

How to apply for EU Funding: call for tenders/call for proposals

Wifi: Husa seminar / Password: president10

Charlotte Roffiaen & Christophe Duflos
Brussels, 26 and 27 November 2014

Agenda (1)

A four-step approach :

- Identification of calls for proposals relevant to Hotrec members
- Evaluation of a call for proposal step-by-step
- Development of a Project Proposal step-by-step
- Practical exercise based on team work and case studies

Agenda (2)

- Wednesday 26th November (a.m.)
 - Who's who?
 - Commission's Presentation of the Guide on EU Funding for the Tourism Sector
 - Coffee break
 - What can your organisation realistically expect from EU funding?
 - Lunch

Who's who?



- Charlotte Roffiaen
 - French living in Rome (IT) since 2001
 - Co-founder of EU4U Expert network in 2011
 - 13 years of experience in the development and management of European projects as:
 - Evaluator of project proposals for the Commission since 2009.
 - Independent consultant since 2008.
 - Director of a European network of non-profit organisations between 2001 and 2008.

Who's who?



- Christophe Duflos
 - French national; set up his EU consultancy company in 2000; co-founder of EU4U Expert network in 2011
 - 15 years of experience in the development, management and evaluation of European projects:
 - Editorial Coordinator of the Eurobarometer national reports
 - Evaluator of project proposals for the Commission
 - Participation in the Management and Quality Management of several Erasmus+ European projects

Who's who?

- Participants (30 s. each maximum)
 - Name
 - Country
 - Organisation
 - Experience in EU project development (Y/N)
 - Expectations concerning this training (1 sentence)

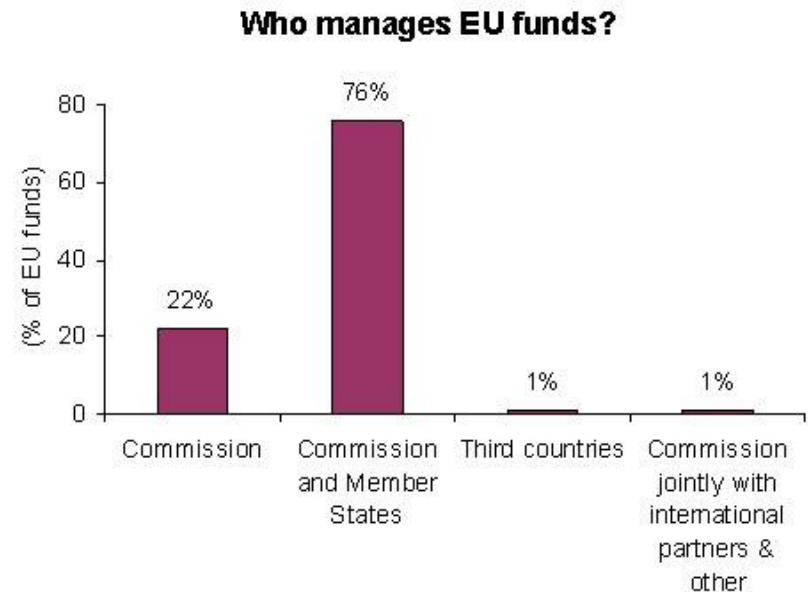
A. Introduction

Vocabulary and basic concepts

- Do you know the difference between:
 - Call for proposals (CP) / Call for tender?
 - European Structural and Investment Funds / Centrally managed EU funds?

Who manages the EU money?

- Ultimate responsibility for implementing the budget lies with the European Commission.
- But in practice, some **76% of the budget is spent under 'shared management'**, i.e. EU Member States distribute the funds.



Who manages the EU money?

- European Structural and Investment Funds
 - They are managed by **national or regional Managing Authorities**, based on Partnership Agreements and Operational Programmes negotiated with the European Commission (Shared Management)
 - The Managing Authorities (Ministries, regions, etc.) publish calls for proposals that reflect their national / regional priorities
 - The amounts of EU funding vary according to the country & region
 - The first calls will probably be published at the beginning of 2015 (most Operational Programmes not approved yet)
 - These calls for proposals often do not require international partnerships, whereas this is the rule for other calls for proposals.

Who manages the EU money?

- European Structural and Investment Funds
 - Cohesion policy funds: are designed to help member states and regions reach the Europe 2020 goals of smart, sustainable and inclusive growth and aim to reduce regional disparities in terms of income, wealth and opportunities.
 - European Regional Development Fund ([ERDF](#))
 - European Social Fund ([ESF](#))
 - Cohesion Fund ([CF](#))
 - Other funds:
 - European Agricultural Fund for Rural Development ([EAFRD](#))
 - European Maritime & Fisheries Fund ([EMFF](#))

Who manages the EU money?

- EU funds managed by the Commission:
 - Directly: the Commission's DGs are in charge of publishing the calls, selecting the projects, awarding the grants, etc.
 - Indirectly: the executive tasks (selecting projects, awarding grants, transferring money, etc.) are delegated either to:
 - European agencies (e.g.: The Executive Agency for Small and Medium-sized Enterprises ([EASME](#)))
 - National Agencies (e.g.: National Agencies implementing [Erasmus +](#))
- These [funding programmes](#) correspond to the different policies of the European Commission, that they contribute to implement through the publication of calls for proposals and calls for tenders

Who manages the EU money?

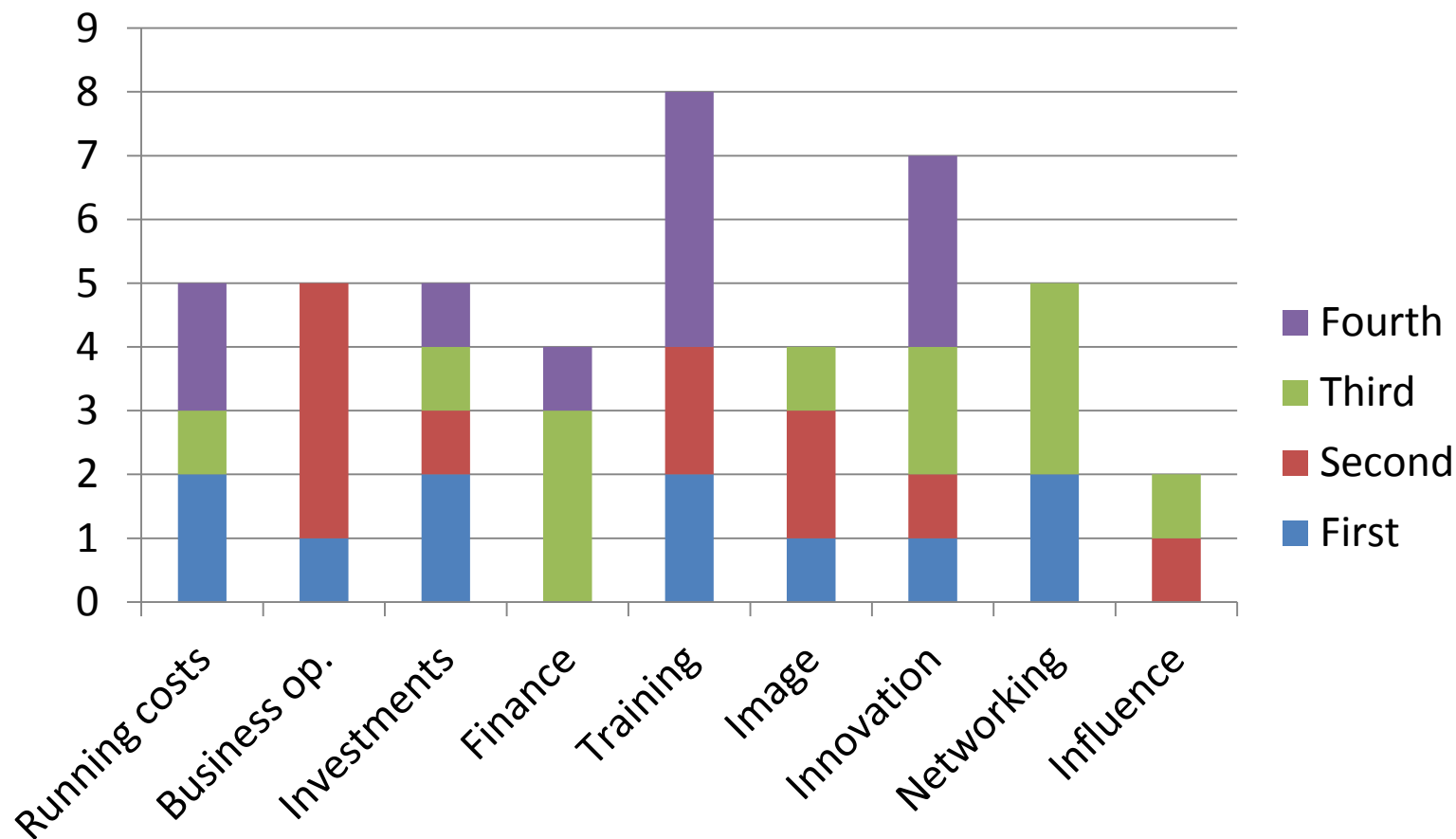


The screenshot shows a web browser window with the URL ec.europa.eu/budget/mff/programmes/index_en.cfm. The page displays a list of EU funds and programs, each with a green 'ADOPTED' label. The sidebar on the right features a book cover titled 'MFF 2014-2020 and EU budget 2014'.

Fund/Program	Status
Asylum, Migration and Integration Fund	ADOPTED
Civil Protection Mechanism	ADOPTED
Cohesion fund	ADOPTED
Common Agricultural Policy (pillar I)	ADOPTED
Common Foreign and Security Policy	ADOPTED
Connecting Europe Facility	ADOPTED
Consumer Programme	ADOPTED
Copernicus	ADOPTED
Competitiveness of Enterprises and SMEs (COSME)	ADOPTED
Customs, Taxation and Fight against Fraud	ADOPTED
Creative Europe	ADOPTED
Development Cooperation Instrument	ADOPTED
Employment and Social innovation Programme	ADOPTED
EU Aid Volunteers	ADOPTED
EU Civil Protection and European Emergency Response Coordination Centre	ADOPTED
European Instrument for Democracy and Human Rights	ADOPTED
European Maritime Affairs and Fisheries	ADOPTED
Erasmus+	ADOPTED
European neighbourhood Instrument	ADOPTED
Europe for Citizens	ADOPTED

MFF 2014-2020 and EU budget 2014

Questionnaires' results: ranking of your expectations



EU funding: what can your organisation realistically expect? (1)



- **Innovation (business ideas, processes, tools, etc.)**
 - Transversal key objective of all EU funding programmes
 - It is specifically targeted by Horizon 2020, the EU Framework Programme for Research and Innovation
 - A number of [subject areas](#) and related calls for proposals could be of interest for the hospitality sector
 - Example 1: [Energy efficiency](#) calls for proposals aimed at funding research and demonstration activities aimed at decreasing the primary energy consumption of buildings, industry, SMEs, etc.
 - Example 2: The [SME Instrument](#), which helps high-potential SMEs to develop very innovative ideas for products, services or processes

EU funding: what can your organisation realistically expect? (2)

Horizon 2020 Programme

Find your area

- ▶ Agriculture & Forestry
- ▶ Aquatic Resources
- ▶ Bio-based Industries
- ▶ Biotechnology
- ▶ Energy
- ▶ Environment & Climate Action
- ▶ Food & Healthy Diet
- ▶ Funding Researchers
- ▶ Health
- ▶ ICT Research & Innovation
- ▶ Innovation
- ▶ International Cooperation
- ▶ Key Enabling Technologies
- ▶ Partnerships with Industry and Member States
- ▶ Raw Materials
- ▶ Research Infrastructures
- ▶ Security
- ▶ SMEs
- ▶ Social Sciences & Humanities
- ▶ Society
- ▶ Space

Search

#H2020

NCP Horizon 2020 @NCPHorizon2020
#h2020 Call Results: 45 successful projects in #EnergyEfficiency, 15 Call topics for €76.5m ow.ly/DXxIR via @H2020EE @EU_H2020
18m

H2020 SME Instrument @H2020SME
Hľadáme odborníkov, ktorí poskytnú obchodné koučovanie pre príjemcov #H2020 #SMEinstrument goo.gl/LWsVIF @EEN_EU
26m

chimica.unito @dipchim
Quando è possibile presentare le proposte per partecipare allo #SMEinstrument di #H2020? fb.me/1saAyMzkZ
32m

YOUR FEEDBACK

EU funding: what can your organisation realistically expect? (3)



- **Training opportunities**

- Erasmus + programme:
 - Especially vocational education & training.
 - Individual mobility or strategic partnerships.
- Erasmus for young entrepreneurs:
 - Exchange programme for new or aspiring entrepreneurs who learn from experienced entrepreneurs running small businesses in other Participating Countries.
 - Young entrepreneurs' expenses are partially funded by the EU (small grants).

EU funding: what can your organisation realistically expect? (4)



- **Training opportunities**
 - European Social Fund
 - May be used for training workers of companies coping with restructuring or a lack of qualified workers, or for training people in difficulty to get better skills and jobs (ex. p. 17 of the EU funding Guide for tourism sector).
 - All projects have to be co-financed, with a maximum EU contribution of 50% to 85% of the total project costs depending on the [relative wealth of the region](#)
 - The level of funding varies widely (from a few tens of thousands of euros to several millions), depending of the project and the region.

EU funding: what can your organisation realistically expect? (5)

Guide on EU Funding for Tourism.pdf - Adobe Reader
File Modifica Vista Finestra ?

Source: Uroš Škerl Kramberger on 19/09/2013 <http://www.dnevnik.si/>

Stimulating rural tourism by cooking with local products

The ESF supported the "Cooking with local produce" training programme organised in the Vercors district (France) by AFRAT, the association for training rural people in tourism activities (EUR 52.000, 50% co-financing). The training drew on the practices and history of the countryside. It combined theory and practice, introducing students to local producers and arranging work experience (hostels, country restaurants, rural hotel businesses, gîtes and tourist activity centres). All participants (apprentice cooks) found work at the end of the programme. Cooking with local products proved to stimulate tourism business in the area.

EU contribution: € 52.776 (2010) - Level of EU funding: 50%

Source: European Social Fund [list of projects](#)

210 x 297 mm

11:21
12/11/2014

EU funding: what can your organisation realistically expect? (6)



- **Funding of the running costs**
 - A few CPs fund the operational costs of non-profit organisations (“operating grants”)
 - Mostly NGOs or Think tanks
 - Must usually have members in a large number of EU countries
 - They must contribute to the implementation of the Commission’s policy in a certain area
 - The other CPs only fund the costs directly linked to the implementation of the project

EU funding: what can your organisation realistically expect? (7)



- **New business opportunities**

- Contracts for the provision of services to the EU Institutions (Calls for tenders)
 - Published exclusively online: [TED](#)
 - Example of [TOURISMLink](#)
 - Other potentially interesting calls: Provision of hotel and restaurant services, including in relation with the organisation of events
 - Usually rather competitive and complicated tenders but possible to be part of a consortium

EU funding: what can your organisation realistically expect? (8)

File Modifica Visualizza Cronologia Segnalibri Strumenti Aiuto

Boite de réception (10 318) ... Google Calendar Mardi 11 novembre 2014 - ... Search result - TED Tender... Licitatie deschisa pentru "S... invitation_to_tender_po-20... TourismLink NCI luxembourg - Recher...

ted.europa.eu/TED/search/searchResult.do?page=1

Refine Search Print search Save search Help

Place of delivery (NUTS) Heading

My TED

Charlotte ROFFIAEN

User profile

Update ECAS information

Preferences

Clipping list

Recently viewed documents

Saved search profile

Customized RSS feeds

Personal address book

Bulk Download

Log out

News

Site news

Public Procurement News

RSS feeds

What is RSS?

e-Certis

Information on certificates required in public procurement in the EU

EUR-Lex

The Official Journal of the European Union online

EU Bookshop

All EU publications you are looking for

Search scope: Archives

Your selection:

Type of authority: ☒ European institution/Agency or International Organisation

Full text: ☒ Hotel ☒ restaurant ☒ services

from: ☒ Jan 1, 2014 to: ☒ Nov 11, 2014

66 elements found, displaying 1 to 25. [First/Prev] 1, 2, 3 [Next/Last]

Document number	Description	Country	Publication date	Deadline
<input type="checkbox"/> 381650-2014	Belgium-Brussels: Provision of hotel, restaurant and local transport services bookings for groups visiting the European Commission's Visitors' Centre in Brussels, PO/2014-20/C4 Type of authority: European institution/Agency or International Organisation Document type: Contract notice	BE	08-11-2014	09-01-2015
<input type="checkbox"/> 374550-2014	Belgium-Brussels: Provision of training rooms and related services in Luxembourg Type of authority: European institution/Agency or International Organisation Document type: Contract award	BE	04-11-2014	
<input type="checkbox"/> 371091-2014	Poland-Warsaw: Conference and event organisation services for Frontex Type of authority: European institution/Agency or International Organisation Document type: Contract notice	PL	31-10-2014	08-12-2014
<input type="checkbox"/> 358288-2014	Poland-Warsaw: Organisation of the European day for border guards event Type of authority: European institution/Agency or International Organisation Document type: Contract notice	PL	22-10-2014	27-11-2014
<input type="checkbox"/> 356133-2014	Belgium-Brussels: Request for establishments offering accommodation to make their rooms available for officials and other staff of the European Commission/EU agencies at prices which do not exceed the statutory limit Type of authority: European institution/Agency or International Organisation Document type: Call for expressions of interest	BE	21-10-2014	07-10-2018
<input type="checkbox"/> 350867-2014	Spain-Alicante: Management and operation of catering infrastructure and collective services at the Office for Harmonization in the Internal Market Type of authority: European institution/Agency or International Organisation Document type: Contract award	ES	16-10-2014	
<input type="checkbox"/> 343676-2014	Netherlands-The Hague: Hotel rooms in The Hague Type of authority: European institution/Agency or International Organisation Document type: Contract notice	NL	10-10-2014	16-11-2014
<input type="checkbox"/> 341752-2014	Turkey-Ankara: EEAS-263-DELTURA-SER-FWC — Cleaning and beverage-serving services Type of authority: European institution/Agency or International Organisation Document type: Contract notice	TR	09-10-2014	10-11-2014
<input type="checkbox"/> 327026-2014	Belgium-Brussels: UCA-PRQ-14/079 — Collective and formal catering services in buildings occupied by the European Council and the Council of the European Union in Brussels Type of authority: European institution/Agency or International Organisation Document type: Additional information	BE	27-09-2014	27-10-2014
<input type="checkbox"/> 324063-2014	Luxembourg-Luxembourg: Call for tenders No EAHC/2013/Health/14 concerning the conclusion of framework contracts in cascade on external assistance for external communication activities in the field of public health, consumers and food safety Type of authority: European institution/Agency or International Organisation Document type: Contract award	LU	25-09-2014	
<input type="checkbox"/> 322138-2014	Belgium-Brussels: UCA-PRQ-14/079 — Collective and formal catering services in buildings occupied by the European Council and the Council of the European Union in Brussels Type of authority: European institution/Agency or International Organisation Document type: Contract notice	BE	24-09-2014	27-10-2014
<input type="checkbox"/> 315527-2014	Hungary-Budapest: Call for tenders 01/2014/NP/ETPROC for the provision of catering services for the European Institute of Innovation and Technology Type of authority: European institution/Agency or International Organisation Document type: Contract award	HU	18-09-2014	
<input type="checkbox"/> 309706-2014	Poland-Warsaw: NPP — Canteen in the Frontex new premises	PL	13-09-2014	

IT 17:49 11/11/2014

EU funding: what can your organisation realistically expect? (9)

The screenshot displays the TOURISMlink website, which aims to "Linking tourism professionals with the digital market". The site features three main pillars: "TOURISM today", "TOURISM link", and "TOURISM tomorrow".

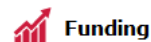
- TOURISM today:** Small European tourism enterprises have not yet taken full advantage of opportunities to grow their businesses in the digital market. Find out more.
- TOURISM link:** TOURISMlink is enhancing the digital connection between SMEs in source and destination markets, facilitating commercial transactions. Find out more.
- TOURISM tomorrow:** With TOURISMlink, no travel business will be left out of the digital value chain. Connections will be strengthened across Europe. Find out more.

The website also includes a navigation bar with links to HOME, TOURISMtoday, TOURISMlink, TOURISMtomorrow, and TOURISMlink PLATFORM. A video player shows "TOURISMlink explained: an animated video" with a thumbs-up icon. A news section highlights two articles: "How can TOURISMlink be successful in the future?" and "TOURISMlink meets Travel Technology Companies and Technology providers at ETOA's digital Showcase". A large purple box states "70% of the hotels have systems supporting online reservations". Another box shows a map with the text "TOURISMlink on the map" and a "Visit Map Now" button. The Windows taskbar at the bottom shows the date as 11/11/2014 and the time as 17:55.

EU funding: what can your organisation realistically expect? (10)

- **Access to finance**
 - The COSME programme funds guarantees for financial intermediaries to help them provide more loans and lease finance to SMEs
 - The COSME budget will also be invested in funds that provide venture capital to SMEs with good growth potential.

EU funding: what can your organisation realistically expect? (11)



EU funding
programmes

Access to finance

Exchanges for
young
entrepreneurs

Updated 11/2014

Access to finance

Share on [f](#) [t](#) [g+](#) [in](#) [✉](#)

Access to EU finance

This site will help you to apply for finance supported by the European Union. To access EU finance, click on your country to locate banks or venture capital funds that provide finance supported by the EU:

Select a country



How it works



More information



EU grants, funds and programmes (calls for proposals)



EU funding: what can your organisation realistically expect? (12)

- **The funding of investments**
 - Usually, EU programmes fund private investments only if necessary to achieve the results of a specific project.
 - However, structural funds will finance first investments in the context of business start-up aid (e.g. Development of rural accommodation funded by the European Agriculture Fund for Rural Development).
 - Private investments are mainly supported through access to credit or venture capital.

EU funding: what can your organisation realistically expect? (13)

- **Improve your business reputation (examples)**
 - Environmental sustainability:
 - The LIFE programme, i.e. the EU funding instrument for the environment and climate action, can for instance fund pilot, demonstration or best practice projects linked to sustainable tourism (example)
 - Healthy eating:
 - One of the areas of Horizon 2020 is [Food & Healthy diet](#)
 - Calls for proposals can especially fund research activities aimed at promoting consumers' sustainable eating choices
 - [We Love Eating](#) pilot project, which has [Euro-Toques International](#) among the partners.

EU funding: what can your organisation realistically expect? (14)

Sustainable cruise

According to the 2008 EU Waste Framework Directive, waste prevention should be the first priority in waste management. Given the degree of luxury afforded to their passengers, cruise ships produce a lot of waste (with less than 1% of the merchant fleet, it is estimated that they are responsible for 25% of its waste).

Led by one of the largest cruise companies (Costa Crociere), the project therefore aimed in particular to demonstrate the potential for waste prevention, recovery and recycling on a cruise ship. It has assessed the environmental impacts of three waste streams (packaging, biodegradable waste and paper) and the technical/economic viability of the large-scale waste management solutions. It has also suggested a standardised approach to waste management on-board. Last but not least, it provided guidelines for an advanced certification scheme and assessed the possibility of converting CO2 emissions reductions into tradable carbon credits.

EU contribution: € 1.314.623 (2011-2014) - Level of EU funding: 50 %

Source: [LIFE Projects database](#); [Sustainable cruise](#)

EU funding: what can your organisation realistically expect? (15)

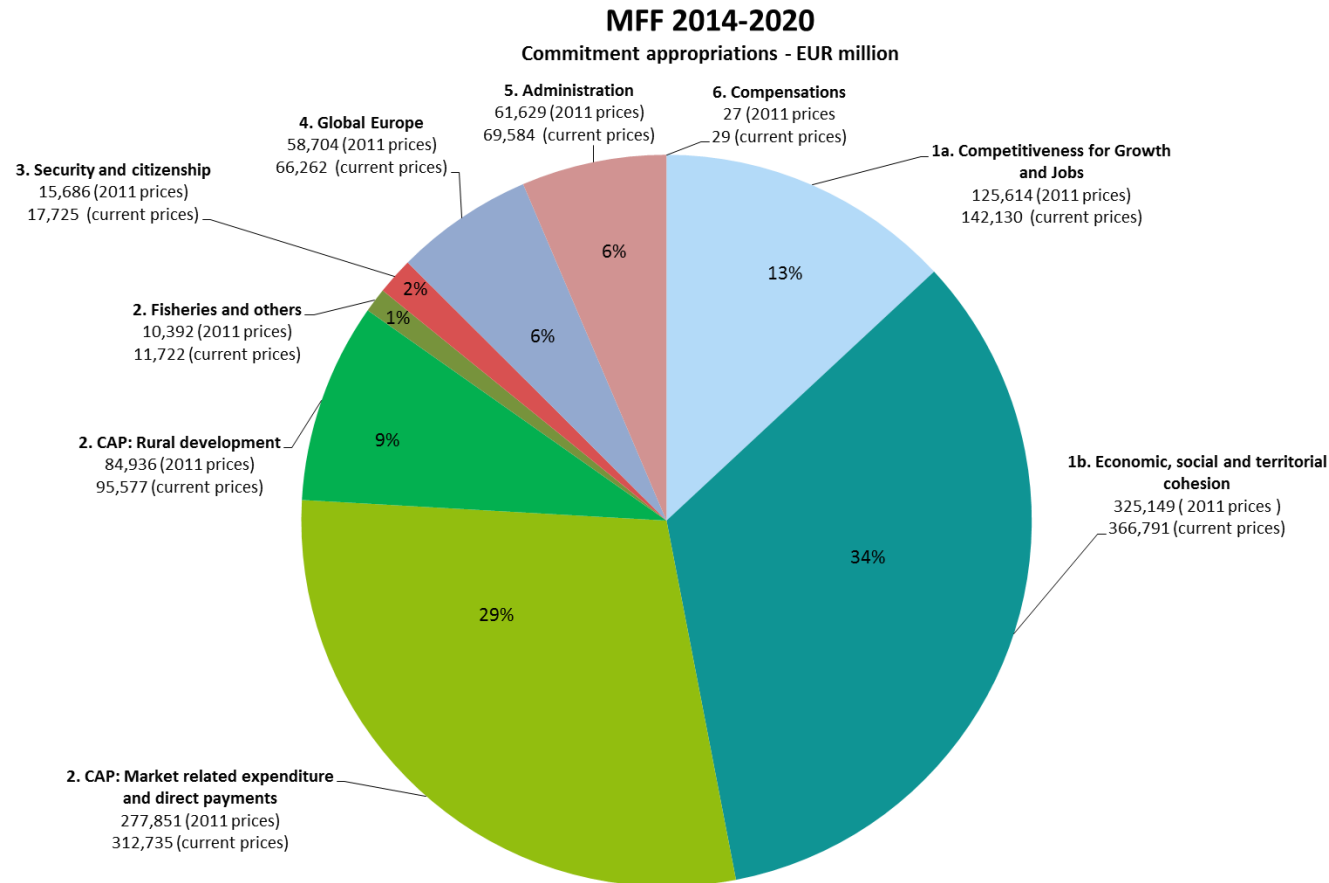
- **Others**

- Networking: One of the key added-value aspects of most EU projects, especially when based on large and diversified transnational partnerships.
- Influencing (EU) decision making:
 - EU projects are an instrument to implement the EU policies and therefore the input into these policies should appear among the activities and outcomes of many projects
 - HOTREC could also input into the decision-making process of certain annual work programmes & calls for proposals in its quality of interested party

Multiannual financial framework 2014-2020 (1)

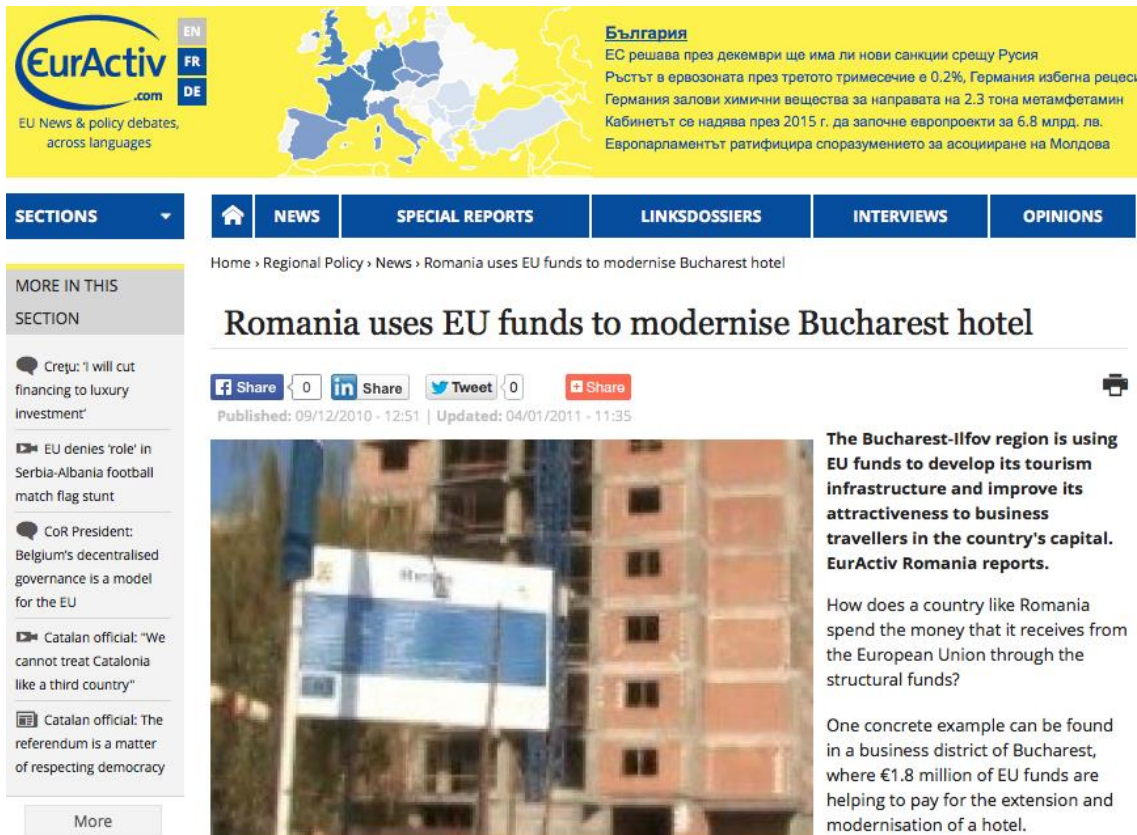
- In December 2013, the EU adopted the new multiannual financial framework for the period 2014-2020
- It determines in particular the amount of money available for each funding programme over the next 7-year period
- It was accompanied by a redefinition of the funding programmes, which includes:
 - A reduction in the number of programmes
 - A reallocation of money in favour of research, SMEs and training and education, with a strong emphasis on boosting growth and creating jobs.

Multiannual financial framework 2014-2020 (2)



Information sources (1)

1) European media shall help you better understand EU funding (general framework)



The screenshot shows the EurActiv website interface. At the top, there's a yellow banner with the EurActiv logo, language options (EN, FR, DE), a map of Europe, and a news snippet about Bulgaria. Below this is a navigation bar with sections like NEWS, SPECIAL REPORTS, LINKSDOSSIERS, INTERVIEWS, and OPINIONS. The main content area features a headline "Romania uses EU funds to modernise Bucharest hotel" with a sub-headline "The Bucharest-Ifov region is using EU funds to develop its tourism infrastructure and improve its attractiveness to business travellers in the country's capital. EurActiv Romania reports." The article text discusses how Romania spends EU funds and provides a concrete example of a hotel modernisation project in Bucharest. A sidebar on the left lists "MORE IN THIS SECTION" with various news items. Social media sharing buttons and a "More" link are also visible.

EurActiv
EU News & policy debates,
across languages

EN
FR
DE

България
ЕС решава през декември ще има ли нови санкции срещу Русия
Ръстът в ервонната през третото тримесечие е 0.2%, Германия избегна рецеси
Германия залови химични вещества за направата на 2.3 тона метамфетамин
Кабинетът се надява през 2015 г. да започне европроекти за 6.8 млрд. лв.
Европарламентът ратифицира споразумението за асоцииране на Молдова

SECTIONS
HOME NEWS SPECIAL REPORTS LINKSDOSSIERS INTERVIEWS OPINIONS

Home > Regional Policy > News > Romania uses EU funds to modernise Bucharest hotel

Romania uses EU funds to modernise Bucharest hotel

Share 0 | Share | Tweet 0 | Share

Published: 09/12/2010 - 12:51 | Updated: 04/01/2011 - 11:35

The Bucharest-Ifov region is using EU funds to develop its tourism infrastructure and improve its attractiveness to business travellers in the country's capital. EurActiv Romania reports.

How does a country like Romania spend the money that it receives from the European Union through the structural funds?

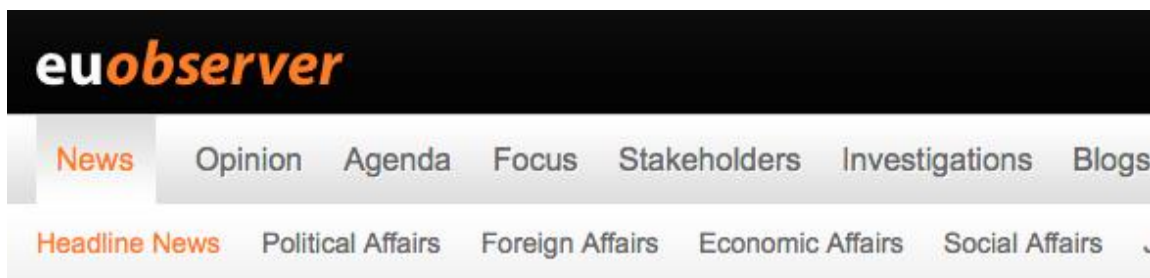
One concrete example can be found in a business district of Bucharest, where €1.8 million of EU funds are helping to pay for the extension and modernisation of a hotel.

MORE IN THIS SECTION

- Crețu: 'I will cut financing to luxury investment'
- EU denies 'role' in Serbia-Albania football match flag stunt
- CoR President: Belgium's decentralised governance is a model for the EU
- Catalan official: "We cannot treat Catalonia like a third country"
- Catalan official: The referendum is a matter of respecting democracy

More

Information sources (2)



Ministers face new battle over next year's EU budget

Information sources (3)



2) Specialized sources of information on published calls

- Websites of the Managing Authorities (examples)
 - [DG Enterprise & Industry](#)
 - Education, Audiovisual and Culture Executive Agency ([EACEA](#))
 - The section of the regions' websites dedicated to EU funding (Example of the [Ile-de-France region](#))
- Websites specifically dedicated to EU funds
 - Consulting companies (e.g. [WelcomeEurope](#))
 - Public institutions or non-profit organisations (e.g. [EuropaFacile](#))
- Infodays on funding programmes (in Brussels, at national level and/or in streaming)
 - Infoday on [Erasmus + programme](#)

Information sources (4)



3) Efficient monitoring of funding opportunities

- Journalistic technique aimed at “covering” a topic: identifying 10-15 URLs that are essential to get a comprehensive grip on your field of activity
- Getting registered to the newsletters/info bulletins/twitter accounts of the Managing Authorities and other bodies publishing information on programmes of interest for your organisations
 - e.g. [Enterprise Europe Network](#)
- Attend events where added-value information on specific EU funding programmes is proposed
- Direct contact with staff of the Managing Authorities and/or national contact points

Identification of calls that suit your fields of interest

- Practical exercise (*15 min*)
 - Identify 1 major objective of your organisation that could be supported by a EU funding scheme (e.g.: developing the language competences of waiting / reception staff of our members) (*3 min*)
 - Volunteers share their objectives
 - Participants, trainers and Commission brainstorm on possible funding hypotheses

LUNCH !

B. Evaluation of a call for proposal step-by-step

Agenda

- Wednesday 26th November (p.m.)
 - Evaluation of a call for proposals: Hands-on approach
 - Development of a project proposal step-by-step: Getting to know the basics

Evaluation of a call for proposals step-by-step

1. What should be checked first in a call for proposals ?

- Based on the notes you receive regularly from HOTREC about open calls for proposals, which information is essential to assess a call for proposals (Work in pairs - *5 min*)
- Volunteers share their answers (*5 min*)

Evaluation of a call for proposals step-by-step

- Suggestions
 - **Relevance:**
 - The call's objectives and priorities
 - **Sustainability:**
 - Application deadline & Max/min duration of the project
 - Co-funding rate and max/min EU grant
 - Minimum number of countries involved
 - Complexity of the submission form
 - **Accessibility:**
 - Eligibility (and expected promoters' profile)
 - Potential success rate (based on the overall budget / the average amount of each proposal or the expected number of funded projects, or on the success rates in the previous rounds in the case of recurrent calls for proposals)
 - Managing authority (National agency or EU agency)

Evaluation of a call for proposals step-by-step

2. Learning how to look for all the relevant information (Practical exercise)

- Read the part of the Erasmus + Programme Guide dedicated to “Strategic partnership in the field of VET” & identify the information necessary for the evaluation of the call (*work in pairs – 10 min*)
- Volunteers share their results (*10 min*)

Evaluation of a call for proposals step-by-step

3. Comparing your organisation's objectives and assets with the call's requirements (Practical exercise)

- Weighting of the 3 evaluation criteria
- How the priorities and resources of your organisations fit with the call's requirements and specifications (work in pairs – *5 min*)
- Volunteers share their evaluations (*10 min*)

Main applicant or partner?



- **Applicant**

- Organisation submitting the grant application
- Applicants may apply either
 - individually (when no partnership is requested)
 - on behalf of a consortium of organisations (the applicant is the project “Coordinator”)
- The applicant has the financial responsibility of the project (contract with the Managing Authority)

- **Partner**

- All other organisations part of the consortium responsible for implementing the project

Main applicant or partner?



- **Being the applicant:**
 - Requires a certain managerial and financial size. The managerial burden should not be underestimated!
 - Creates many legally binding obligations (both financial & administrative)
 - Increases the visibility of your organisation
 - Gives you a greater possibility to orientate the project
 - Increases your share in the project's budget
- **Being partner in a consortium:**
 - This should be preferred by organisations having no experience in the management of EU funds
 - More limited management burden
 - It is an excellent way to gain experience before developing your own project
 - However, the commitment it implies for your organisation in terms of work and contribution should not be underestimated
 - To become a partner in a consortium, networking and visibility are key
 - Attend conferences, Infodays and other networking events
 - Develop an English version of your Website and register in partner search engines

Brainstorming

- Brainstorming is a very useful technique to find a good project idea
 - It helps thinking “out of the box”
 - It fosters creative and innovative ideas
 - It is the first occasion to gather together the project development team
- Who should participate?
 - All those who will bring an added value:
 - Organisation’s staff: CEO, policy officers, interns, etc.
 - Potential beneficiaries
 - Potential partners
 - All the persons who shall implement the project in future: project manager, communication officer, administration, etc.

Weighing the pros and cons

- Submitting a proposal is a **highly time-consuming task** that will increase the workload of your team.
- **Your preparatory work will NOT be paid** (e.g. the time for reading all the call-related documents and completing the application form)
- Before filling in the various forms, you must already know the general “shape” of your project
- Make sure that participation in the call will help the development of your organisation and corresponds to your **strategic objectives**
- **The time factor** is essential: make sure you can realistically implement the various preparatory phases and submit a quality proposal in the required timeframe

C. Development of a Project Proposal step-by-step

Building a strong partnership

- EU funding programmes managed by the Commission, usually require a European partnership (consortium)
 - Organisations from various EU (or third) countries
 - The minimum number of organisations/countries is indicated in the call for proposals and varies according to the call
- A strong partnership is as important as a good project idea
 - Your partners will be your colleagues for 1,2,3 or even 4 years
 - The success of the project will depend on their contribution
 - Meet your potential partners before submitting the project
 - **Involve them from the beginning of the project development, to increase their ownership and benefit from their input**

Building a strong partnership



- How to identify potential partners?
 - Previous fruitful collaboration or relationship
 - Ask your actual partners to introduce you to other organisations they work with and trust (networking)
 - Participate in networking events (Infodays, conferences, workshops, etc.)
 - Use the partner search instruments made available by the Managing authorities (e.g. [EU research projects](#))
- Main selection criteria
 - **Complementarity** of profiles, experiences, contacts, etc., so that the partnership includes all the competences you need to implement the project
 - **Reliability & genuine interest** in the project's results

Building a strong partnership

- How many partners?
 - Find a balance between:
 - Increasing the score of your proposal: the Commission often privileges projects with a wide geographic impact.
 - Maintaining a sustainable partnership: lots of partners make the project more extensive and difficult to manage.
- From which countries?
 - The countries represented in your partnership must be coherent with your project's objectives (e.g. Inclusion of a European organisation based in Brussels to input into an EU policy) and possibly of including different kinds of countries (large and small ones, older and newer EU Member States, etc.)
 - Avoid having more than 2 partners from the same country

Building a strong partnership



- Practical exercise: Analyse good partnerships
 - Methodology:
 - Half of the participants will work on the project “[We love eating](http://www.we-love-eating.eu/en/the-campaign/who-we-are)” (www.we-love-eating.eu/en/the-campaign/who-we-are), and the other half on the project “[Nearly Zero Energy Hotels](http://www.nezeh.eu/partners/index.html) (neZEH)” (www.nezeh.eu/partners/index.html)
 - Work in pairs on Internet (*5 min*)
 - Volunteers share their conclusions (*5 + 5 min*)
 - Question: Why are the partnerships of these projects especially good?

Building a strong partnership



The screenshot shows a web browser window with the address bar displaying "www.we-love-eating.eu/en/the-campaign/who-we-are". The page content is organized into three main sections: "City partners", "Other organisations involved", and "The Consortium".

City partners

- [Banská Bystrica \(Slovakia\)](#)
- [Bradford \(United Kingdom\)](#)
- [Cluj-Napoca \(Romania\)](#)
- [Deventer \(Netherlands\)](#)
- [Granollers \(Spain\)](#)
- [Poznań \(Poland\)](#)
- [Rancq \(France\)](#)

Other organisations involved

- [Euro-Toque - Euro-Toques International \(ETI\)](#)
- [Generalitat de Catalunya](#)
- [AGE Platform Europe](#)
- [The European Network of Health Promoting Schools \(ENHPS\)](#)
- [SHE Network](#)
- [The European Nutrition for Health Alliance](#)
- [Vivons en Forme](#)

The Consortium

- [P.A.U. Education](#) (as leader of the Consortium) has been working in the fields of education and communication for over 17 years. P.A.U. Education brings extensive experience in creating and implementing communication campaigns and educative projects in both formal and informal settings all over Europe. In regards to health, P.A.U. Education was the coordinator of the Shape Up project, co-financed by DG SANCO and implemented in 20 European countries.
- [GfK - Growth from Knowledge](#) is one of the world's largest full-service research companies, founded in 1934. 11,500 GfK experts work to discover new insights about the way people live and think in over 100 markets every day, via qualitative, quantitative or mixed methods.
- [CBO - Dutch Institute for Healthcare Improvement](#) is an international centre for expertise and innovation in health care. Its principle aim is to develop, implement and review the quality of health care in the Netherlands and throughout Europe. CBO aims to support professionals in the field of practice, policy and research through its own action research, innovation, development and implementation of health promotion. CBO is a respected partner in many European research projects funded by DG SANCO and DG Employment, Social Affairs and Inclusion and by the FP7 programme.

At the bottom of the page, a disclaimer states: "The information and views set out on this website are those of the author(s) (P.A.U. Education and CBO) and do not necessarily reflect the official opinion of the".

On the right side of the page, there is a red rectangular box with the text "Find out how healthy you are" and a button labeled "Take the survey".

The browser's taskbar at the bottom shows various icons, including the Windows Start button, Internet Explorer, and several application icons. The system clock in the bottom right corner indicates the time as 14:30 on 18/11/2014.











Building a strong partnership



Boîte de réception (10 328) ... x Mardi 18 novembre 2014 - ... x Who we are | We love eating x PARTNERS | nezeh.eu x +

www.nezeh.eu/partners/index.html

The Nearly Zero Energy Hotels (neZEH) is led by a consortium of 10 committed partners from 7 EU Member States. The consortium holds a wealth of experience from various complementary fields aiming at building an integrated approach, adapted to the hotel sector needs.

-  **Project Coordinator**
Technical University of Crete, School of Environmental Engineering
Renewable and Sustainable Energy Systems Lab
Greece
-  United Nations World Tourism Organization
-  Network of European Regions for a Sustainable and Competitive Tourism
-  Federation of European Heating and Air-conditioning Associations
-  Agency of Braşov for Energy Management and Environment Protection
Romania
-  Creara Consultores S.L.
Spain
-  ENERGIES 2050
France
-  Energy Institute Hrvoje Požar
Croatia
-  Istituto Superiore sui Sistemi Territoriali per l'Innovazione
Italy
-  Sustainable Innovation
Sweden

14:37 18/11/2014

General goal / Specific objectives

- General goal or aim of the project
 - To which broad objective will your project contribute?
 - Example: Improving the quality of the service provided to foreign tourists in hotels and restaurants
 - The choice of this objective must rely on an analysis of the target group's needs carried out by your organisation or based on documents such as official reports (rationale of the project)
 - The general goal must be relevant to the objectives of the call for proposal

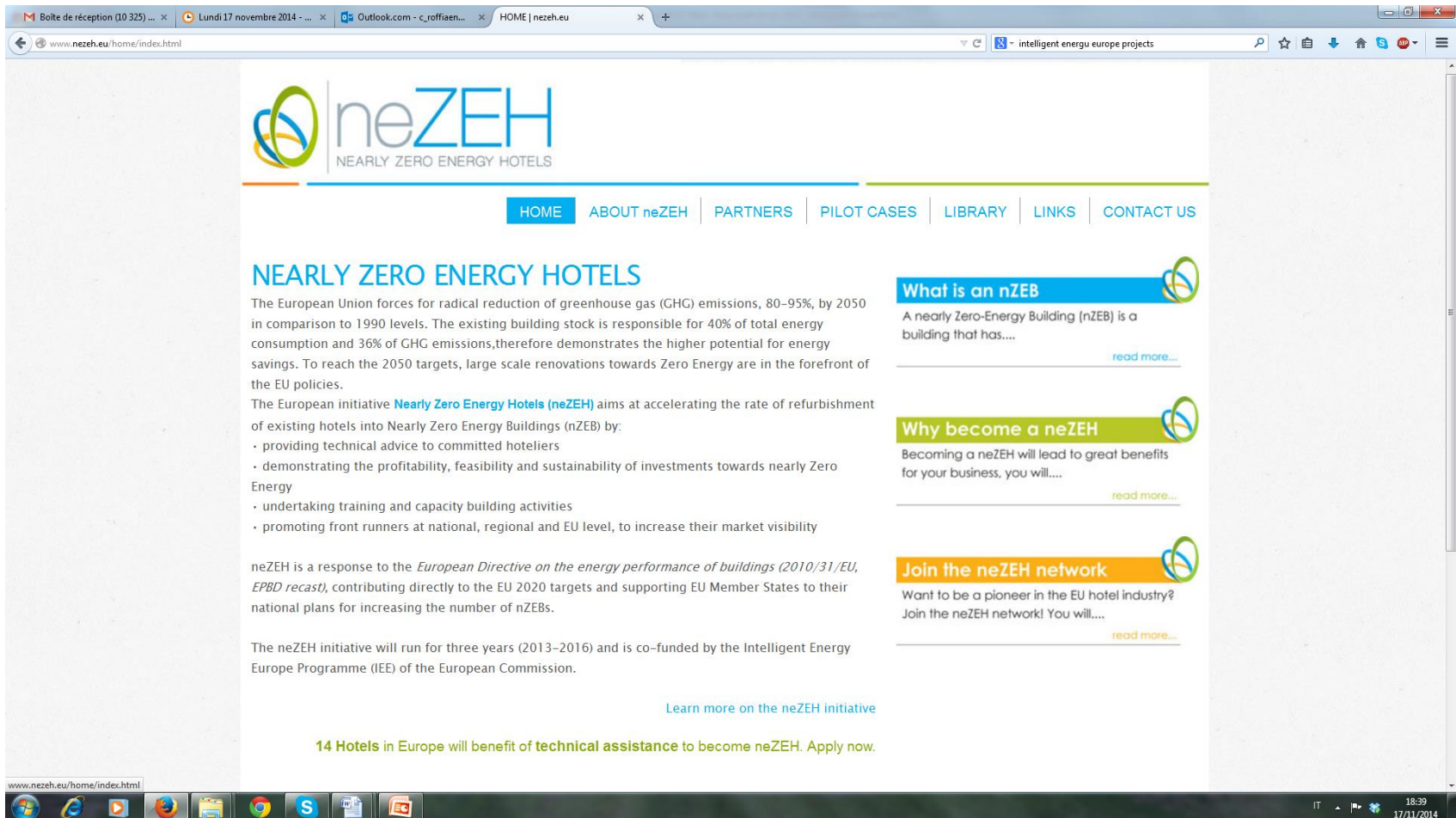
General goal / Specific objectives

- Specific objectives
 - They shall be very concrete and connected to the project's expected results
 - They must all contribute to the project's general goal and must be relevant to the objectives of the call for proposal
 - Their achievement should be realistic
 - There should not be more than 3 or 4 goals and these must be logically ordered
 - The goals must be proportionate to the dimension and resources of the project
 - The goals should include numbers

General goal / Specific objectives

- Practical exercise
 - Read the short presentation of the [neZEH project](#) & answer the questions (*5 min*)
 - What are:
 - The project's general goal?
 - The project's specific objectives?
 - Volunteers share their answers (*10 min*)

General goal / Specific objectives



The screenshot shows the homepage of the neZEH (Nearly Zero Energy Hotels) website. The page is titled "NEARLY ZERO ENERGY HOTELS" and features a navigation menu with links to HOME, ABOUT neZEH, PARTNERS, PILOT CASES, LIBRARY, LINKS, and CONTACT US. The main content area is divided into three columns. The left column contains the neZEH logo and a detailed description of the initiative, including its goals and the types of support provided to hoteliers. The middle column contains a section titled "What is an nZEB" with a brief definition and a "read more..." link. The right column contains two sections: "Why become a neZEH" and "Join the neZEH network", both with brief descriptions and "read more..." links. At the bottom of the page, there is a green banner stating "14 Hotels in Europe will benefit of technical assistance to become neZEH. Apply now." and a link to "Learn more on the neZEH initiative".

NEARLY ZERO ENERGY HOTELS

The European Union forces for radical reduction of greenhouse gas (GHG) emissions, 80–95%, by 2050 in comparison to 1990 levels. The existing building stock is responsible for 40% of total energy consumption and 36% of GHG emissions, therefore demonstrates the higher potential for energy savings. To reach the 2050 targets, large scale renovations towards Zero Energy are in the forefront of the EU policies.

The European initiative **Nearly Zero Energy Hotels (neZEH)** aims at accelerating the rate of refurbishment of existing hotels into Nearly Zero Energy Buildings (nZEB) by:

- providing technical advice to committed hoteliers
- demonstrating the profitability, feasibility and sustainability of investments towards nearly Zero Energy
- undertaking training and capacity building activities
- promoting front runners at national, regional and EU level, to increase their market visibility

neZEH is a response to the *European Directive on the energy performance of buildings (2010/31/EU, EPBD recast)*, contributing directly to the EU 2020 targets and supporting EU Member States to their national plans for increasing the number of nZEBs.

The neZEH initiative will run for three years (2013–2016) and is co-funded by the Intelligent Energy Europe Programme (IEE) of the European Commission.

[Learn more on the neZEH initiative](#)

14 Hotels in Europe will benefit of technical assistance to become neZEH. Apply now.

What is an nZEB

A nearly Zero-Energy Building (nZEB) is a building that has....

[read more...](#)

Why become a neZEH

Becoming a neZEH will lead to great benefits for your business, you will....

[read more...](#)

Join the neZEH network

Want to be a pioneer in the EU hotel industry? Join the neZEH network! You will....

[read more...](#)

Outputs & activities

- Vocabulary
 - **Outputs:** the concrete results (events, websites, training courses, etc.) envisaged to achieve the project specific objectives, through the implementation of a number of planned activities.
 - **Activities:** a set of tasks carried out in order to produce the expected results.
 - Remark: The outputs tend to have replaced the “work packages” in the terminology used by the Commission

Outputs & activities

- Example: Study of the [CommonS project's](#) output O13 (p. 54)
 - CommonS' project is aimed at developing a co-learning and e-mentoring Virtual Community of Practice aimed at improving the employability skills of participants
 - This is a Strategic partnership addressing more than one field (Higher education and Adult Education)
 - Proposal submitted in April 2014 to the Italian Erasmus + National Agency (Indire)
 - Received a very high score (91,5 out of 100)
 - Includes 6 partners from 4 countries (IT, PT, UK, BE)
 - 2 universities
 - 3 SMEs
 - 1 non-profit mentoring organisation

Communication & dissemination plan

- **Vocabulary:**
 - **Dissemination plan:** all the activities aimed at spreading the **project's results** among the identified target groups
 - **Communication plan:** all the activities aimed at **promoting the project** (visibility activities) and its results among the identified target groups
- **Essential but underestimated**
 - The European Commission expects the impact of the funded projects to be optimised, especially by means of efficient dissemination of the results
 - The importance of an efficient communications plan is very often underestimated by project promoters
 - A proper communication strategy is thus a very clear asset when your proposal is reviewed by an evaluator

Communication & dissemination plan

- Characteristics of a good communication strategy
 - It has to be set up and implemented from the outset of the project
 - It must include communication means and activities adapted to the project's different target groups
 - It may include quantitative indicators (e.g. no. of people who will be reached by a communication action, no. of press-releases that will be published, etc.)
- **Best practice:** the communication strategy of the [Nearly Zero-Energy Hotels](#) (NEZEH) project

Ensuring the project's sustainability



- The sustainability plan of an EU project includes:
 - Its **financial sustainability** after the funding period is over
 - The **exploitation of its results** after the project's end
- Why is it essential?
 - Increasingly, the European Commission expects a long-term impact from funded projects
 - The sustainability plan guarantees that the promoters have a real interest in the project's objectives and outputs, and are not only driven by EU money
 - Defining a credible sustainability plan is another asset highly valued by evaluators

Budget

- All EU projects are co-funded
 - The EU funding rate usually varies between 50 and 80%
 - The project partners must co-finance the rest through
 - contributions in staff and/or cash (no “in kind” contributions)
 - other funding sources (public or private grants)
 - More and more flat-rate funding but, as a rule, EU funding never covers 100 % of the project’s costs.
- There are different kinds of budgets
 - Completely based on real costs (less and less)
 - Completely based on flat-rates (lump sums)
 - Based on a mix of both

Budget

- Analysis of a budget based on real costs
 - Staff costs
 - Based on the daily cost of each employee from the applicant or the partners contributing to the project implementation
 - The daily cost is calculated dividing the annual cost of the employee for the organisation / 220 days
 - General Expenditure – Flat rate (7% in this case)
 - All the other costs (travel expenses & subsistence costs; production, communication and dissemination costs; event costs) must be as realistic as possible
 - The money which is not spent is lost
 - Ask your administration to provide you with this information based on their experience

Budget

- Analysis of a mixed budget: [CommonS project](#) (pp. 56 to 65)
 - Lump sums
 - Staff costs (project management & production of outputs)
 - Project meetings (travel & accommodation costs of partners)
 - Learning, teaching & training activities
 - Real costs
 - Participants with special needs: 100 % of these costs are covered by the EU funding
 - Exceptional costs (subcontracting or purchase of goods and services): 75% of these costs are covered by the EU funding, within a ceiling of €50.000 per project