineated and separated for each grant (without overlaps).
- Multiple proposals not applicable.
- Resubmission Proposals may be changed and re-submitted until the deadline for submission.
- **Rejection** By submitting the application, all applicants accept the call conditions set out in this Call document (and the documents it refers to). Proposals that do not comply with all the call conditions will be rejected. This applies also to applicants: all applicants need to fulfil the criteria; if any of them doesn't, they must be replaced or the entire proposal will be rejected.

- Cancellation There may be circumstances which may require the cancellation of the call. In this case, you will be informed via a call or topic update. Please note that cancellations are without entitlement to compensation.
- Language You can submit your proposal in any official EU language (project abstract/summary should, however, always be in English). For reasons of efficiency, we strongly advise you to use English for the entire application. If you need the call documentation in another official EU language, please submit a request within 10 days after call publication (for the contact information, see section 12).
- **Transparency** In accordance with Article 38 of the <u>EU Financial Regulation</u>, information about EU grants awarded is published each year on the Europa website.

#### This includes:

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

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

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