



EUROPEAN COMMISSION

Executive Agency for Small and Medium-sized Enterprises (EASME)

Director

SPECIFIC AGREEMENT

NUMBER — 671777 — SME2EU

This ‘**Specific Agreement**’ is **between** the following parties:

on the one part,

the **Executive Agency for Small and Medium-sized Enterprises (EASME)** ('the Agency'), under the power delegated by the European Commission ('the Commission'),

represented for the purposes of signature of this Specific Agreement by Jose PUIGPELAT VALLS, Head of Unit , or his duly authorised representative,

and

on the other part,

1. ‘the coordinator’:

PROMOFIRENZE AZIENDA SPECIALE DELLACAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI FIRENZE (METROPOLI) IT14, 607483CF06178350481, established in VIA CASTELLO D ALTAFRONTE 11, FIRENZE 50122, Italy, IT06178350481, represented for the purposes of signing the Agreement by Claudio BIANCHI

and the following other partners, represented for the purposes of signing the Specific Agreement by the coordinator (see the mandate in Annex 3 of the Framework Partnership Agreement and Article 55 of the Framework Partnership Agreement):

2. **CONFINDUSTRIA TOSCANA (Confindustria Toscana)** IT2, CF80003010487, established in PIAZZA DELLA REPUBBLICA 6 PALAZZO LEVI, FIRENZE 50123, Italy,

3. **EUROSPORTELLLO CONFESERCENTI (Eurosportello Confesercenti)** IT4, FI430899, established in VIA PISTOIESE 155, FIRENZE 50145, Italy, IT02146090481,

4. **CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO (CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO)**, established in VIA LUIGI MERCANTINI 25, ASCOLI PICENO 63100, Italy, IT00253810444,

5. **ASSOCIAZIONE COMPAGNIA DELLE OPERE DI PESARO (Compagnia delle Opere Pesaro Urbino)** IT2, established in VIA BARIGNANI 30, PESARO 61100, Italy, IT92010350418,

6. **Centro Estero Umbria (CENTROESTEROUMBRIA)** IT2, 1167CF02156340545, established in VIA CACCIATORI DELLE ALPI 42, PERUGIA 06121, Italy, IT02156340545,



7. SOCIETA REGIONALE PER LO SVILUPPO ECONOMICO DELL UMBRIA - SVILUPPUMBRIA SPA (SVILUPPUMBRIA SPA) SPA, 102952CF00267120541, established in VIA DON BOSCO 11, PERUGIA 06121, Italy, IT00267120541,

By entering into the Specific Agreement, the partners accept the grant and agree to implement the specific action, under their own responsibility and in accordance with the Framework Partnership Agreement and this Specific Agreement, with all the obligations and conditions they set out.

The Specific Agreement is composed of:

Terms and Conditions

- | | |
|---------|---|
| Annex 1 | Description of the action |
| Annex 2 | Estimated budget for the action |
| Annex 3 | Model for the financial statements |
| Annex 4 | Model for the certificate on the financial statements |



TERMS AND CONDITIONS

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CHAPTER 1 GENERAL

ARTICLE 1 — SUBJECT OF THE AGREEMENT

This Agreement sets out the specific terms and conditions and rights and obligations applicable to the specific grant awarded to the partners for implementing a specific COSME EEN action under the Framework Partnership Agreement No 649295 - *SME2EU* ('**Framework Partnership Agreement (EEN FPA)**').

CHAPTER 2 ACTION

ARTICLE 2 — ACTION TO BE IMPLEMENTED

The specific COSME EEN action to be implemented is entitled '*Small and Medium Enterprises To European Union — SME2EU*' ('**action**') and is described in Annex 1.

ARTICLE 3 — DURATION AND STARTING DATE OF THE ACTION

The duration of the specific action will be **24 months** as of *1 January 2015* ('**starting date of the action**').

CHAPTER 3 SPECIFIC GRANTS

ARTICLE 4 — GRANT AMOUNT, FORM OF GRANT, REIMBURSEMENT RATES AND FORMS OF COSTS

4.1 Maximum grant amount

The '**maximum grant amount**' for the specific grant is **EUR 1,155,893.00** (one million one hundred and fifty five thousand eight hundred and ninety three EURO).

4.2 Form of grant, reimbursement rates and forms of costs

The grant reimburses **60% of the action's eligible costs** (see Article 5) ('**reimbursement of eligible costs**') (see Annex 2).

The estimated eligible costs of the action are **EUR 1,926,488.32** (one million nine hundred and twenty six thousand four hundred and eighty eight EURO and thirty two eurocents).

Eligible costs (see Article 5) must be declared under the following forms ('**forms of costs**' or '**cost forms**')

(a) for **direct personnel costs**:

- as actually incurred costs ('**actual costs**') or
- on the basis of an amount per unit calculated by the partner in accordance with its usual cost accounting practices ('**unit costs**').



- (b) for **direct costs for subcontracting**: as actually incurred costs (**actual costs**);
- (c) for **direct costs of providing financial support to third parties**: not applicable;
- (d) for **other direct costs**: as actually incurred costs (**actual costs**);
- (e) for **indirect costs**: on the basis of a flat-rate applied as set out in Article 5.2, Point E (**'flat-rate costs'**);
- (f) specific cost category(ies): not applicable.

4.3 Final grant amount — Calculation

4.3.1 Step 1 — Application of the reimbursement rate to the eligible costs

The reimbursement rate (see Article 4.2) is applied to the eligible costs (actual costs, unit costs and flat-rate costs; see Article 5) declared by the beneficiaries *and linked third parties* (see Article 14) and approved by the Agency (see Article 15).

4.3.2 Step 2 — Limit to the maximum grant amount

If the amount obtained following Step 1 is higher than the maximum grant amount set out in Article 4.1, it will be limited to the latter.

4.3.3 Step 3 — Reduction due to the no-profit rule

The specific grant must not produce a profit.

'Profit' means the surplus of the amount obtained following Steps 1 and 2 plus the action's total receipts, over the action's total eligible costs.

The **'action's total eligible costs'** are the consolidated total eligible costs approved by the Agency.

The **'action's total receipts'** are the consolidated total receipts generated during its duration (see Article 3).

The following are considered **receipts**:

- (a) income generated by the action;
- (b) financial contributions given by third parties to the beneficiary *or to a linked third party*, specifically to be used for costs that are eligible under the specific action.

The following are however **not** considered receipts:

- (a) financial contributions by third parties, if they may be used to cover costs other than the eligible costs (see Article 5);
- (b) financial contributions by third parties with no obligation to repay any amount unused at the end of the period set out in Article 3;

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



4.3.4 Step 4 — Reduction due to improper implementation or breach of other obligations — Reduced grant amount — Calculation

If the grant is reduced (see Article 42 EEN FPA), the Agency will calculate the reduced grant amount by deducting the amount of the reduction (calculated in proportion to the improper implementation of the action or to the seriousness of the breach of obligations in accordance with Article 42.2) from the maximum grant amount set out in Article 4.1.

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

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

4.4 Revised final grant amount — Calculation

If — after the payment of the balance (in particular, after checks, reviews, audits or investigations; see Article 28 EEN FPA) — the Agency rejects costs (see Article 41 EEN FPA) or reduces the grant (see Article 42 EEN FPA), it will calculate the ‘**revised final grant amount**’ for the action.

This **amount** is calculated by the Agency on the basis of the findings, as follows:

- in case of **rejection of costs**: by applying the reimbursement rate to the *revised* eligible costs approved by the Agency for the action, limiting it to the maximum grant amount and making a reduction if there is a profit (see Article 4.3);
- in case of **reduction of the grant**: by deducting the amount of the reduction (calculated in proportion to the improper implementation of the action or to the seriousness of the breach of obligations in accordance with Article 42.2 EEN FPA) from the maximum grant amount set out in Article 4.1.

In case of **rejection of costs and reduction of the specific grant**, the revised final grant amount for the action will be the lower of the two amounts above.

ARTICLE 5 — ELIGIBLE AND INELIGIBLE COSTS

5.1 General conditions for costs to be eligible

‘**Eligible costs**’ are costs that meet the following criteria:

(a) for **actual costs**:

- (i) they must be actually incurred by the partnerz;
- (ii) they must be incurred in the period set out in Article 3, with the exception of costs relating to the submission of the final report (see Article 14);
- (iii) they must be indicated in the estimated budget set out in Annex 2;
- (iv) they must be incurred in connection with the specific action as described in Annex 1 and necessary for its implementation;



- (v) they must be identifiable and verifiable, in particular recorded in the partner's accounts in accordance with the accounting standards applicable in the country where the partner is established and with the partner's usual cost accounting practices;
- (vi) they must comply with the applicable national law on taxes, labour and social security, and
- (vii) they must be reasonable, justified and must comply with the principle of sound financial management, in particular regarding economy and efficiency;

(b) for **unit costs**:

- (i) they must be calculated as follows:

{amounts per unit set out in Annex 2 or calculated by the partner in accordance with its usual cost accounting practices (see Article 5.2, Point A)}

multiplied by

the number of actual units};

- (ii) the number of actual units must comply with the following conditions:

- the units must be actually used or produced in the period set out in Article 3;
- the units must be necessary for implementing the specific action or produced by it, and
- the number of units must be identifiable and verifiable, in particular supported by records and documentation (see Article 24 EEN FPA);

(c) for **flat-rate costs**:

- (i) they must be calculated by applying the flat-rate set out in Annex 2, and
- (ii) the costs (actual costs or unit costs) to which the flat-rate is applied must comply with the conditions for eligibility set out in this Article.

5.2 Specific conditions for costs to be eligible

Costs are eligible, if they comply with the general conditions (see above) and the specific conditions set out below for each of the following budget categories:

- A. direct personnel costs;
- B. direct costs of subcontracting;
- C. not applicable;
- D. other direct costs;
- E. indirect costs.
- F. not applicable;

'Direct costs' are costs that are directly linked to the action implementation and can therefore be attributed to it directly. They must not include any indirect costs (see Point E below).



‘Indirect costs’ are costs that are not directly linked to the specific action implementation and therefore cannot be attributed directly to it.

A. Direct personnel costs

Types of eligible personnel costs

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

Partners may also declare as personnel costs **additional remuneration** for personnel assigned to the specific action (including payments on the basis of supplementary contracts regardless of their nature), if:

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

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

- (a) the person works under the partner’s instructions and, unless otherwise agreed with the partner, on the partner’s premises;
- (b) the result of the work carried out belongs to the partner, and
- (c) the costs are not significantly different from those for personnel performing similar tasks under an employment contract with the partner.

A.3 The costs of personnel seconded by a third party against payment

Not applicable

A.4 Costs of owners of partners that are small and medium-sized enterprises (**‘SME owners’**)

Not applicable

A.5 Costs of **‘partners that are natural persons’** not receiving a salary

Not applicable

Calculation

Personnel costs must be calculated by the partner as follows:



{hourly rate
multiplied by
the number of actual hours worked on the specific action}.

The number of actual hours declared for a person must be identifiable and verifiable (see Article 24 EEN FPA).

The total number of hours declared in EU or Euratom grants, for a person for a year, cannot be higher than the annual productive hours used for the calculations of the hourly rate. Therefore, the maximum number of hours that can be declared for the specific grant are:

{the number of annual productive hours for the year (see below)
minus
total number of hours declared by the partner, for that person for that year, for other EU or Euratom grants}.

The ‘**hourly rate**’ is the amount calculated as follows:

(a) for personnel costs declared as **actual costs**: the hourly rate is the amount calculated as follows:

{actual annual personnel costs (excluding additional remuneration) for the person
divided by
number of annual productive hours}.

The partners must use the annual personnel costs and the number of annual productive hours for each financial year covered by the reporting period. If a financial year is not closed at the end of the reporting period, the partners must use the hourly rate of the last closed financial year available.

For the ‘number of annual productive hours’, the partners may choose one of the following:

- (i) ‘fixed number of hours’: 1 720 hours for persons working full time (or corresponding pro-rata for persons not working full time);
- (ii) ‘individual annual productive hours’: the total number of hours worked by the person in the year for the partner, calculated as follows:

{annual workable hours of the person (according to the employment contract, applicable collective labour agreement or national law)
plus
overtime worked
minus
absences (such as sick leave and special leave)}.

‘Annual workable hours’ means the period during which the personnel must be working, at the employer’s disposal and carrying out his/her activity or duties under the employment contract, applicable collective labour agreement or national working time legislation.



If the contract (or applicable collective labour agreement or national working time legislation) does not allow to determine the annual workable hours, this option cannot be used;

- (iii) ‘standard annual productive hours’: the ‘standard number of annual hours’ generally applied by the partner for its personnel in accordance with its usual cost accounting practices. This number must be at least 90% of the ‘standard annual workable hours’.

If there is no applicable reference for the standard annual workable hours, this option cannot be used.

For all options, the actual time spent on **parental leave** by a person assigned to the action may be deducted from the number of annual productive hours;

- (b) for personnel costs declared on the basis of **unit costs**: the hourly rate for personnel costs declared on the basis of the partner’s usual cost accounting practices is the hourly rate calculated by the partner in accordance with its usual cost accounting practices, provided that:

- the cost accounting practices used are applied in a consistent manner, based on objective criteria, regardless of the source of funding;
- the hourly rate is calculated using the actual personnel costs recorded in the partner’s accounts, excluding any ineligible cost or costs included in other budget categories.

The actual personnel costs may be adjusted by the partner on the basis of budgeted or estimated elements. Those elements must be relevant for calculating the personnel costs, reasonable and correspond to objective and verifiable information;

and

- the hourly rate is calculated using the number of annual productive hours (see above).

B. Direct costs of subcontracting (including related duties, taxes and charges, such as non-deductible value added tax (VAT) paid by the partner that is not a public body acting as public authority) are eligible if the conditions in Article 11.1.1 are met.

C. Direct costs of providing financial support to third parties

Not applicable

D. Other direct costs

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

D.2 The depreciation costs of equipment, infrastructure or other assets (new or second-hand) as recorded in the partner’s accounts are eligible, if they were purchased in accordance with



Article 8.1.1 and written off in accordance with international accounting standards and the partner's usual accounting practices.

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

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

D.3 Costs of other goods and services (including related duties, taxes and charges, such as non-deductible value added tax (VAT) paid by the partner) are eligible, if they are:

- (a) purchased specifically for the specific action and in accordance with Article 8.1.1
- (b) not applicable.

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

D.4 Capitalised and operating costs of 'large research infrastructure'

Not applicable

E. Indirect costs

Indirect costs are eligible if they are declared on the basis of the flat-rate of 25% of the eligible direct costs (see Article 4.2 and Points A to D above), from which are excluded:

- (a) costs of subcontracting.
- (b) not applicable;
- (c) not applicable;
- (d) not applicable;

Partners receiving an operating grant¹ financed by the EU or Euratom budget cannot declare indirect costs for the period covered by the operating grant.

F. Specific cost category(ies)

Not applicable

¹ For the definition, see Article 121(1)(b) of Regulation (EU, Euratom) No 955/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1505/2002 (OJ L 218, 25.10.2012, p.1) ('**Financial Regulation No 955/2012**'): '**operating grant**' means direct financial contribution, by way of donation, from the budget in order to finance the functioning of a body which pursues an aim of general EU interest or has an objective forming part of and supporting an EU policy.



5.3 Conditions for costs of linked third parties to be eligible

Not applicable

5.4 Ineligible costs

‘Ineligible costs’ are:

- (a) costs that do not comply with the conditions set out above (Article 5.1 to 5.3), in particular:
 - (i) costs related to return on capital;
 - (ii) debt and debt service charges;
 - (iii) provisions for future losses or debts;
 - (iv) interest owed;
 - (v) doubtful debts;
 - (vi) currency exchange losses;
 - (vii) bank costs charged by the partner’s bank for transfers from the Agency;
 - (viii) excessive or reckless expenditure;
 - (ix) deductible VAT;
 - (x) costs incurred during suspension of the implementation of the action (see Article 48 EEN FPA);
- (b) costs declared under another EU or Euratom grant (including grants awarded by a Member State and financed by the EU or Euratom budget and grants awarded by bodies other than the Agency for the purpose of implementing the EU or Euratom budget); in particular, indirect costs if the partner is already receiving an operating grant financed by the EU or Euratom budget in the same period.

5.5 Consequences of declaration of ineligible costs

Declared costs that are ineligible will be rejected (see Article 41 EEN FPA).

This may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

CHAPTER 4 RIGHTS AND OBLIGATIONS OF THE PARTIES

SECTION 1 RIGHTS AND OBLIGATIONS RELATED TO IMPLEMENTING THE SPECIFIC ACTION



ARTICLE 6 — RESOURCES TO IMPLEMENT THE ACTION — THIRD PARTIES INVOLVED IN THE ACTION

The partners must have the appropriate resources to implement the specific action.

If it is necessary to implement the specific action, the partners may:

- purchase goods, works and services (see Article 8);
- call upon subcontractors to implement action tasks described in Annex 1 (see Article 11);
- call upon linked third parties to implement action tasks described in Annex 1 (see Article 12).

In these cases, the partners retains sole responsibility towards the Agency and the other partners for implementing the specific action.

ARTICLE 7 — IMPLEMENTATION OF ACTION TASKS BY PARTNERS NOT RECEIVING EU FUNDING

Not applicable

ARTICLE 8 — PURCHASE OF GOODS, WORKS AND SERVICES

8.1 Rules for purchasing goods, works or services

8.1.1 If necessary to implement the specific action, the partners may purchase goods, works or services.

The partners must make such purchases ensuring the best value for money or, if appropriate, the lowest price. In doing so, they must avoid any conflict of interests (see Article 34 EEN FPA).

The partners must ensure that the Agency, the Commission, the European Court of Auditors (ECA) and the European Anti-fraud Office (OLAF) can exercise their rights under Articles 28 and 29 of the Framework Partnership Agreement also towards its contractors.

8.1.2 Partners that are a ‘contracting authority’ within the meaning of Directive 2004/18/EC² or ‘contracting entity’ within the meaning of Directive 2004/17/EC³ must comply with the applicable national law on public procurement.

8.2 Consequences of non-compliance

If a partner breaches any of its obligations under Article 8.1.1, the costs related to the contract concerned will be ineligible (see Article 5) and will be rejected (see Article 41 EEN FPA).

If a partner breaches any of its obligations under Article 8.1.2, the specific grant may be reduced (see Article 42 EEN FPA).

² Directive 2004/18/EC of the European Parliament and of the Council of 31 March 2004 on the coordination of procedures for the award of public work contracts, public supply contracts and public service contracts (OJ L 134, 30.04.2004, p. 114).

³ Directive 2004/17/EC of the European Parliament and of the Council of 31 March 2004 coordinating the procurement procedures of entities operating in the water, energy, transport and postal services sectors (OJ L 134, 30.04.2004, p. 1).



Such breaches may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

ARTICLE 9 — USE OF IN-KIND CONTRIBUTIONS PROVIDED BY THIRD PARTIES AGAINST PAYMENT

Not applicable

ARTICLE 10 — USE OF IN-KIND CONTRIBUTIONS PROVIDED BY THIRD PARTIES FREE OF CHARGE

Not applicable

ARTICLE 11 — IMPLEMENTATION OF ACTION TASKS BY SUBCONTRACTORS

11.1 Rules for subcontracting action tasks

11.1.1 If necessary to implement a specific action, the partners may award subcontracts covering the implementation of certain action tasks described in Annex 1.

Subcontracting may cover only a limited part of the specific action.

The partners must award the subcontracts ensuring the best value for money or, if appropriate, the lowest price. In doing so, they must avoid any conflict of interests (see Article 34 EEN FPA).

The tasks to be implemented and the estimated cost for each subcontract must be set out in Annex 1 and the total estimated costs of subcontracting per partner must be set out in Annex 2. The Agency may however approve subcontracts not set out in Annex 1 and 2 without amendment (see Article 54 EEN FPA), if:

- they are specifically justified in the periodic technical report, and
- they do not entail changes to the Specific Agreement which would call into question the decision awarding the specific grant or breach the principle of equal treatment of applicants.

The partners must ensure that the Agency, the Commission, the European Court of Auditors (ECA) and the European Anti-Fraud Office (OLAF) can exercise their rights under Articles 28 and 29 of the Framework Partnership Agreement also towards their subcontractors.

11.1.2 The partners must ensure that their obligations under Articles 34, 35, 37 and 45 of the Framework Partnership Agreement also apply to the subcontractors.

Partners acting as ‘contracting authority’ within the meaning of Directive 2004/18/EC or ‘contracting entity’ within the meaning of Directive 2004/17/EC, it must comply with the applicable national law on public procurement.

11.2 Consequences of non-compliance

If a partner breaches any of its obligations under Article 11.1.1, the costs related to the subcontract concerned will be ineligible (see Article 5) and will be rejected (see Article 41 EEN FPA).



If a partner breaches any of its obligations under Article 11.1.2, the specific grant may be reduced (see Article 42 EEN FPA).

Such breaches may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

ARTICLE 12 — IMPLEMENTATION OF ACTION TASKS BY LINKED THIRD PARTIES

12.1 Rules for calling upon linked third parties to implement part of the action

12.1.1 The linked third parties listed in Article 19 of the Framework Partnership Agreement may implement action tasks attributed to them in Annex 1.

They may declare as eligible the costs they incur for implementing the action tasks in accordance with Article 5.

The partners must ensure that the Agency, the Commission, the European Court of Auditors (ECA) and the European Anti-Fraud Office (OLAF) can exercise their rights under Articles 28 and 29 of the Framework Partnership Agreement also towards their linked third parties.

12.1.2 The partners must ensure that their obligations under Articles 24, 26, 34, 35 and 37 of the Framework Partnership Agreement also apply to their linked third party.

12.2 Consequences of non-compliance

If any obligation under Article 12.1.1 is breached, the costs of the linked third party will be ineligible (see Article 5) and will be rejected (see Article 41 EEN FPA).

If any obligation under Article 12.1.2 is breached, the specific grant may be reduced (see Article 42 EEN FPA).

Such breaches may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

SECTION 2 RIGHTS AND OBLIGATIONS RELATED TO THE GRANT ADMINISTRATION

ARTICLE 13 — SUBMISSION OF DELIVERABLES

13.1 Obligation to submit deliverables

The coordinator must submit:

- the following ‘**progress report(s)**’:
- any other ‘**deliverables**’ identified in Annex 1, in accordance with the timing and conditions set out in it.



13.2 Consequences of non-compliance

If the coordinator breaches any of its obligations under this Article, the Agency may apply any of the measures described in Section 5 of the Framework Partnership Agreement.

ARTICLE 14 — REPORTING — PAYMENT REQUESTS

14.1 Obligation to submit reports

The coordinator must submit to the Agency (see Article 51 EEN FPA) the final report set out in this Article. This report includes the request for payment and must be drawn up using the forms and templates provided in the electronic exchange system (see Article 51 EEN FPA).

14.2 Reporting periods

The specific action has one ‘**reporting periods**’:

- RP1: from month 1 to month 24

14.3 Periodic reports — Requests for interim payments

Not applicable

14.4 Final report — Request for payment of the balance

The coordinator must submit to the Agency (see Article 51 EEN FPA) — within 60 days following the end of the reporting period — a final report, which includes the request for payment of the balance.

The **final report** must include the following:

(a) a ‘**final technical report**’ containing:

- (i) an **explanation of the work carried out** by the partners;
- (ii) an **overview of the progress** towards the objectives of the specific action, including milestones and deliverables identified in Annex1.

This report must include explanations justifying the differences between work expected to be carried out in accordance with Annex 1 and that actually carried out.

- (iii) a **summary** for publication by the Agency;
- (iv) not applicable;

(b) a ‘**final financial report**’ containing:

- (i) an ‘**individual financial statement**’ (see Annex 3) from each partner *and from each linked third party*, for the reporting period.

The individual financial statement must detail the eligible costs (actual costs, unit costs, flat-rate costs; see Article 5) for each budget category (see Annex 2).



The partners [and linked third parties] must declare all eligible costs, even if — for actual costs, unit costs and flat-rate costs — they exceed the amounts indicated in the estimated budget (see Annex 2). Amounts which are not declared in the individual financial statement will not be taken into account by the Agency.

The individual financial statement must also detail the receipts of the specific action (see Article 4.3.3).

Each partner *and each linked third party* must certify that:

- the information provided is full, reliable and true;
 - the costs declared are eligible (see Article 5);
 - the costs can be substantiated by adequate records and supporting documentation (see Article 24 EEN FPA) that will be produced upon request (see Article 23 EEN FPA) or in the context of checks, reviews, audits and investigations (see Article 28 EEN FPA), and
 - that all the receipts have been declared (see Article 4.3.3);
- (ii) an **explanation of the use of resources** and the information on subcontracting (see Article 11) from each partner *and from each linked third party*, for the reporting period;
- (iii) a ‘**final summary financial statement**’ (see Annex 3), created automatically by the electronic exchange system, consolidating the individual financial statements and including the request for payment of the balance and
- (iv) a ‘**certificate on the financial statements**’ (drawn up in accordance with Annex 4) for each partner *and for each linked third party*, if :
- it requests a total contribution of EUR 325 000 or more as reimbursement of actual costs and
 - the maximum EU contribution indicated, for that partner *or linked third party*, in the estimated budget (see Annex 2) as reimbursement of actual costs is EUR 750 000 or more.

14.5 Information on cumulative expenditure incurred

Not applicable

14.6 Currency for financial statements and conversion into euro

Financial statements must be drafted in euro.

Partners *and linked third parties* with accounting established in a currency other than the euro must convert the costs recorded in their accounts into euro, at the average of the daily exchange



rates published in the C series of the *Official Journal of the European Union*, calculated over the corresponding reporting period.

If no daily euro exchange rate is published in the *Official Journal of the European Union* for the currency in question, they must be converted at the average of the monthly accounting rates published on the Commission's website, calculated over the corresponding reporting period.

Partners *and linked third parties* with accounting established in euro must convert costs incurred in another currency into euro according to their usual accounting practices.

14.7 Language of reports

The report (technical and financial report, including financial statements) must be submitted in the language of the Specific Agreement.

14.8 Consequences of non-compliance — Suspension of the payment deadline — Termination

If the report submitted does not comply with this Article, the Agency may suspend the payment deadline (see Article 46 EEN FPA) and apply any of the other measures described in Section 5 of the Framework Partnership Agreement.

If the coordinator breaches its obligation to submit the report and if it fails to comply with this obligation within 30 days following a written reminder sent by the Agency, the Specific Agreement may be terminated (see Article 49 EEN FPA).

ARTICLE 15 — PAYMENTS AND PAYMENT ARRANGEMENTS

15.1 Payments to be made

The following payments will be made to the coordinator:

- one **pre-financing payment**;
- one **payment of the balance**, on the basis of the request for payment of the balance (see Article 14).

15.2 Pre-financing payment — Amount — *Pre-financing guarantee*

The aim of the pre-financing is to provide the partners with a float.

It remains the property of the EU until the payment of the balance.

The amount of the pre-financing payment will be **EUR809,125.10** (*eight hundred and nine thousand one hundred and twenty five EURO and ten eurocents*).

*The payment of the pre-financing will be conditional on receipt of a financial guarantee of **EUR53,565.83** (fifty three thousand five hundred and sixty five EURO and eighty three eurocents), that fulfils the following conditions:*

- (a) *it is provided by a bank or an approved financial institution or — if requested by the coordinator and accepted by the Agency — by a third party;*



(b) the guarantor stands as first-call guarantor and does not require the Agency (or Commission) to first have recourse against the principal debtor (i.e. the partner concerned), and

(c) it provides that it explicitly remains in force until the payment of the balance and, if the payment of the balance takes the form of recovery, until three months after the debit note is notified to a partner.

The guarantee will be released within the following month.

The Agency will — except if Article 47 of the Framework Partnership Agreement applies — make the pre-financing payment to the coordinator within 30 days, either from the entry into force of the Specific Agreement (see Article 20) or from 10 days before the starting date of the specific action (see Article 3) or from the receipt of the pre-financing guarantee, whichever is the latest.

15.3 Interim payments — Amount — Calculation

Not applicable

15.4 Payment of the balance — Amount — Calculation

The payment of the balance reimburses the remaining part of the eligible costs incurred by the partners for the implementation of the specific action.

If the total amount of earlier payments is greater than the final grant amount (see Article 4.3), the payment of the balance takes the form of a recovery (see Article 43 EEN FPA).

If the total amount of earlier payments is lower than the final grant amount, the Agency will pay the balance within 90 days from receiving the final report (see Article 14), except if Articles 46 or 47 of the Framework Partnership Agreement apply.

Payment is subject to the approval of the final report. Its approval does not imply recognition of the compliance, authenticity, completeness or correctness of its content.

The **amount due as the balance** is calculated by the Agency by deducting the total amount of pre-financing already made, from the final grant amount determined in accordance with Article 4.3:

{final grant amount (see Article 4.3)}

minus

{pre-financing made}}.

If the balance is positive, it will be paid to the coordinator.

The amount to be paid may however be offset — without the partner's consent — against any other amount owed by the partner to the Agency, the Commission or another executive agency (under the EU or Euratom budget), up to the maximum EU contribution indicated, for that partner, in the estimated budget (see Annex 2).

If the balance is negative, it will be recovered.



15.5 Notification of amounts due

When making payments, the Agency will formally notify to the coordinator the amount due and specify the final grant amount.

In the case of reduction of the specific grant or recovery of undue amounts, the notification will be preceded by the contradictory procedure set out in Articles 42 and 43 of the Framework Partnership Agreement.

15.6 Currency for payments

The Agency will make all payments in euro.

15.7 Payments to the coordinator — Distribution to the partners

Payments will be made to the coordinator.

Payments to the coordinator will discharge the Agency from its payment obligation.

The coordinator must distribute the payments between the partners without unjustified delay.

Pre-financing may however be distributed only:

- (a) if the minimum number of partners set out in the call for proposals has acceded to the Framework and Specific Agreement (see Article 55 EEN FPA) and
- (b) to partners that have entered into the Specific Agreement (see Article 55 EEN FPA).

15.8 Bank account for payments

All payments will be made to the following bank account:

Name of bank: CASSA DI RISPARMIO DI FIRENZE S.P.A.

Address of branch: VIA BUFALINI, 4 FIRENZE, Italy

Full name of the account holder: PROMOFIRENZE AZIENDA SPECIALE DELLA CAMERA DI COMERCIO DI FIRENZE

Full account number (including bank codes):

IBAN code: IT18X0616002800100000009951

15.9 Costs of payment transfers

The cost of the payment transfers is borne as follows:

- the Agency bears the cost of transfers charged by its bank;
- the partner bears the cost of transfers charged by its bank;
- the party causing a repetition of a transfer bears all costs of the repeated transfer.

15.10 Date of payment

Payments by the Agency are considered to have been carried out on the date when they are debited to its account.



15.11 Consequences of non-compliance

15.11.1 If the Agency does not pay within the payment deadlines (see above), the partners are entitled to **late-payment interest** at the rate applied by the European Central Bank (ECB) for its main refinancing operations in euros ('reference rate'), plus three and a half points. The reference rate is the rate in force on the first day of the month in which the payment deadline expires, as published in the C series of the *Official Journal of the European Union*.

If the late-payment interest is lower than or equal to EUR 200, it will be paid to the coordinator only upon request submitted within two months of receiving the late payment.

Late-payment interest is not due if the partners are EU Member States (including regional and local government authorities or other public bodies acting on behalf of a Member State for the purpose of the Framework Partnership Agreement and the Specific Agreement).

Suspension of the payment deadline or payments (see Articles 46 and 47 EEN FPA) will not be considered as late payment.

Late-payment interest covers the period running from the day following the due date for payment (see above), up to and including the date of payment.

Late-payment interest is not considered for the purposes of calculating the final grant amount.

15.11.2 If the coordinator breaches any of its obligations under this Article, the specific grant may be reduced (see Article 42 EEN FPA) and the Specific Agreement or the participation of the coordinator may be terminated (see Article 49 EEN FPA).

Such breaches may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

SECTION 3 RIGHTS AND OBLIGATIONS RELATED TO PRE-EXISTING RIGHTS (BACKGROUND) AND RESULTS

ARTICLE 16 — PRE-EXISTING RIGHTS AND OWNERSHIP OF THE RESULTS (INCLUDING INTELLECTUAL AND INDUSTRIAL PROPERTY RIGHTS)

16.1 Pre-existing rights and access rights to pre-existing rights

Where industrial and intellectual property rights (including rights of third parties) exist prior to the Agreement, the partners must establish a list of these pre-existing industrial and intellectual property rights, specifying the owner and any persons that have a right of use.

The coordinator must — before starting the action — submit this list to the Agency.

The partners must give each other (and their linked third parties) access to any pre-existing industrial and intellectual property rights needed for the implementation of the specific action and compliance with the obligations under the Framework Partnership Agreement and the Specific Agreement.



16.2 Ownership of results and rights of use

The results of the specific action (including the reports and other documents relating to it) are owned by the partners.

The partners must give the Agency and the Commission the right to use the results for their communication activities under Article 37.2 EEN FPA.

16.3 Consequences of non-compliance

If a partner breaches any of its obligations under this Article, the grant may be reduced (see Article 42 EEN FPA).

Such a breach may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

SECTION 4 OTHER RIGHTS AND OBLIGATIONS

ARTICLE 17 — CONFIDENTIALITY

17.1 General obligation to maintain confidentiality

During implementation of the action and **for five years after the payment of the balance**, the parties must keep confidential any data, documents or other material (in any form) that is identified as confidential at the time it is disclosed (**‘confidential information’**).

They may use confidential information to implement the Agreement.

The confidentiality obligations no longer apply if:

- (a) the disclosing party agrees to release the other party;
- (b) the information becomes generally and publicly available, without breaching any confidentiality obligation;
- (c) the disclosure of the confidential information is required by EU or national law.

17.2 Consequences of non-compliance

If a partner breaches any of its obligations under this Article, the grant may be reduced (see Article 42 EEN FPA).

Such breaches may also lead to any of the other measures described in Section 5 of the Framework Partnership Agreement.

CHAPTER 5 REJECTION OF COSTS — REDUCTION OF THE GRANT — RECOVERY — PENALTIES — DAMAGES — SUSPENSION — TERMINATION — FORCE MAJEURE



ARTICLE 18 — RECOVERY OF UNDUE AMOUNTS

18.1 Amount to be recovered — Calculation — Procedure

The Agency will — **at the payment of the balance or afterwards** — claim back amount that was paid but is not due under the Agreement.

The coordinator is fully liable for repaying debts of the consortium (under the Agreement) even if it has not been the final recipient of those amounts.

The other partners' financial responsibility in case of recovery is limited, for each partner, to its own debts.

Undue amounts paid by the Agency for costs declared by an affiliated entity/linked third party will be considered as amounts unduly paid to the partner.

18.1.1 Recovery at payment of the balance

If the payment of the balance takes the form of a recovery (see Article 15.4), the Agency will formally notify a '**pre-information letter**' to the coordinator:

- informing it of its intention to recover, the amount due as the balance and the reasons why and
- inviting the coordinator to submit observations within 30 days of receiving notification.

If no observations are submitted or the Agency decides to pursue recovery despite the observations it has received, it will **confirm** the amount to be recovered and formally notify to the beneficiary a **debit note** with the terms and the date for payment (together with the notification of amounts due; see Article 15.5).

If payment is not made by the date specified in the debit note, the Agency or the Commission will **recover** the amount:

- (a) by '**offsetting**' it — without the coordinator's consent — against any amounts owed to the coordinator by the Agency, Commission or another executive agency (from the EU or Euratom budget).

In exceptional circumstances, to safeguard the EU's financial interests, the Agency may offset before the payment date specified in the debit note;

- (b) by ***drawing on the financial guarantee*** (see Article 15.2);

- (c) *not applicable;*

- (d) by **taking legal action** (see Article 56 EEN FPA) or by **adopting an enforceable decision** under Article 79(2) of the Financial Regulation No 966/2012 and Article 299 of the Treaty on the Functioning of the EU (TFEU).

If payment is not made by the date in the debit note, the amount to be recovered (see above) will be increased by **late-payment interest** at the rate set out in Article 15.11, from the day following the



payment date in the debit note, up to and including the date the Agency or the Commission receives full payment of the amount.

Partial payments will be first credited against expenses, charges and late-payment interest and then against the principal.

Bank charges incurred in the recovery process will be borne by the partner, unless Directive 2007/64/EC applies.

18.1.2 Recovery of amounts after payment of the balance

If — after the payment of the balance — the Agency revised the final grant amount for the action (see Article 4.4), due to a rejection of costs or reduction of the grant, and the revised final grant amount is lower than the final grant amount (see Article 4.3), the Agency will:

- if the rejection or reduction does not concern a specific partner (or its linked third parties): claim back the difference from the coordinator (even if it has not been the final recipient of the amount in question)

or

- otherwise: claim back the difference from the partner concerned.

The Agency will formally notify a **pre-information letter** to the coordinator or partner concerned:

- informing it of its intention to recover, the amount to be repaid and the reasons why and
- inviting it to submit observations within 30 days of receiving notification.

If no observations are submitted or the Agency decides to pursue recovery despite the observations it has received, it will **confirm** the amount to be recovered and formally notify to the coordinator or partner concerned a **debit note**. This note will also specify the terms and the date for payment.

If payment is not made by the date specified in the debit note, the Agency or the Commission will **recover** the amount:

- (a) by '**offsetting**' it — without the coordinator's or partner's consent — against any amounts owed to the coordinator or partner by the Agency, Commission or another executive agency (from the EU or Euratom budget).

In exceptional circumstances, to safeguard the EU's financial interests, the Agency may offset before the payment date specified in the debit note;

- (b) *not applicable*;

- (c) by **taking legal action** or by **adopting an enforceable decision** under Article 79(2) of the Financial Regulation No 966/2012 and Article 299 of the Treaty on the Functioning of the EU (TFEU) (see Article 56 EEN FPA).

If payment is not made by the date in the debit note, the amount to be recovered (see above) will be increased by **late-payment interest** at the rate set out in Article 15.11, from the day following the date



for payment in the debit note, up to and including the date the Agency or the Commission receives full payment of the amount.

Partial payments will be first credited against expenses, charges and late-payment interest and then against the principal.

Bank charges incurred in the recovery process will be borne by the partner, unless Directive 2007/64/EC applies.

ARTICLE 19 — EFFECTS OF THE TERMINATION OF THE PARTICIPATION OF ONE OR MORE PARTNERS

19.1 Effects of the termination of the participation of one or more partners, by the partners

The effects of the termination of the participation of one or more partners (by the partners) are as follows:

The partner concerned must submit to the coordinator:

- (i) a technical report and
- (ii) a financial statement covering the period from the end of the last reporting period to the date when termination takes effect.

This information must be included by the coordinator in the final report (see Article 14).

If the request for amendment is rejected by the Agency (because it calls into question the decision awarding the specific grant or breaches the principle of equal treatment of applicants), the Specific Agreement may be terminated according to Article 49.3.1(c) of the Framework Partnership Agreement.

If the request for amendment is accepted by the Agency, the Specific Agreement is amended to introduce the necessary changes (see Article 54 EEN FPA).

Improper termination may lead to a reduction of the specific grant (see Article 42 EEN FPA) or termination of the Specific Agreement (see Article 49 EEN FPA).

After termination, the concerned partner's obligations (in particular Articles 26, 28, 29, Subsection 3 of Section 3 of Chapter 3, 35, 37, 39 EEN FPA) continue to apply.

19.2 Effects of the termination of the participation of one or more partners, by the Agency

The effects of the termination of the participation of one or more partners (by the Agency) are as follows:

The coordinator must — within 60 days from when termination takes effect — submit a request for amendment (see Article 54 EEN FPA), with a proposal for reallocation of the tasks and estimated budget of the partner concerned (see Annexes 1 and 2) and, if necessary, the addition of one or more new partners (see Article 55 EEN FPA). If termination is notified after the period set out in Article 3, no request for amendment must be submitted unless the partner concerned is the coordinator. In this case the request for amendment must propose a new coordinator.



The beneficiary concerned must submit to the coordinator:

- (i) a technical report and
- (ii) a financial statement covering the period from the end of the last reporting period to the date when termination takes effect.

This information must be included by the coordinator in the final report (see Article 14).

If the request for amendment is rejected by the Agency (because it calls into question the decision awarding the grant or breaches the principle of equal treatment of applicants), the Specific Agreement may be terminated according to Article 49.3.1(c) of the Framework Partnership Agreement.

If the request for amendment is accepted by the Agency, the Specific Agreement is amended to introduce the necessary changes (see Article 54 EEN FPA).

After termination, the concerned partner's obligations (in particular Articles 26, 28, 29, Subsection 3 of Section 3 of Chapter 3, 35, 37, 39 EEN FPA) continue to apply.

CHAPTER 6 FINAL PROVISIONS

ARTICLE 20 — ENTRY INTO FORCE OF THE AGREEMENT

The Specific Agreement will enter into force on the day of signature by the Agency or the coordinator, depending on which is later.

SIGNATURES

For the coordinator

For the Agency



EUROPEAN COMMISSION

Executive Agency for Small and Medium-sized Enterprises (EASME)

COSME

ANNEX 1 (part A)

Specific Grant agreement

NUMBER — 671777 — SME2EU

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1.1. The project summary

Project Number ¹	671777	Project Acronym ²	SME2EU
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One form per project

General information

Project title ³	Small and Medium Enterprises To European Union
Starting date ⁴	01/01/2015
Duration in months ⁵	24
Call (part) identifier ⁶	COS-Adhoc-2014-2020
Topic	COSME-2014-2.7 Work Programme of the Enterprise Europe Network
Fixed EC Keywords	
Free keywords	Added-value EEN support services, Internationalization of MSMEs, Business cooperation, Cross bordering partnering, Innovation and Technology.

Abstract ⁷

The SME2EU Consortium, composed of 7 partners, covers a geographical area of three Central Italy Regions: Tuscany, Marche, Umbria. The Partners have worked together since 2008 in an EEN consortium, so they have developed common internal procedures and good practices over three work programmes. The SME2EU Coordinator has a long experience in managing European projects.

The SME2EU Consortium partners are key players in their territories, as Chambers of Commerce, Representative Organisations of SMEs, Regional Agencies for Innovation. This enables them to provide EEN services with their internal expertise or through partnerships with qualified stakeholders, EU network and service providers at local, regional, national, international levels to meet the range of client requirements.

The area covered by the Consortium is characterized by a huge number of micro and small enterprises, in many cases subcontractors of larger companies with a leadership role in the international market thanks to the Made In Italy brand and excellence in Aerospace, Automotive, Chemical, Food/beverage, ICT & robotics, Jewellery, leather/shoes/fashion, Life Sciences Mechanical, Nautical, Textile, Tourism, Wood & furniture, Paper.

These kinds of small firms have two main types of needs: to maintain their excellence and invest in innovation and technology transfer, and also to compete in new markets through internationalization. Most small companies do not have the capacity, skills or resources to be able to properly handle these issues without expert support. Hence the great need in this geographical area to offer highly specialized services, such as those offered by the SME2EU Partners.

The SME2EU Consortium will offer added-value EEN support services in close synergy with the three Regional Authorities and their regional smart specialization strategies. The SME2EU Consortium will implement a communication strategy on the Network to reach all beneficiaries, following the EEN's branding rules.

1.2. List of Beneficiaries

Project Number ¹	671777	Project Acronym ²	SME2EU
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List of Beneficiaries

No	Name	Short name	Country	Project entry month ⁸	Project exit month
1	PROMOFIRENZE AZIENDA SPECIALE DELLACAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI FIRENZE	METROPOLI	Italy	1	24
2	CONFINDUSTRIA TOSCANA	Confindustria Toscana	Italy	1	24
3	EUROSPORTELLLO CONFESERCENTI	Eurosportello Confesercenti	Italy	1	24
4	CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	Italy	1	24
5	ASSOCIAZIONE COMPAGNIA DELLE OPERE DI PESARO	Compagnia delle Opere Pesaro Urbino	Italy	1	24
6	Centro Estero Umbria	CENTROESTERO UMBRIA	Italy	1	24
7	SOCIETA REGIONALE PER LO SVILUPPO ECONOMICO DELL UMBRIA - SVILUPPUMBRIA SPA	SVILUPPUMBRIA SPA	Italy	1	24

1.3. Workplan Tables - Detailed implementation

1.3.1. WT1 List of work packages

WP Number ⁹	WP Title	Lead beneficiary ¹⁰	Person-months ¹¹	Start month ¹²	End month ¹³
WP1	WP 1. Advice, support and information activities	1 - METROPOLI	140.23	1	24
WP2	WP 2. Cross-border partnering activities for business cooperation, technology transfer, innovation and research	7 - SVILUPPUMBRIA SPA	124.27	1	24
WP3	WP 3. SME feedback activities	5 - Compagnia delle Opere Pesaro Urbino	14.83	1	24
WP4	WP 5. Promotion of the Network's services and communication activities	4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	66.87	1	24
WP5	WP 6. Network building and reinforcing the Network	2 - Confindustria Toscana	58.98	1	24
WP6	Project Management	1 - METROPOLI	21.69	1	24
Total			426.87		

1.3.2. WT2 list of deliverables

Deliverable Number ¹⁴	Deliverable Title	WP number ⁹	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D1.1	WP 1 - Progress Report	WP1	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D1.2	WP1 - Final Technical Report	WP1	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24
D2.1	WP2 - Progress Report	WP2	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D2.2	WP2 - Final Technical Report	WP2	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24
D3.1	WP3 - Progress Report	WP3	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D3.2	WP3 - Final Technical Report	WP3	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24
D4.1	WP 5 - Progress Report	WP4	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D4.2	WP5 - Final Technical Report	WP4	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Deliverable Number ¹⁴	Deliverable Title	WP number ⁹	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D5.1	WP6 - Progress Report	WP5	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D5.2	WP6 - Final Technical Report	WP5	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24
D6.1	Project Management - Progress Report	WP6	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D6.2	Project Mangement - Final Technical Report	WP6	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

1.3.3. WT3 Work package descriptions

Work package number ⁹	WP1	Lead beneficiary ¹⁰	1 - METROPOLI
Work package title	WP 1. Advice, support and information activities		
Start month	1	End month	24

Objectives

1.1 Specific objective(s) of the activity

The SME2EU Consortium's specific objective of advice, support and information activities is to increase the competitiveness and innovation capacities of European SMEs.

The capacities of SMEs to compete, innovate and internationalise will be supported through tailored services aiming at the following sub-objectives:

- a. Improving SME knowledge about EU legislation, policies, decision processes, standards in the Single Market, grant & tender opportunities, International, National and regional grants and public procurements, EU programmes and European funding opportunities (with a particular focus on COSME, Horizon 2020, programmes for international cooperation and internationalisation, ESI funds);
- b. Facilitating cross-border innovation and technology transfer activities introducing clients or supporting them in innovation related issues.
- c. Improving SMEs market penetration and identify new business opportunities by providing and stimulating internalisation of measure of market intelligence, identification of markets, comprehension of local business conditions;
- d. Enabling an easier and faster access to financial resources, both from the public environment (grants, pre-seed public measures, etc) and from private one (banks, seed capital, venture capital business angels, crowd funding, crowd investments, etc) through actions aiming at raising awareness of different source of finance ("all money is not the same"), assess/self assess the investment readiness, signposting to business planning programmes/facilities.
- e. Improving the management capacities of SMEs in order to raise business performance and achieve sustainable growth - in particular with a view to withstanding the competitive pressures on the Single Market and on international markets.
- f. Raising awareness and support of intellectual property, enabling SMEs to exploit their IP at the international level.

1.2 Target group/audience

The main targets for SME2EU Consortium's, as described in the Implementation Strategy Chapter 2, are micro and SMEs; inventors, universities, research organisations, clusters, innovation poles, technology clusters, large corporations and other actors in innovation-related industries are seen as other potential direct beneficiaries of the Network's activities.

Priority for highly specialised services will be given to SMEs having high growth potential for innovation and internationalisation and aggregations of SMEs regardless their formal definition, i.e. Clusters, Poles of Innovation, Networks, Districts, etc. In this contest a target of special interest are START-UPS, especially "Innovative START-UPS" that thanks to a new, extremely favorable, legislative framework promise to become soon a strong engine for the economy and employment growth of the country.

Beyond supporting the processes of innovation, industrialisation and re-industrialisation of the traditional Made in Italy companies, which represent the backbone of the economy of the three regions, particular focus will be directed to the sectors identified in the regional Smart Specialisation Strategies:

Toscana: Life Sciences and Neuroscience, Robotics and Biorobotics, Knowledge acceleration systems, Photonics, Silicon Photonics, High Energy Physics, Nanotechnology, Nanomaterials and new materials. Research Areas Across Sectors: Cultural Heritage, Social Innovation, Renewable Energy, Environmental technologies, Research on Climate, Agriculture and Forestry, Space and Aerospace.

Marche: Mechatronics (Robotics, Automation, Smart products, micro-mechanics, biomedical, Advanced product design systems), Sustainable Manufacturing (Advanced Materials, Eco Design in Manufacturing Process, Demanufacturing, Human Centered Manufacturing), Health and Domotics.

Umbria: Agro-food, green chemistry, energy, intelligent manufacturing, life sciences.

Indirect beneficiaries include local, regional, and national authorities and policymakers, trade associations, associations of employers and manufacturers and other stakeholders with a role or interest in supporting economic development,

competitiveness, innovation or innovation management, technology transfer, exploiting research results and IP, and other related areas.

Description of work and role of partners

WP1 - WP 1. Advice, support and information activities [Months: 1-24]

METROPOLI, Confindustria Toscana, Eurosportello Confesercenti, CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO, Compagnia delle Opere Pesaro Urbino, CENTROESTEROUMBRIA, SVILUPPUMBRIA SPA

1.3 Description of work, methodology and tools

The SME2EU Consortium Partners guarantees full coverage of all services to the entire geographic area; if a highly specific assistance cannot be delivered by one regional partner, the assistance will be delivered by another regional or consortium partner. Some services in WP1 will also be provided through and by stakeholders, as indicated in the Implementation Strategy.

In addition to serving existing clients and seeking new ones through events, communications activities, signposting from stakeholders, etc., specific monitoring and recruitment will be maintained to identify promising SMEs to be offered services under Activity 4 – Enhancing SMEs Innovation Management Capacity. Cooperation with regional stakeholders will ensure a further access point to the Network; use of the stakeholder widget is expected to bring new clients.

Besides cooperation with stakeholders will also help avoid overlapping services in the same geographical area and to contribute to assuring a seamless, high quality business support environment for the direct and indirect beneficiaries.

Information will be provided by answering questions submitted by clients directly to the partner's region, by scheduled or drop-in meetings at the partner office, scheduled appointments at the client's facilities, by phone, through email and the HO website, and during events. Questions that cannot be answered internally by the partner will be signposted to other partners or if necessary, to other regional experts and organisations including those who have signed a collaboration agreement with the Consortium.

Questions & Answers and a client database may be recorded by partners according to their own internal procedures and tools.

The tasks planned for WP1 are as follows:

Task 1.1 Information Activities, regarding all EU-related issues that can be relevant to SME:

- EU legislation, policies and standards
- Tender opportunities and public procurement
- EU programmes and structural Funds (R&I, Internationalization, training, energy efficiency,...)
- Access to finance
- IPR issues

Each partner will manage activities in relation to its expertise, and in any case all the topics will be covered in each region. Information activities will mainly be delivered through electronic means, mainly newsletter, e-mails, website and social media.

In some cases, especially for topics related to Funds and Access to finances, partners will try to integrate EU opportunities with National and Regional funds, when suitable, in order to give clients an exhaustive survey of all accessible opportunities to reach their goal (this will be valid also for Task 1.4). Some of these information will be targeted to particular sectors in relation to clients' needs or agreements with stakeholders, in this last case the informative material could be realised also with the support of stakeholders.

Task 1.2 – For some clients, partners will offer the benefit of an AUDIT/REVIEW focused on the client's business, technology or innovation capacity. Business audit/review includes business assessment, evaluation of innovative ideas and projects or management capacities, in view of identifying areas where the company could benefit from advisory, brokerage or other network services. Technology and research/Innovation audits will focus on a company's products, processes, R&I needs or R&I offer, also aimed at offering other specific appropriate network services. These visits will be targeted mainly to SMEs having high growth potential and Innovative start ups.

Visits will be conducted by staff able to investigate and define the companies' internationalisation problems and needs and their potential in terms of products, technologies and innovation expertise. Some background information will be gathered before the visit from the company's web site.

During the visit, supplementary information (such as technical sheets on products, research results and other assets and industrial property, descriptions of innovative processes) will be collected. During visits the partners will present the network service offer to the company, highlighting those most suitable for the company's situation and requirements. Promotional material may be distributed. Partners will use their own internal methodologies and questionnaires, or apply those from the best practices database.

Task 1.3 Advisory & Support Services to Clients regarding EU topics. Partners provide specific answers to client questions, regarding same topics of Task 1.1, and also answer inquiries from Network partners on behalf of their clients (including about Italy-specific topics). These are individual and tailor made advice and support services, including answers to complex questions, requiring more intensive and added-value service. P7 will directly provide tailored advice, research and support services regarding industrial property (identifying assets that can be exploited, performing prior-art searches, providing information about how to apply for a patent and extend it to additional countries, signposting to possible regional or national financial incentives or other support for patenting activities). All other partners will manage these activities through Stakeholders.

Task 1.4 Informative and formative Events. In relation to topics of Task 1.1 for some topics of special interest informative events (conferences, seminars) will be organised to provide a deeper presentation of subjects and an interaction with clients for doubts and enquiries. When suitable and useful some speakers and presentations of these events will be recorded and published online. The organisation of streaming events will also be considered. These events will have a special focus on specific themes on which the EEN provides added-value services like internationalisation and competitiveness, innovation and technology transfer, innovation-related issues ("open innovation", "design-driven innovation", "eco-design", etc.), IPR.

Some more specialised events will have a training structure (workshop), with experts trainers working with the audience. The training events will be targeted mainly to SMEs having high growth potential both regarding innovation or competitiveness and market penetration. Special attention will be devoted to Innovative start ups with topics related to the entire life cycle of the enterprise (start, growth, ripening).

In this Task the collaboration with Stakeholders will be very close, both for organization and promotion of events, to better tune the activities to the clients' needs, especially for realising specific sector events.

Regarding Access to Finance instruments, besides Public Funding opportunities also Banks instruments will be promoted through joint events with Credit Institutes. Crowd-funding will be another important topic.

This task also includes participation as a speaker at events focused on EU related matters or where European topics bring added-value, that are organised by another network partner, as well as those organised by stakeholders (and indirect beneficiaries) at local, regional, national and EU levels.

Task 1.5 Further added-value services. Some partners in addition to the previous services may offer other further Added Value services.

- Study tours especially for young entrepreneurs.
- Support services to manage the B2B and Company mission contact results.
- Others.

Participation per Partner

Partner number and short name	WP1 effort
1 - METROPOLI	37.62
2 - Confindustria Toscana	19.93
CTS	4.22
3 - Eurosportello Confesercenti	31.04
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00
Piceno Promozione	15.33
5 - Compagnia delle Opere Pesaro Urbino	14.21
6 - CENTROESTEROUMBRIA	9.88

Partner number and short name	WP1 effort
7 - SVILUPPUMBRIA SPA	8.00
Total	140.23

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D1.1	WP 1 - Progress Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D1.2	WP1 - Final Technical Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Description of deliverables

1.5 . Deliverables

D1.1 List of Service Types Provided by each partner updated every 6 months.

D1.2 Rolling plan of local/regional events planned/head, updated every 2 months during SME2EU Consortium meetings.

1.6 Outputs, outcomes and impact

a) The outputs and outcomes are linked to the following data items:

Output:

DI.1Regional/local events organised: number of regional/local events organised in partner's own territory or in another Network territory

DI.2Participants in regional/local events: attendees at the events which have been organised by the network partners.

DI.3SMEs/clients receiving individual advisory support: number of clients which have been received the advisory services provided by the network.

Outcomes:

DI.12 Achievements: These are results/objectives attained by an SME or other client, in which its competitiveness and innovative capacities have been improved through services provided in WP1. Examples could be financing obtained, patents applied for, tenders in other countries successfully applied for, etc.

Note that the number of Achievements indicates the combined total for the two activities producing Achievements (WP1 – Advice, support and information activities and WP2 – Cross-border partnering activities for business cooperation, technology transfer, innovation and research).

b) The 2-year targets for outputs and outcomes are as follows:

Indicators P1 P2 P3 P4 P5 P6 P7 SUM

Outputs

DI.1 # of Regional/local events organised 16 23 23 10 6 6 2 SUM 86

DI.2 # of Participants in regional/local events 600 540 550 450 180 450 225 SUM 2995

DI. 3 SMEs/clients receiving individual advisory support 120 150 150 85 57 70 81 SUM 713

Outcomes

DI12 Achievements 9 10 13 8 4 4 8 SUM 56

c) Impact Indicators and their measurement

The positive effects of the Network in the frame of WP1 “Advice, Support and Information” will be assessed against the all 5 impact indicators (market improvement, cost savings, job creation or maintenance, quality improvement, innovation): the impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40). In particular, the SME2EU Consortium will collect the information needed to complete the EASME questionnaires from all clients which have an Achievement (such as successfully developing a new cross-border supply chain, entering a new market, implementing an EU regulation, a new IPR filing, etc.) in the period; partners may optionally collect and submit information for other clients that have received services but have not yet registered an Achievement. Partners may also, when speaking to clients during events, company visits, telephone and email contacts, or through their own client satisfaction questionnaires or other means, collect feedback from them about services received and impacts or benefits from those services.

D1.1 : WP 1 - Progress Report [12]

Progress Report for WP1, as defined by EASME

D1.2 : WP1 - Final Technical Report [24]

Final Technical Report for WP1, as defined by EASME

Schedule of relevant Milestones

Milestone number ¹⁸	Milestone title	Lead beneficiary	Due Date (in months)	Means of verification
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Work package number ⁹	WP2	Lead beneficiary ¹⁰	7 - SVILUPPUMBRIA SPA
Work package title	WP 2. Cross-border partnering activities for business cooperation, technology transfer, innovation and research		
Start month	1	End month	24

Objectives

2.1 Specific objective(s) of the activity

SME2EU Consortium Partners will provide assistance covering the entire partnership process, from the identification of suitable partnering opportunities to appropriate advisory services and assistance for successful entry into the target market(s) or sector(s). Each SME2EU Consortium Partner will work to assist its micro and SMEs and other clients in achieving successful partnering for business and commercial collaboration, innovation and technology transfer, and their participation in R&D activities and in European research programmes provided with professionalism and expertise and respect for the no wrong door principle.

2.2 Target group/audience

The Cross-border partnering activities will be addressed to the target groups mentioned in the Implementation Strategy Chapter 2. Indeed, these activities are of fundamental importance in the three regions of the SME2EU Consortium, where aspects of development relevant to the territory and linked to exporting and innovation processes must be supported and expanded.

Companies in Toscana, Marche and Umbria are increasingly oriented to international markets, they have contributed considerably to Italian export statistics, thanks to the 3Fs of Made in Italy (Food, Fashion, Furniture) and to other specific innovative sectors that maintain quality and excellence of products and processes. In both aspects, networks of companies represent, as already highlighted in the Implementation Strategy, a concrete answer of the territory with more than 900 involved (Toscana is third nationwide for this, with 578 such companies.)

Description of work and role of partners

WP2 - WP 2. Cross-border partnering activities for business cooperation, technology transfer, innovation and research [Months: 1-24]

SVILUPPUMBRIA SPA, METROPOLI, Confindustria Toscana, Eurosportello Confesercenti, CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO, Compagnia delle Opere Pesaro Urbino, CENTROESTEROUMBRIA

2.3 Description of work, methodology and tools

The SME2EU Consortium Partners will offer services for cross-border partnering to the target clients with a high potential for internationalization and/or innovation and/or already involved in such activities. The SME2EU Consortium Partners will also support clients signposted from other service providers or activities, including SMEs and others that have received advisory services described in WP1, beneficiaries of the SME instrument, entrepreneurs who have attended events or learned about the Network through its promotion activities, etc.

New EEN clients will be actively recruited through synergy with Host Organization (HO) taking advantage of its tools and activities (website, seminars on innovation, competitiveness and related subjects, relationships with universities, clusters, stakeholders, etc.). HO staff, whose daily work brings them in contact with SMEs and other potential clients, will be ready to signpost these companies to the SME2EU Consortium staff experts in Cross-border partnering activities who have supported clients in attaining 49 Partnership Agreements in 2011-2013.

The SME2EU Consortium Partners will carry out the Cross-border partnering activities according to the following tasks:

Task 2.1 Brokerage/Matchmaking Events (B2B) and Company Missions (CM)

To encourage participation of local clients in brokerage events and company missions, especially those being held in other EEN Countries, partners will monitor and promote, through 1-to-many means, brokerage events (including through use of POD query alerts) announced on the European EEN web site considering economic sectors relevant for the target clients located in the three Regions. The SME2EU Consortium Partners choosing B2B/CM events to be

promoted will also consider any feedback or information made available by EASME about success rates of different events. Some SME2EU Consortium Partners will be involved in co-organising B2B/CM.

In addition to promoting and participating in B2B/CM organised in territories outside the Consortium's area, some SME2EU Consortium Partners will also organise partnering events in their own territories such as "Matching event" organized by P5, and "Meet in Italy for Life Sciences", the first B2B entirely focused on Life Sciences hold in Italy (the first edition in 2014) organised by P2 with the co-organisation of other Italian and international Network Partners. It will become a permanent yearly Network event, to be held in different Italian regions, co-organised by many EEN partners in different regions and abroad, and involving all major national stakeholders as well as others from beyond Italy. The 2015 edition will be in Milan, the 2016 in Rome.

A brokerage event will be organised in the context of EXPO 2015 and it will promoted by all Italian EEN partners and co-organised by some of them. The EXPO itself will run from 1 May to 31 October 2015 and the Italian EEN consortia will agree on the timing, sectors, and other details of the related brokerage event.

For all B2B/CM in which it has client(s) participating, a SME2EU Consortium Partners will support clients in registering for events and inserting their company and cooperation profiles, in selecting partners and requesting appointments, and for some events, during their meetings. SME2EU Consortium Partners present at events will, to the extent possible, support the clients of absent consortium partners.

In order to multiply the advantages of membership, the consortium partners who belong to Sector Groups will proactively inform the others about upcoming important B2B/CM and other partnering initiatives. Similarly, SME2EU Consortium Partners organising or co-organising B2B/CM will inform the entire consortium about them, and all such events will receive particular promotion: SME2EU Consortium clients will be informed about those events, and of the added benefit of a consortium partner available to provide any needed personalised support for validation of profiles and, where appropriate, during the event itself.

These events co-organised by a consortium member, as well as other cross border partnering events, will be promoted on the SME2EU website. Partners will also use their internal tools and methods (newsletters, websites, personal contacts, etc.) to publicise selected B2B/CM.

A best practice experimented for the B2B Meet in Italy for Life Sciences that SME2EU consortium will promote and propose also in different occasions and types of events was the option for clients where to present themselves and their needs through elevator pitches. The pitches were recorded and published on a dedicated YouTube channel, leveraging the benefit with an additional, lasting and wide visibility to clients and to promote the event.

To support its clients in adopting resource efficiency measures, SME2EU Partners will pay extra attention to promoting B2B/CM that involve resource efficiency techniques, solutions and technologies (advice on waste minimization, energy saving and energy efficiency, recycling and using recycled materials, opportunities for industrial symbiosis and new business models, green products and services).

In addition, the following specific sectors are expected to receive particular focus from the following partners: Tourism (P1, P3) Agro-food (P1, P3, P4, P5, P6), Fashion-Textiles-Leather (P1, P2, P6), Energy efficiency/renewable sources (P3, P4, P6, P7), Environment (P3, P4, P7), Life sciences (P2, P7), ICT (P3), Cultural Heritage (P1,P3), Construction (P1, P5), Nautical (P2, P6), Mechanics (P2, P3, P5, P6), Furnishing (P1, P5, P6).

Task 2.2. Creation of 3 Type of Partnering Profiles:

The types of partnering profiles are:

2.2.1 Business Offers and Requests

2.2.2 Technology Offers and Requests

Each SME2EU Consortium Partner will use its internal processes and expertise to assist clients in identifying their commercial and technology and assets (expertise, products, patents, other tangibles or intangibles), which can be published as business and technology offers in defining any needs for which they can seek solutions from cross-border partners through business and technology requests.

SME2EU Consortium Partners will prepare, insert and internally review the profiles based on information collected from clients.

Based on knowledge of its own client base and more generally its territory, SME2EU Consortium Partners will select profiles from the Partnering Opportunities Database (POD) for dissemination by targeted emails, newsletters, websites, tweets, blogs and other one-to-many methods, as well as offering customised searches for a one-to-one service.

SME2EU Consortium Partners will install the POD widget (or another tool with similar function if made available by EASME) on their HO websites and/or section devoted to Network activities, to allow their clients and other website visitors to search the partnering profile database.

2.2.3 Research

SME2EU Consortium Clients will be supported in facilitating the access to research co-financing opportunities, offering them the Partner search Service for joining Research projects, whether as RDRs or partner searches posted using network internal communications such as the Merlin Forums, will be selected and sent to targeted clients. Those clients without previous experience in co-financed projects, but interested and ready to participate, will receive advice and guidance in how to proceed (including under WP1 services). Those with more experience or readiness, or having a project idea they wish to develop, will receive support for finding an appropriate call and, through publication of RDRs, locating qualified cross-border partners to complete their research consortium. Calls and partner searches relative to energy and resource efficiency (for example, financial incentives for resource efficiency and green products or services, etc.) will receive targeted promotion.

Task 2.3 Publication and diffusion of Partnering Profiles:

The above mentioned types of partnering profiles will receive publication and diffusion:

Publication: the service of publishing profiles from the SME2EU Consortium's territory will be offered mainly to more "structured" clients, that is, those with the outlook and resources (including organisational and linguistic) to carry out international cooperation/ business relationships.

Diffusion: each SME2EU Partners will inform its clients about profiles from the EEN using its own internal methods and tools, as further described in WP5. Profiles will be selected on the basis of priorities already noted above, as well as according to any specific client needs and priorities that may be determined.

Because many profile abstracts are translated into Italian to facilitate their publication in newsletters, HO websites and in emails, the SME2EU Consortium will share translations made by one partner to all the others. The sharing will work as follows: when a partner selects a profile for translation, it will first check to see if a translation already exists on the SME2EU website, and if so, use that. If no translation is found, the partner will make its own translation and post it to the website so that the others may use it. This "wiki" approach offers two distinct advantages: it allows all to benefit from a shared workload, without any burdensome procedures to manage the profile selection and division of work; and it will also assure that the SME2EU Consortium website is frequently updated with fresh content.

SME2EU Consortium Partners will encourage and support appropriate clients in registering to receive query alerts from the POD, since this is a method with demonstrated efficiency and effectiveness to allow clients to set their own search criteria and change them as often as needed, in order to find profiles that respond to their evolving requirements.

SME2EU Consortium Partners will share with clusters, innovation poles and other suitable stakeholders all the targeted updated opportunities and cooperation profiles thorough specific and tailor-made e-mails, newsletter or other. Using the stakeholder widget, or other EASME tool, they could publish them on their portals. This is a powerful and essentially no-cost way to promote the Network, perhaps recruit new clients, provide self-updating value-added content to stakeholders, and potentially increases outgoing EoIs, partnering and achievements.

Task 2.4 Expressions of Interest (EoIs) Management

EoIs for the three types of profiles will be managed as follows:

EoIs received for its clients' profiles will be monitored, and SME2EU Consortium Partners will act to ensure that their clients reply to all EoIs they receive, promptly and professionally; Network Partners will be kept informed of any developments. Similarly, for EoIs made by its clients for a foreign profile, SME2EU Consortium Partners will track the status of contacts and their own clients' responsiveness, and update (and if needed, solicit help from) their Network colleagues.

Task 2.5 Follow up of Cross Border Partnering Activities

SME2EU Consortium Partners will monitor:

- the B2B/CM or other activities
- the status of EoIs from and toward its clients, regardless of the origin of the contact in order to ensure that its own clients, other Network partners and their clients receive information and status updates

to detect the conclusion of transnational Partnership Agreement.

The principles of responsiveness, responsibility and professionalism set forth in the Code of Conduct will be followed. Network partners will be kept informed of any developments and asked to intervene when needed.

Participation per Partner

Partner number and short name	WP2 effort
1 - METROPOLI	25.54
2 - Confindustria Toscana	12.53
CTS	3.56
3 - Eurosportello Confesercenti	38.56
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00
Piceno Promozione	16.41
5 - Compagnia delle Opere Pesaro Urbino	8.89
6 - CENTROESTEROUMBRIA	6.18
7 - SVILUPPUMBRIA SPA	12.60
Total	124.27

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D2.1	WP2 - Progress Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D2.2	WP2 - Final Technical Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Description of deliverables

2.5. Deliverables

D 2.1: Rolling plan (list) of brokerage events and company missions updated every 2 months, organised, co-organised and/or promoted by Partners through all means employed: 12 lists updated 6 times a year during SME2EU Consortium meetings.

D 2.2: List of profiles disseminated by the SME2EU Consortium Partners to their clients, through all means employed: 2 year lists in the project period for Partner.

2.6 Outputs, outcomes and impact

Output: Brokerage events/company missions: number of B2B/CM organised or co-organised, in partner's own territory or in another Network territory;

Output: SMEs/clients in brokerage events/company missions: number of partner's own clients with profiles published in online brokerage event catalogues, or hosting foreign companies for a mission, or travelling to a foreign company mission

Output: Meetings at brokerage events/company missions: number of meetings partner's clients have had with foreign partners participating in a B2B/CM

Output: Partnership profiles produced: number of technology offers (TO), technology requests (TR), business offers (BO), business requests (BR) and cooperative research partner searches (RDR), for the partner's own clients, inserted into the network POD, validated and published

Output: Expressions of interest received: number of expressions of interest received from foreign network partners or companies, for POD profiles or partner searches sent to through internal communications portals (for example on Merlin forum I Am Looking For), published on behalf of partner's own clients

Output: Expressions of interest made: number of expressions of interest from partner's own clients, made to foreign profiles published on the POD or partner searches sent through internal communications portals (for example on Merlin forum I Am Looking For)

Outcome: Achievements: number of partnership agreements (commercial, technology or research agreements) resulting from partnership proposals/profiles produced and disseminated in the Network, or from brokerage events and company missions involving the Network.

Note that the number of Achievements indicates the total of the indicative breakdown for the two activities producing Achievements: ASOs for WP1 (Advice, support and information activities) and PAs for WP2 (Cross-border partnering activities for business cooperation, technology transfer, innovation and research).

b) The proposed 2-year targets for outputs and outcomes are: please see file PRT B uploaded in PDF format.

c) The impacts expected and their measurement are as follows:

Impacts: Clients receiving services may experience tangible and intangible improvements to their business, in areas such as market improvement, cost savings, job creation or maintenance, quality improvement and innovation/competitiveness.

Measurement: Partners with clients having Achievements in the period will be required to complete the two qualitative questionnaires prepared by EASME for this purpose. The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

D2.1 : WP2 - Progress Report [12]

Progress Report for WP2, as defined by EASME

D2.2 : WP2 - Final Technical Report [24]

Final Technical Report for WP2, as defined by EASME

Schedule of relevant Milestones

Milestone number ¹⁸	Milestone title	Lead beneficiary	Due Date (in months)	Means of verification
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Work package number ⁹	WP3	Lead beneficiary ¹⁰	5 - Compagnia delle Opere Pesaro Urbino
Work package title	WP 3. SME feedback activities		
Start month	1	End month	24

Objectives

3.1 Specific objective(s) of the activity

The SME2EU Partners will gather feedback from enterprises, in particular SMEs, on EU legislation, programs or other EU topics on consultation on selected EU policies, actions and legislation, launched by the European Commission according to its specific priorities; regarding difficulties that companies encounter working in the Single Market (SME Feedback Mechanism Database provided by the EU Commission) in order to:

- stimulate their participation in SME business consultation and collect and encode in the IPM database quality SME feedback cases and, if applicable, to signpost them to the national SOLVIT point
- promote the results of changes/improvements of EU policies to SMEs and stakeholders with a particular attention to sector-specific organisation at regional and local levels, as soon as these results are made available by the EU Commission after the analysis managed by the EC DGs concerned. These can be also promoted with the involvement of the national Enterprise Europe Network press officer.
- complement the role of stakeholders in the SME2EU area.

SME2EU Partners will involve clients according to the Consortium communication Strategy and to their own communication channels (web site, newsletter, mailings, article, press releases, and phone calls).

The Partner P5 will assume the role of “SME Feedback Contact Person” within SME2EU.

3.2 Target group/audience

Direct beneficiaries

- Micro and SMEs
- Large Companies
- Potential new entrepreneurs

Indirect Beneficiaries

- Cluster and Cluster organisations
- Technological Poles, Incubators
- Policy Makers
- Public companies
- Public Authorities
- Business associations

Partners P1, P2, P3, P4, P5, and P6 will contact, inform, invite and consult the most representative target group(s) concerned based on the topic of the consultation launched by European Commission, involving the sectorial organisation if needed.

Description of work and role of partners

WP3 - WP 3. SME feedback activities [Months: 1-24]

Compagnia delle Opere Pesaro Urbino, METROPOLI, Confindustria Toscana, Eurosportello Confesercenti, CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO, CENTROESTEROMBRIA

3.3 Description of work, methodology and tools

SME2EU partners will implement the Activities taking into consideration the indications and tools developed and provided by the European Commission and EASME.

P5 is the “SME Feedback Contact Person” for the SME2EU. P5 will be initially assisted by P1 Staff with experience as WG SME Feedback and Coordinator of National Specific Action on SME panel.

P5 SME Feedback Contact Person will implement the following tasks:

Task 3.1 Intermediate with the European Commission and EASME and in liaison with other SME feedback Activities
Contact person nominated in the other Italian Consortia.

Task 3.2 EU Documentation processing in order to provide support to other EEN colleagues within SME2EU (methodological and technical) such as:

- Collecting and translating the materials provided by the EC to be delivered to SMEs, (backgrounds, questionnaires,...) into Italian, acting in concert with other Italian SME feedback contact points;
- Providing necessary template for the promotion and for registering the ID number, provided by the EU platform after having encoded SME opinions.

SME2EU Partners will implement the following tasks:

Task 3.3 SME feedback campaigns

- Identifying and selecting relevant SMEs for the consultation topic according to the indications to be provided by EU Commission on each single SME consultation;
- Inviting and consulting companies, organizing activities aimed at involving mainly SMEs such as meetings, events, e-mail, phone interviews for understanding the consultation and encouraging target group to respond;
- Collecting opinions of clients participating in the SME consultation and/or difficulties resulting from EU legislation or policies experienced by companies in the Single Market;
- Submitting data collected to SME Feedback Database and/or redirect it to SOLVIT;
- Disseminating results about improvements and changes to EU policies after the analysis managed by the European Commission to SMEs and, when applicable, sector-specific organizations and other stakeholders as soon as these results will be available according to its own communication channels.

Participation per Partner

Partner number and short name	WP3 effort
1 - METROPOLI	4.25
2 - Confindustria Toscana	1.27
CTS	0.60
3 - Eurosportello Confesercenti	4.06
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00
Piceno Promozione	1.65
5 - Compagnia delle Opere Pesaro Urbino	1.76
6 - CENTROESTEROMBRIA	1.24
Total	14.83

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D3.1	WP3 - Progress Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the	12

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
				Commission Services)	
D3.2	WP3 - Final Technical Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Description of deliverables

3.5. Deliverables

D3.1 Rolling plan of Consultations launched by the European Commission and to be promoted by SME2EU Partners, updated every 2 months in the regular Senior Council meetings.

3.6 Outputs, outcomes and impact

The proposed 2-year targets for outputs are: please see file PART B uploaded in PDF format.

Outcomes: Not applicable according to the definition provided by the Guide for Applicants

Impact:

Quality Improvement: SME2EU Partners contribute to improving the business environment in which SMEs operate, providing them with the revised EU politics/legislation/initiatives implemented by the EC based the feedback collected through SME feedback activities.

The SME2EU Partners will disseminate, as achievements for SME feedback activities, the results on EU policy improvements and changes to SMEs and stakeholders as soon as these results will be available after the analysis by the EC DG concerned.

The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

D3.1 : WP3 - Progress Report [12]

Progress Report for WP3, as defined by EASME

D3.2 : WP3 - Final Technical Report [24]

Final Technical Report for WP3, as defined by EASME

Schedule of relevant Milestones

Milestone number ¹⁸	Milestone title	Lead beneficiary	Due Date (in months)	Means of verification
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Work package number ⁹	WP4	Lead beneficiary ¹⁰	4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO
Work package title	WP 5. Promotion of the Network's services and communication activities		
Start month	1	End month	24

Objectives

5.1 Specific objective(s) of the activity

SME2EU Consortium will promote EEN services with the following objectives:

- to increase the visibility of the EEN as provider of high quality advisory services to support SME competitiveness and innovation, in the three regions involved, to attract and support new or potential new clients
- to spread awareness of the SME2EU Consortium identity and mission, clearly identifying activities and services provided by each partner organisation to clients, highlighting the Partners and their role in the SME2EU Consortium area

Particular attention will be devoted to provide customized information to all target groups.

5.2 Target group/audience

According to the Implementation Strategy Chapter 2, the SME2EU Consortium targets for communication activities are:

– Communication to companies: Direct beneficiaries

All companies, mainly SMEs, existing, new and potential clients

– Communication to and through Stakeholders: Indirect Beneficiaries

Public Authorities; Research Institutes, Public and private providers of support services to SMEs, Sectorial Business Association, other EU networks and all relevant stakeholders.

It is important to note that stakeholders can be considered direct beneficiaries when they directly use EEN information/ advisory services and indirect when they operate as intermediaries (of the Network) to reach target SMEs.

Description of work and role of partners

WP4 - WP 5. Promotion of the Network's services and communication activities [Months: 1-24]
CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO,
METROPOLI, Confindustria Toscana, Eurosportello Confesercenti, Compagnia delle Opere Pesaro Urbino,
CENTROESTEROUNMBRIA, SVILUPPUMBRIA SPA
 5.3 Description of work, methodology and tools

All SME2EU Consortium Partners already have their own communication tools to reach their target groups. Their participation in the EEN has given them the opportunity to enhance these tools, so they can provide more complete and customized information to businesses and so be more effective.

This WP will be involve the following tasks:

Task 5.1 – Management of SME2EU Consortium, Partner and National web sites

The SME2EU Consortium will develop and implement a web site that represents the main common tool to communicate with the audience. The web site graphic design will be consistent with the EEN's branding rules, guidelines and identity. It is structured as a promotional and information tool thus enhancing the visibility of the EEN in the Consortium area and beyond, providing users with updated and reliable information about European Union topics and EEN services and activities. The web site will share events, initiatives, newsletters, success stories and good practices of the Partners. Clients visiting it will find a link to the Partnering Opportunities Database where they can search for business, technology and research profiles of their interest.

POD profile abstracts translated into Italian by the partners for their own use will also be posted on the Consortium web site, as further described in WP2.

The web site will show links to the most relevant EU portals, to the EEN national web site, to each SME2EU Consortium Partner's web site and to their customized business pages of the social networks, and to the innovation and creativity blog hosted by P7 but which also publishes articles by users: <http://lasoluzioneinnovativachenonho.com/>

The web site platform will be adapted to new technologies that may evolve during the six years of the project. P4 will manage the SME2EU Consortium web site and will handle common e-mail address, monitoring enquires daily and forwarding them to the most appropriate SME2EU Consortium Partner.

In addition to the common web site, each Partner will be responsible for maintaining at least one web page on EEN activities and services of their own HO web sites, ensuring compliance with EEN's branding rules and guidelines, clearly identifying the EEN and SME2EU Consortium name, logo and services.

Analysis of the statistical reports will allow monitoring of users' interest on the site's contents based on data about visits, subscribers and downloaded articles.

An EASME feedback questionnaire will be sent to the targets yearly to monitor client satisfaction.

Moreover each SME2EU Consortium Partner will contribute to the updating of the EEN National web site by providing articles, newsletters, info and documentation about their own initiatives, events, activities and success stories.

As described in Chapter 6 of the Implementation Strategy, a common national EEN Press Expert will be responsible for the National Communication strategy on different media tools, including the National website.

Task 5.2. - Social media management

In order to quickly and effectively communicate activities, services and initiatives, the SME2EU Consortium Partners will make use of social media which represent a flexible and adaptable promotion channel, allowing them to reach both a wide audience and specific target groups. The SME2EU Consortium Partners will communicate EU contents through social networks (Facebook, Linked-in, Twitter, Google+, YouTube, etc.) and will use them to deliver EEN services too.

According to specific EEN services (WP.1), the SME2EU Consortium Partners will identify specific profiles thus building business communities where EEN clients can take part, dialogue and share experiences, success stories, and contents. Each Partner is committed to widely promote the links to social networks, fora, communities and/or Apps in order to build closer relationships with clients.

Such channels can be used to spread information on European, national and local promotional campaigns in which SME2EU Consortium and/or Partner organisations participate.

SME2EU Consortium Partners will regularly monitor effectiveness of social media activities to collect data on social network penetration (Facebook fans, Twitter followers, LinkedIn links, Google+ members, YouTube views etc.).

Web marketing tools (SEM, SEO, SMM, SMO, DEM ..) may be exploited too, according to each Partner' strategies: in particular Search Engine Optimisation (SEO) may allow SME2EU website to be visible and to achieve an higher ranking in search engine results pages. Search Engine Marketing (SEM) and Social Media Optimization (SMO) may be exploited by each Consortium partner to promote EEN special events/promotional campaigns and/or to match specific target audience. On the other hand, Direct E-mail marketing (DEM) may be used by SME2EU partners to reach potential or current clients, to enhance relationship and to build loyalty, trust and EEN brand awareness.

Task 5.3 – Newsletters, targeted mailings, business/tender alerts and brochures

SME2EU Consortium Partners will contribute to promoting the Network brand and its services, through own newsletters which will be available in the SME2EU Consortium and Partners web sites. Partners' Newsletters will be sent by e-mail to their own client database or to a specific audience according to the contents.

The SME2EU Consortium Partners will make use of targeted mailings and business/tender alerts according to the audience to be reached.

The SME2EU Consortium Partners will produce the SME2EU Consortium leaflet and other specific promotional brochures available on line and in paper format illustrating the EEN services and local contact points.

An EASME feedback questionnaire will be yearly sent to the targets to monitor clients' satisfaction.

Task 5.4 – Success Stories promoted

The success stories represent a useful way to promote the Network by providing concrete examples of how the Network assists small and medium-sized enterprises in their processes of internationalization and innovation (see the process of selection and follow up in the IS Chapter 6).

Task 5.5 – Cooperation with local and regional stakeholders

The cooperation will be handled according to Chapter 7 of the Implementation Strategy and to the Communication Objectives described in WP5.1.

Stakeholders include all relevant actors which can contribute, as intermediaries, to increase network activities/services impact in the SME2EU Consortium area. The SME2EU Consortium will manage the Communication with Stakeholders through personal relationships, meetings, round tables, direct mailings, conference calls, cloud applications.

Stakeholder involvement enhances visibility of the network at local/regional level and it allows improvement of the access and proximity of the integrated services provided to SMEs.

This cooperation may be implemented through informal or formalized cooperation agreements aimed at ensuring a dialogue, seeking complementarities, avoiding overlaps, exchanging information, best practices and success stories, extending the number of access points in the territory ensuring mutual signposting and assistance in promotional activities and in joint initiatives and events management. Involvement of intermediaries may be useful to spread clients' cooperation profiles at a wider level through stakeholders' web sites through use of the Pod stakeholder widget for commercial, research and technology profiles.

Cooperation with Stakeholders will be monitored by the Partners through EEN client satisfaction questionnaires.

Participation per Partner

Partner number and short name	WP4 effort
1 - METROPOLI	9.98
2 - Confindustria Toscana	10.38
3 - Eurosportello Confesercenti	19.92
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00
Piceno Promozione	10.94
5 - Compagnia delle Opere Pesaro Urbino	5.29
6 - CENTROESTEROMBRIA	3.72
7 - SVILUPPUMBRIA SPA	6.64
Total	66.87

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D4.1	WP 5 - Progress Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D4.2	WP5 - Final Technical Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Description of deliverables

5.5 Deliverables

The following deliverables will be produced:

D5.1 SME2EU Consortium web site publication. Within 3 months from the beginning of the project.

D5.2 EEN website section of Consortium partners publication. Within 3 months from the beginning of the project.

D5.3 Social media Implementation report. Containing social media plan and implementation report. First published on month 3 and updated on month 12 and 24.

D5.4 List of newsletters edited and typologies of targeted mailing or business alert sent, updated twice a year.

D5.5 List of services/activities shared with stakeholders divided for typologies (Advices, Cross Border Partnering and Feedback), updated twice a year.

D5.6 List of Success stories of the Consortium, updated twice a year.

5.6 Outputs, outcomes and impact

The proposed 2-year targets for outputs are:

DI 13 total sum is 75600. In particular: please see file PART B uploaded PDF format.

Impact: SME2EU Consortium Partners will regularly collect, monitor, measure and report in IMT evidence and data on network services promotion and communication activities.

The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

Measurement: statistical analysis on websites and social media users, mailings sent, newsletters and alerts subscribers may give a realistic picture of SME2EU Consortium services awareness among the community. The measurements of the 5 impact indicators will also be realized through the analysis of the qualitative EASME questionnaire.

D4.1 : WP 5 - Progress Report [12]

Progress Report for WP5, as defined by EASME

D4.2 : WP5 - Final Technical Report [24]

Final Technical Report for WP5, as defined by EASME

Schedule of relevant Milestones

Milestone number ¹⁸	Milestone title	Lead beneficiary	Due Date (in months)	Means of verification
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Work package number ⁹	WP5	Lead beneficiary ¹⁰	2 - Confindustria Toscana
Work package title	WP 6. Network building and reinforcing the Network		
Start month	1	End month	24

Objectives

6.1 Specific objective(s) of the activity

The activity of Network building and reinforcing the Network aims at ensuring a proactive interaction among EEN Partners in order to increase the quality and success of the Network as a whole. This objective will be made possible with an adequate participation of SME2EU Consortium staff to the EEN initiatives at national and international levels.

SME2EU Consortium's specific objectives will be:

- Support for the organisation and participation to national EEN meetings, to which each Partner participates with at least one staff member;
 - Participation in Annual Conferences of the EEN;
 - Participation in staff exchanges or receiving mentoring within the dedicated mentoring scheme;
 - Participation in meetings of EEN Working Groups or Steering Groups;
 - Participation in Sector Group meetings and activities;
 - Exchange and use of good practices, knowledge and/or tools; contributing own expertise for strengthening the Network as a whole;
 - Maintain constant links with other Network Partners and extend mutual know-how;
 - Join regional, multi-regional, national and transnational activities of Network Partners (B2B, info days, workshops, etc.);
 - Participation in Network training activities;
- Monitoring Network results.

6.2 Target group/audience

SME2EU Consortium's target groups are:

- EEN Partners at European, national and SME2EU Consortium level
- European Commission and EASME

All direct and indirect beneficiaries of standard Network activities (see IS Chapter 2).

Description of work and role of partners

WP5 - WP 6. Network building and reinforcing the Network [Months: 1-24]

Confindustria Toscana, METROPOLI, Eurosportello Confesercenti, CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO, Compagnia delle Opere Pesaro Urbino, CENTROESTEROUMBRIA, SVILUPPUMBRIA SPA

6.3 Description of work, methodology and tools

All SME2EU Consortium Partners will actively participate in relevant EEN activities and will strengthen collaborations with other Network Partners, assuring adequate allocation of resources for their participation.

To implement and foster collaboration with Network Partners, the following tasks will be implemented:

Task 6.1 Participation in Network meetings

- The EEN Annual Conference will be attended by all SME2EU Consortium Partners in order to meet other network members, to exchange best practices and experiences, and to plan possible joint activities for target beneficiaries;
- Each SME2EU Consortium Partner will participate at the EEN national meetings, and contribute to their organization;
- Each SME2EU Consortium Partner will participate in Consortium Meetings every two months, to be held physically and/or through electronic means.

Task 6.2 Participation in Network Groups

The SME2EU Consortium will participate in National Working Groups that will be created by the Italian EEN on relevant topics such as Communications, in which P1 and P4 will participate.

As the Coordinator, P1, will participate in the National Steering Group activities. One national representative will be selected, among all Italian Consortia, for the European Steering Group.

Some SME2EU Consortium Partners will participate in the following Thematic Sector Groups: P1 Agrofood, P3 Services/Retail and Tourism/Cultural Heritage, P7 Environment.

Task 6.3 Maintain constant links with other Network Partners and extend mutual know-how / Answer Network enquires
To strengthen the link and collaboration with other Network Partners SME2EU Consortium will promote the diffusion of its expertise and initiatives towards other National consortia or international Partners, through direct e-mail, Merlin forums (Country and Sector) and social networks.

All SME2EU Consortium Partners will be involved in producing and sharing Good Practices internally and at national and European level in order to facilitate their adoption.

The SME2EU Consortium will ensure that replies are sent to the enquiries from Network Partners (through Merlin Forum or directly received) looking for information on behalf of their clients.

Task 6.4 Joint regional, multi-regional, national and transnational activities with Networks Partners

In order to better exploit the opportunities and competences of the network, some SME2EU Consortium Partners will jointly carry out activities with other Network Partners, both Italian and international.

These activities will include co-organisation of information days, Brokerage Events, Company Missions (see WP1 and WP2), and participation in events as speaker, trainer, chairman, expert, or other.

Task 6.5 Participation in Network training/staff exchange/mentoring activities

To ensure and maintain high quality service levels, all SME2EU Partners will participate in the EASME training programme, including on-site (classroom) and on-line (e-learning) centralized and decentralized training events and/or SME2EU Consortium Training.

Particular attention will be paid to the training of any new staff that may join the project.

P2 will also take part in staff exchange programmes and mentoring schemes.

Task 6.6 Substantial contributions to the operation and quality of the Network

Some SME2EU Consortium Partners, during the life cycle of SME2EU Project, could take on a more demanding role relative to activities such as Chairing Sector Groups and/or working groups, Provision of (advanced) trainings.

SME2EU Consortium Partners will participate in EU-driven additional activities launched by the European Commission or EASME to:

Adjust the EEN's existing services to changing political priorities at EU level

Add new services to the mix of EEN activities to respond to changing political priorities at EU level

Carry out larger scale activities in cooperation with other EU programmes not specified in this call.

Participation per Partner

Partner number and short name	WP5 effort
1 - METROPOLI	15.58
2 - Confindustria Toscana	8.72
CTS	1.24
3 - Eurosportello Confesercenti	15.29
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00
Piceno Promozione	7.66
5 - Compagnia delle Opere Pesaro Urbino	3.57
6 - CENTROESTEROMBRIA	2.48
7 - SVILUPPUMBRIA SPA	4.44

Partner number and short name	WP5 effort
Total	58.98

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D5.1	WP6 - Progress Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D5.2	WP6 - Final Technical Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Description of deliverables

6.5. Deliverables

D 6.1 Rolling plan (list) of Network meetings (Annual, National and Consortium) including details of participating Consortium staff, updated twice a year.

D 6.2 List of Groups participated in (Working groups, Steering Group and Sector group), events to be attended, including meetings and other activities, together with participating Consortium staff, updated 6 times a year during SME2EU Consortium meetings.

D 6.3 List of regional, multi-regional, national and transnational activities co-organised within SME2EU Consortium and intra-consortia EEN partners, updated 6 times a year during SME2EU Consortium meetings.

D 6.4 List of Network training activities with involved staff updated twice a year.

The 4 deliverables will be grouped in the SME2EU Consortium Networking Plan. At the beginning of the project the types and numbers of expected activities together with the minimum target will be detailed and included as Initial Networking plan.

During the project implementation phase individual deviations will be analysed, remarked and discussed, to ensure the achievement of the project objectives.

6.6 Outputs, outcomes and impact

DI15 Answered enquiries from Network Partners. Summing the number of answers to questions posted on Merlin Forums and direct enquiries sent by Network Partners through other means.

DI16 Active contributions to Network activities include

Active contributions to Network activities (1 Annual Conference, 2 National meetings/year; 2 National Steering Advisory Group and 2 WG meetings, Sector Groups Meetings

Active contributions to Consortia activities (6 SME2EU Consortium meetings/year plus 1 Training)

Contributions to good practices

The proposed 2-year targets for these outputs are: please see file PART B uploaded PDF format.

Impact: the correct implementation of this WP's activities is fundamental to optimize the opportunities offered to direct and indirect Clients of the whole EEN network. Actively participating in meetings and training activities will facilitate the diffusion of correct, timely and effective information. Sharing of strategies, good practices and expertise

will lead to a more widespread and useful interaction of network partners with businesses and other types of clients. Co-organizing events will boost their effectiveness and participation.

This WP will therefore have an indirect impact on all 5 indicators that the network aims at achieving: market improvement, cost savings, job creation or maintenance, quality improvement and innovation / competitiveness. The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

Measurement: measuring the 5 impact indicators will be made through the EASME qualitative questionnaire or the questionnaires collected relative to events as better described in WP2.

D5.1 : WP6 - Progress Report [12]

Progress Report for WP6, as defined by EASME

D5.2 : WP6 - Final Technical Report [24]

Final Technical Report for WP6, as defined by EASME

Schedule of relevant Milestones

Milestone number ¹⁸	Milestone title	Lead beneficiary	Due Date (in months)	Means of verification
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Work package number ⁹	WP6	Lead beneficiary ¹⁰	1 - METROPOLI
Work package title	Project Management		
Start month	1	End month	24

Objectives

1. Governance body and project management organisation chart

The SME2EU Consortium Management will have a very light structure to coordinate the seven Partners involved in the proposal (see IS Chapter 5).

In particular the governance body “Senior Council” (SC) will be constituted by P1 with the Contact Coordinator for the Project and 1 Senior staff for Project Management, and by 1 Senior staff acting as Program Manager Officer (PMO) for each Partner (in case the responsibility of activities is divided between more persons beside the PMO, if requested, other senior staff per partner will be admitted to join the SC meetings, in any case without vote right). Each PMO will be responsible of its HO leading WP: acting also as WP Leader: P2 WP6 Leader, P3 WP4 Leader, P4 WP5 Leader, P5 WP3 Leader, P6 WP 1 Leader, P7 WP 2 Leader.

Each PMO WP Leader will coordinate and prepare a concrete plan of objectives and activities to be implemented by each Partners involved, with deliverables, outputs, outcomes, impact, human resources and costs. Each WP Leader will coordinate the Partners to implement the WP.

Each Partners will define an internal plan to implement each WP. Each SME2EU Consortium Partners will manage the project at Host Organization (HO) level together with its internal Manager. All the HO internal Manager will be involved and updated by its Senior staff for Project Management in all phases of the Project life cycle and in particular before the 6 meetings to address the SC strategies and/or priorities to be followed according to local and/or regional policies agreed with Regional Authorities or Stakeholders.

The SC will meet via web conference every two months for 6 minimum number of Consortium meetings every year in order to discuss the common strategy and actions for implementing the project, monitoring the working in progress of each WP through analysis and reporting made by the WP Leader that coordinate the other partners to implement the WP. The P1 Coordinator will produce a synthetic report at the end of every meeting to sum up important issues discussed and decisions assumed.

SME2EU Consortium will produce, at the end of every year, a summary yearly activity report addressed to the HO internal Managers containing the EEN activities and the goals reached.

The communication between Partners will be managed mainly through e-mail and through Intranet Tool made available by EASME for any contractual issues.

SME2EU - Organisation chart: please see file PART B uploaded format.

2. Description of work - follow-up and quality control system - milestones

Task PM.1: SME2EU Partners internal Project Management

The Project Management will be implemented internally to each HO by each SME2EU Partner through its Senior staff for Project Management according to its HO Managers directives.

Tasks PM.2: SME2EU Partners WP Management

Each Partners WP Leaders will coordinate the other Partners involved in the WP and plan precisely and concretely the objectives and activities to be implemented by each Partners involved, the deliverables, the outputs, the outcomes, the impact of the WP, the human resources and costs necessary. Each WP Leader will coordinate the other Partners to implement the WP and will monitor the working in progress of the WP implementation to verify the activities realised versus the planned and define eventual actions to recover and avoid risk of performance.

Task PM.3: SME2EU Consortium global Project Management

The P1 Coordinator will organise meetings every two months via web conference for 6 minimum number of consortium meetings every year in order to discuss the common strategy and actions for implementing the project. The P1 Coordinator will produce a synthetic report at the end of every meeting to sum up important issues discussed and decisions assumed.

Task PM.4: SME2EU Consortium Monitoring and Reporting

During the 6 yearly meetings P1 Coordinator and Partners will analyse the work in progress of the project, monitoring regularly:

- The outputs, outcomes, achievements to be performed by the SME2EU Consortium Partners;
- The participation in Network activities and the Feedback from other Network events;
- The implementation of the Communication strategy.

The SME2EU Consortium for Monitoring and Reporting Tasks will use:

- a common internal management tool as described in the Implementation Strategy Chapter 8 and 9
- the EASME monitoring system that will be put in place. In particular:
 - a) after the first six months of the project the Partners will participate to the EASME inception survey based on standard checklist
 - b) after 12 and 24 months of the project the Partners will submit the Quantitative report on 16 data items and the self-assessment of the SME2EU Consortium;
 - c) after 18 months the Partners will submit the Summary of the conclusions from completed questionnaires on the extent to which the expectations for months 1 to 6 have been attained;
 - d) after 24 months SME2EU Consortium will submit a technical implementation report formed by three parts: Quantitative Report, Narrative Report, Summary of the conclusions from the completed questionnaires on the extent to which the expectations for months 7 to 12 have been attained.

Task PM.5: Quality management – Clients satisfaction

Quality control system will be implemented through feedback gathered from clients who have received Network services or attended events, to measure their satisfaction. The Code of Conduct will be signed and put into practice by all the SME2EU Partners.

Task PM.6: EEN Follow up activities

The follow up will be realised by the SME2EU Partners to collect the Achievement of EEN activities.

Task PM.7: Impact measurement

The impact about the positive effects of the Network's activities and services on businesses in terms of results (products, services, market shares, etc.), efficiency (cost reduction), employment (job creation or preservation), quality improvement (goods or services, client satisfaction, etc.) or innovation will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40). The impact will be

- 1) on the expected impact of the services delivered by the Network;
- 2) expectations attained (submitted to clients approximately one year after the service has been delivered).

Description of work and role of partners

WP6 - Project Management [Months: 1-24]

METROPOLI, Confindustria Toscana, Eurosportello Confesercenti, CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO, Compagnia delle Opere Pesaro Urbino, CENTROESTEROUMBRIA, SVILUPPUMBRIA SPA

3. Role of each partner

The SME2EU Coordinator is P1 while the Partners are Leaders of the following EEN activities:

P1 Coordinator: WP Project Management

P2: Leader of WP 6 EEN activities

P3: Leader of WP 4 EEN activities

P4: Leader of WP 5 EEN activities

P5: Leader of WP 3 EEN activities

P6: Leader of WP 1 EEN activities

P7: Leader of WP 2 EEN activities

Subcontracting costs are not foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME.

According to the art. 5 D of the EASME Model EEN SGA COSME the costs necessary to P1 for the service of hosting Internal Management Tool (IMT) (installing, upgrading, taking backup,..) have been inserted in the budget in the cost category named “Costs of other services”.

Participation per Partner

Partner number and short name	WP6 effort
1 - METROPOLI	5.12
2 - Confindustria Toscana	3.46
3 - Eurosportello Confesercenti	5.73
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00
Piceno Promozione	2.73
5 - Compagnia delle Opere Pesaro Urbino	1.78
6 - CENTROESTEROUMBRIA	1.24
7 - SVILUPPUMBRIA SPA	1.63
Total	21.69

List of deliverables

Deliverable Number ¹⁴	Deliverable Title	Lead beneficiary	Type ¹⁵	Dissemination level ¹⁶	Due Date (in months) ¹⁷
D6.1	Project Management - Progress Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	12
D6.2	Project Management - Final Technical Report	1 - METROPOLI	Report	Confidential, only for members of the consortium (including the Commission Services)	24

Description of deliverables

4. Deliverables

DPM.1 List of internal meetings of each HO, provided by each partner, updated 6 times a year.

DPM.2 WP Plans, provided by each leader, updated 6 times a year.

DPM.3 Synthetic Reports of Senior council meetings provided by P1, updated 6 times a year.

DPM.4a Inception Survey, provided by each partner according to EASME date indication.

DPM.4b Quantitative report, provided by each partner according to EASME date indication.

DPM.4c Summary of the conclusions, provided by each partner according to EASME date indication

DPM.4d Narrative report, provided by each partner according to EASME date indication.

DPM.5 Code of Conduct signature, signed by each partner within 3months from the beginning of the project.

DPM.6: Achievement Form, provided by each partner after the achievement is acquired.

DPM.7: EASME 2 questionnaires, provided by each partner according to EASME date indication.

D6.1 : Project Management - Progress Report [12]

Progress Report for Project Management, as defined by EASME
D6.2 : Project Mangement - Final Technical Report [24]
Final Technical Report for Project Management, as defined by EASME

Schedule of relevant Milestones

Milestone number ¹⁸	Milestone title	Lead beneficiary	Due Date (in months)	Means of verification
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1.3.4. WT4 List of milestones

Milestone number ¹⁸	Milestone title	WP number ⁹	Lead beneficiary	Due Date (in months) ¹⁷	Means of verification
MS1	PR - implementation of the Code of Conduct		1 - METROPOLI	12	Experience report on implementation of the Code of Conduct, as defined by EASME
MS2	PR - Implementation of the Thematic Contact Points		1 - METROPOLI	12	Experience report on implementation of the Thematic Contact Points, as defined by EASME
MS3	FTR - Implementation of the Code of Conduct		1 - METROPOLI	24	Experience report on implementation of the Code of Conduct, as defined by EASME
MS4	FTR - Implementation of the Thematic Contact Points		1 - METROPOLI	24	Experience report on implementation of the Thematic Contact Points, as defined by EASME

1.3.5. WT5 Critical Implementation risks and mitigation actions

No risks indicated

1.3.6. WT6 Summary of project effort in person-months

	WP1	WP2	WP3	WP4	WP5	WP6	Total Person/Months per Participant
1 - METROPOLI	37.62	25.54	4.25	9.98	15.58	5.12	98.09
2 - Confindustria Toscana	19.93	12.53	1.27	10.38	8.72	3.46	56.29
· CTS	4.22	3.56	0.60	0	1.24	0	9.62
3 - Eurosportello Confesercenti	31.04	38.56	4.06	19.92	15.29	5.73	114.60
4 - CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0	0	0	0	0	0	0
· Piceno Promozione	15.33	16.41	1.65	10.94	7.66	2.73	54.72
5 - Compagnia delle Opere Pesaro Urbino	14.21	8.89	1.76	5.29	3.57	1.78	35.50
6 - CENTROESTEROMBRIA	9.88	6.18	1.24	3.72	2.48	1.24	24.74
7 - SVILUPPUMBRIA SPA	8	12.60	0	6.64	4.44	1.63	33.31
Total Person/Months	140.23	124.27	14.83	66.87	58.98	21.69	426.87

1.3.7. WT7 Tentative schedule of project reviews

No project reviews indicated

1.4. Ethics Requirements

No ethics requirements indicated

1. Project number

The project number has been assigned by the Commission as the unique identifier for your project. It cannot be changed. The project number **should appear on each page of the grant agreement preparation documents (part A and part B)** to prevent errors during its handling.

2. Project acronym

Use the project acronym as given in the submitted proposal. It can generally not be changed. The same acronym **should appear on each page of the grant agreement preparation documents (part A and part B)** to prevent errors during its handling.

3. Project title

Use the title (preferably no longer than 200 characters) as indicated in the submitted proposal. Minor corrections are possible if agreed during the preparation of the grant agreement.

4. Starting date

Unless a specific (fixed) starting date is duly justified and agreed upon during the preparation of the Grant Agreement, the project will start on the first day of the month following the entry into force of the Grant Agreement (NB : entry into force = signature by the Commission). Please note that if a fixed starting date is used, you will be required to provide a written justification.

5. Duration

Insert the duration of the project in full months.

6. Call (part) identifier

The Call (part) identifier is the reference number given in the call or part of the call you were addressing, as indicated in the publication of the call in the Official Journal of the European Union. You have to use the identifier given by the Commission in the letter inviting to prepare the grant agreement.

7. Abstract

8. Project Entry Month

The month at which the participant joined the consortium, month 1 marking the start date of the project, and all other start dates being relative to this start date.

9. Work Package number

Work package number: WP1, WP2, WP3, ..., WPn

10. Lead beneficiary

This must be one of the beneficiaries in the grant (not a third party) - Number of the beneficiary leading the work in this work package

11. Person-months per work package

The total number of person-months allocated to each work package.

12. Start month

Relative start date for the work in the specific work packages, month 1 marking the start date of the project, and all other start dates being relative to this start date.

13. End month

Relative end date, month 1 marking the start date of the project, and all end dates being relative to this start date.

14. Deliverable number

Deliverable numbers: D1 - Dn

15. Type

Please indicate the type of the deliverable using one of the following codes:

- R Document, report
- DEM Demonstrator, pilot, prototype
- DEC Websites, patent filings, videos, etc.
- OTHER

16. Dissemination level

Please indicate the dissemination level using one of the following codes:

- PU Public

CO Confidential, only for members of the consortium (including the Commission Services)
EU-RES Classified Information: RESTREINT UE (Commission Decision 2005/444/EC)
EU-CON Classified Information: CONFIDENTIEL UE (Commission Decision 2005/444/EC)
EU-SEC Classified Information: SECRET UE (Commission Decision 2005/444/EC)

17. Delivery date for Deliverable

Month in which the deliverables will be available, month 1 marking the start date of the project, and all delivery dates being relative to this start date.

18. Milestone number

Milestone number: MS1, MS2, ..., MSn

19. Review number

Review number: RV1, RV2, ..., RVn

20. Installation Number

Number progressively the installations of a same infrastructure. An installation is a part of an infrastructure that could be used independently from the rest.

21. Installation country

Code of the country where the installation is located or IO if the access provider (the beneficiary or linked third party) is an international organization, an ERIC or a similar legal entity.

22. Type of access

VA if virtual access,
TA-uc if trans-national access with access costs declared on the basis of unit cost,
TA-ac if trans-national access with access costs declared as actual costs, and
TA-cb if trans-national access with access costs declared as a combination of actual costs and costs on the basis of unit cost.

23. Access costs

Cost of the access provided under the project. For virtual access fill only the second column. For trans-national access fill one of the two columns or both according to the way access costs are declared. Trans-national access costs on the basis of unit cost will result from the unit cost by the quantity of access to be provided.

Annex 1 to the Grant Agreement (Description of the Action)

COSME Grant Agreement (GA)

PART B

History of changes

In this section you must record all changes implemented in comparison with the submitted proposal.

P7 Umbria Innovazione (UI) has been substituted by Sviluppumbria (SVIL) everywhere in the

- Work Programme,
- Budget,
- PES HRS SER form

because Umbria Innovazione merged into Sviluppumbria since 23 December 2014.

➤ Work Programme

Chapter 1.6 on page 6 and Chapter 2.6 on page 12:

The indicative breakdown for the two activities producing Achievements (DI12), in particular ASOs for WP1 (Advice, support and information activities) and PAs for WP2 (Cross-border partnering activities for business cooperation, technology transfer, innovation and research) has been added, also in the respectively Outcomes table

Outcomes								
DI12 Achievements - ASOs	4	3	2	2	2	2	1	16
DI12 Achievements - PAs	5	7	11	6	2	2	7	40
DI12 Achievements - Total	9	10	13	8	4	4	8	56

On Pages 6, 11, 15, 19, 23, 27 the sentences on FTE's have been removed because requested and detailed in the Participant Portal, following the EASME instructions received in April 2015.

➤ Budget

P7 SVIL added two more EEN staff person without any changes on the Total eligible costs.

A 3rd Party "Budget Note" was added, following the EASME instructions received in May 2015, at page 40 bis of the Budget and it is related to:

- Third Party organization Confindustria Toscana Servizi (CTS), Linked to Beneficiary Confindustria Toscana (CT);
- Third Party organization Piceno Promozione (PP), Linked to Beneficiary Camera di Commercio Industria Artigianato e Agricoltura di Ascoli Piceno (AP).

➤ PES HRS SER form

P7 SVIL changed the HRS due to the EEN staff changes maintaining the balances requested.

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- WP1. Advice, support and information activities	page 4
- WP2. Cross-border partnering activities for business cooperation, technology transfer, innovation and research	page 9
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- WP4. Not applicable	page 17
- WP5. Promotion of the Network's services and communication activities	page 17
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➤ Budget	page 30
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ANNEX 1 – WORK PROGRAMME

COSME

Consultation of Enterprise Europe Network on Cosme Work programme 2015-2016

COSME-2014-2.7

Project acronym:	SME2EU
Proposal reference number in SEP:	210230496
Project action duration:	2015 – 2016
Start date:	1 January 2015
Coordinating organisation:	PromoFirenze (PF)
Number of partners:	7
Region(s) covered <i>(when applicable indicate NUTS nbr.):</i>	Toscana, Marche, Umbria (Italy)

Structure

- *All pages should be numbered.*
- *Each page should be headed with the project acronym and drafting date.*
- *The document should not exceed 25 pages.*
- *An indicative number of four pages per work package is suggested.*

WP 1. Advice, support and information activities (at least 20% of total FTE's)

1.1 Specific objective(s) of the activity

The SME2EU Consortium's specific objective of advice, support and information activities is to increase the competitiveness and innovation capacities of European SMEs.

The capacities of SMEs to compete, innovate and internationalise will be supported through tailored services aiming at the following sub-objectives:

- a. Improving SME **knowledge** about EU legislation, policies, decision processes, standards in the Single Market, grant & tender opportunities, International, National and regional grants and public procurements, EU programmes and European funding opportunities (with a particular focus on COSME, Horizon 2020, programmes for international cooperation and internationalisation, ESI funds);
- b. Facilitating cross-border **innovation** and **technology transfer** activities introducing clients or supporting them in innovation related issues.
- c. Improving SMEs **market penetration** and identify new business opportunities by providing and stimulating internalisation of measure of market intelligence, identification of markets, comprehension of local business conditions;
- d. Enabling an easier and faster **access to financial resources**, both from the public environment (grants, pre-seed public measures, etc) and from private one (banks, seed capital, venture capital business angels, crowd funding, crowd investments, etc) through actions aiming at raising awareness of different source of finance ("all money is not the same"), assess/self assess the investment readiness, signposting to business planning programmes/facilities.
- e. Improving the **management capacities** of SMEs in order to raise business performance and achieve sustainable growth - in particular with a view to withstanding the competitive pressures on the Single Market and on international markets.
- f. Raising awareness and support of intellectual property, enabling SMEs to exploit their **IP** at the international level.

1.2 Target group/audience

The main targets for SME2EU Consortium's, as described in the Implementation Strategy Chapter 2, are micro and SMEs; inventors, universities, research organisations, clusters, innovation poles, technology clusters, large corporations and other actors in innovation-related industries are seen as other potential **direct beneficiaries** of the Network's activities.

Priority for highly specialised services will be given to SMEs having high growth potential for innovation and internationalisation and aggregations of SMEs regardless their formal definition, i.e. Clusters, Poles of Innovation, Networks, Districts, etc. In this contest a target of special interest are START-UPS, especially "Innovative START-Ups" that thanks to a new, extremely favorable, legislative framework promise to become soon a strong engine for the economy and employment growth of the country.

Beyond supporting the processes of innovation, industrialisation and re-industrialisation of the traditional Made in Italy companies, which represent the backbone of the economy of the three regions, particular focus will be directed to the sectors identified in the regional Smart Specialisation Strategies:

Toscana: Life Sciences and Neuroscience, Robotics and Biorobotics, Knowledge acceleration systems, Photonics, Silicon Photonics, High Energy Physics, Nanotechnology, Nanomaterials and new materials. Research Areas Across Sectors: Cultural Heritage, Social Innovation, Renewable Energy, Environmental technologies, Research on Climate, Agriculture and Forestry, Space and Aerospace.

Marche: Mechatronics (Robotics, Automation, Smart products, micro-mechanics, biomedical, Advanced product design systems), Sustainable Manufacturing (Advanced Materials, Eco Design in Manufacturing Process, Demanufacturing, Human Centered Manufacturing), Health and Domotics.

Umbria: Agro-food, green chemistry, energy, intelligent manufacturing, life sciences.

Indirect beneficiaries include local, regional, and national authorities and policymakers, trade associations, associations of employers and manufacturers and other stakeholders with a role or interest in supporting economic development, competitiveness, innovation or innovation management, technology transfer, exploiting research results and IP, and other related areas.

1.3 Description of work, methodology and tools

The SME2EU Consortium Partners guarantees full coverage of all services to the entire geographic area; if a highly specific assistance cannot be delivered by one regional partner, the assistance will be delivered by another regional or consortium partner. Some services in WP1 will also be provided through and by stakeholders, as indicated in the Implementation Strategy.

In addition to serving existing clients and seeking new ones through events, communications activities, signposting from stakeholders, etc., specific monitoring and recruitment will be maintained to identify promising SMEs to be offered services under Activity 4 – Enhancing SMEs Innovation Management Capacity. Cooperation with regional stakeholders will ensure a further access point to the Network; use of the stakeholder widget is expected to bring new clients.

Besides cooperation with stakeholders will also help avoid overlapping services in the same geographical area and to contribute to assuring a seamless, high quality business support environment for the direct and indirect beneficiaries.

Information will be provided by answering questions submitted by clients directly to the partner's region, by scheduled or drop-in meetings at the partner office, scheduled appointments at the client's facilities, by phone, through email and the HO website, and during events. Questions that cannot be answered internally by the partner will be signposted to other partners or if necessary, to other regional experts and organisations including those who have signed a collaboration agreement with the Consortium.

Questions & Answers and a client database may be recorded by partners according to their own internal procedures and tools.

The tasks planned for WP1 are as follows:

Task 1.1 Information Activities, regarding all EU-related issues that can be relevant to SME:

- EU legislation, policies and standards
- Tender opportunities and public procurement
- EU programmes and structural Funds (R&I, Internationalization, training, energy efficiency,...)
- Access to finance
- IPR issues

Each partner will manage activities in relation to its expertise, and in any case all the topics will be covered in each region. Information activities will mainly be delivered through electronic means, mainly newsletter, e-mails, website and social media.

In some cases, especially for topics related to Funds and Access to finances, partners will try to integrate EU opportunities with National and Regional funds, when suitable, in order to give clients an exhaustive survey of all accessible opportunities to reach their goal (this will be valid also for Task 1.4). Some of these information will be targeted to particular sectors in relation to clients' needs or agreements with stakeholders, in this last case the informative material could be realised also with the support of stakeholders.

Task 1.2 – For some clients, partners will offer the benefit of an **AUDIT/REVIEW focused on the client's business, technology or innovation capacity**. Business audit/review includes business assessment, evaluation of innovative ideas and projects or management capacities, in view of identifying areas where the company could benefit from advisory, brokerage or other network services. Technology and research/Innovation audits will focus on a company's products, processes, R&I needs or R&I offer, also aimed at offering other specific appropriate network services. These visits will be targeted mainly to SMEs having high growth potential and innovative start-ups. Visits will be conducted by staff able to investigate and define the companies' internationalisation problems and needs and their potential in terms of products, technologies and innovation expertise. Some background information will be gathered before the visit from the company's web site.

During the visit, supplementary information (such as technical sheets on products, research results and other assets and industrial property, descriptions of innovative processes) will be collected. During visits the partners will present the network service offer to the company, highlighting those most suitable for the company's situation and requirements. Promotional material may be distributed. Partners will use their own internal methodologies and questionnaires, or apply those from the best practices database.

Task 1.3 Advisory & Support Services to Clients regarding EU topics. Partners provide specific answers to client questions, regarding same topics of Task 1.1, and also answer inquiries from Network partners on behalf of their clients (including about Italy-specific topics). These are individual and tailor made advice and support services, including answers to complex questions, requiring more intensive and added-value service. P7 will directly provide tailored advice, research and support services regarding industrial property (identifying assets that can be exploited, performing prior-art searches, providing information about how to apply for a patent and extend it to additional countries, signposting to possible regional or national financial incentives or other support for patenting activities). All other partners will manage these activities through Stakeholders.

Task 1.4 Informative and formative Events. In relation to topics of Task 1.1 for some topics of special interest informative events (conferences, seminars) will be organised to provide a deeper presentation of subjects and an interaction with clients for doubts and enquiries. When suitable and useful some speakers and presentations of these events will be recorded and published online. The organisation of streaming events will also be considered. These events will have a special focus on specific themes on which the EEN provides added-value services like internationalisation and competitiveness, innovation and technology transfer, innovation-related issues ("open innovation", "design-driven innovation", "eco-design", etc.), IPR.

Some more specialised events will have a training structure (workshop), with experts trainers working with the audience. The training events will be targeted mainly to SMEs having high growth potential both regarding innovation or competitiveness and market penetration. Special attention will be devoted to Innovative start ups with topics related to the entire life cycle of the enterprise (start, growth, ripening).

In this Task the collaboration with Stakeholders will be very close, both for organization and promotion of events, to better tune the activities to the clients' needs, especially for realising specific sector events.

Regarding Access to Finance instruments, besides Public Funding opportunities also Banks instruments will be promoted through joint events with Credit Institutes. Crowd-funding will be another important topic.

This task also includes participation as a speaker at events focused on EU related matters or where European topics bring added-value, that are organised by another network partner, as well as those organised by stakeholders (and indirect beneficiaries) at local, regional, national and EU levels.

Task 1.5 Further added-value services. Some partners in addition to the previous services may offer other further Added Value services.

- Study tours especially for young entrepreneurs.
- Support services to manage the B2B and Company mission contact results.
- Others.

1.4 Role of each partner, need to subcontract if any, subcontractor

The SME2EU Consortium Partners will assure provision of the qualified professional services in the geographic area; in some cases they will signpost among themselves and for some services, to stakeholders.

Summary of activities provided by each partner:

Standard Activities	Partners						
	TOSCANA			MARCHE		UMBRIA	
	P1	P2	P3	P4	P5	P6	P7
1. Advice, support and information activities							
EU legislation and policies, standards in the Single Market, tender opportunities, public procurement etc	X	X	X	X	X	X	
EU programmes and funding opportunities		X	X	X	X	X	X
Innovation and technology transfer services to facilitate cross-border innovation and technology transfer activities....		X	X	X			X
Support on market intelligence, identification of suitable growth markets, local business conditions, and on capacity building for SMEs	X	X		X	X		X
Access to finance for SMEs	X	X	X	X	X	X	X
Support for improving the management capacities of SMEs		X	X		X	X	X
Raising awareness of intellectual property (IP) issues	so	so	so	so	so		X
Energy and resource efficiency	so	so	so	so	so		X

*so: stakeholders

Subcontracting costs are not foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME.

According to the art. 5 D of the EASME Model EEN SGA COSME the costs necessary to concerned partners for realizing local and regional events (room and technical audio/video equipment renting, catering, interpreters, transport for participants, speakers fees including their travels and subsistence allowances etc ...) have been inserted in the budget in the cost category named "Costs of other services".

Name of Network partner	Role	Special skills	Main tasks	Type of staff needed
P1 PF	Advisory Service Provider	Management, Communication and Dissemination, Technical skills	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	Senior Staff;
P2 CT	Advisory Service Provider	Management, Communication and Dissemination, Technical skills	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	Senior staff; Junior Staff; Expert
P3 EUC	Advisory Service Provider	Management, Communication and Dissemination, Technical skills	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	Senior staff; Junior staff;
P4 AP	Advisory Service Provider	Management, Communication and Dissemination, Technical skills	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	EEN project manager; Senior Staff
P5 CDO	Advisory Service Provider	Management, Communication and Dissemination, Technical skills	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	Senior staff; Expert
P6 CEU - WP leader	Advisory Service Provider	Management, Communication and Dissemination,	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	Senior Staff; Experts

		Technical skills		
P7 SVIL	Advisory Service Provider	Management, Communication and Dissemination, Technical skills	T1.1 T1.2 T1.3 T1.4, T1.5 (to be evaluated)	Senior specialists; Expert

1.5 . Deliverables

D1.1 List of Service Types Provided by each partner updated every 6 months.

D1.2 Rolling plan of local/regional events planned/head, updated every 2 months during SME2EU Consortium meetings.

1.6 Outputs, outcomes and impact

a) The outputs and outcomes are linked to the following data items:

Output:

DI.1Regional/local events organised: number of regional/local events organised in partner's own territory or in another Network territory

DI.2Participants in regional/local events: attendees at the events which have been organised by the network partners.

DI.3SMEs/clients receiving individual advisory support: number of clients which have been received the advisory services provided by the network.

Outcomes:

DI.12 Achievements: These are results/objectives attained by an SME or other client, in which its competitiveness and innovative capacities have been improved through services provided in WP1. Examples could be financing obtained, patents applied for, tenders in other countries successfully applied for, etc.

Note that the number of Achievements indicates the total of the indicative breakdown for the two activities producing Achievements: ASOs for WP1 (Advice, support and information activities) and PAs for WP2 (Cross-border partnering activities for business cooperation, technology transfer, innovation and research).

b) The 2-year targets for outputs and outcomes are as follows:

Indicators	P1	P2	P3	P4	P5	P6	P7	SUM
Outputs								
DI.1 # of Regional/local events organised	16	23	23	10	6	6	2	86
DI.2 # of Participants in regional/local events	600	540	550	450	180	450	225	2995
DI. 3 SMEs/clients receiving individual advisory support	120	150	150	85	57	70	81	713
Outcomes								
DI12 Achievements - ASOs	4	3	2	2	2	2	1	16
DI12 Achievements - PAs	5	7	11	6	2	2	7	40
DI12 Achievements - Total	9	10	13	8	4	4	8	56

c) Impact Indicators and their measurement

The positive effects of the Network in the frame of **WP1 "Advice, Support and Information"** will be assessed against the all 5 impact indicators (market improvement, cost savings, job creation or maintenance, quality improvement, innovation): the impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40). In particular, the SME2EU Consortium will collect the information needed to complete the EASME questionnaires from all clients which have an Achievement (such as successfully developing a new cross-border supply chain, entering a new market, implementing an EU regulation, a new IPR filing, etc.) in the period; partners may optionally collect and submit information for other clients that have received services but have not yet registered an Achievement. Partners may also,

when speaking to clients during events, company visits, telephone and email contacts, or through their own client satisfaction questionnaires or other means, collect feedback from them about services received and impacts or benefits from those services.

WP 2. Cross-border partnering activities for business cooperation, technology transfer, innovation and research (At least 25% of total FTE's)

2.1 Specific objective(s) of the activity

SME2EU Consortium Partners will provide assistance covering the entire partnership process, from the identification of suitable partnering opportunities to appropriate advisory services and assistance for successful entry into the target market(s) or sector(s). Each SME2EU Consortium Partner will work to assist its micro and SMEs and other clients in achieving successful partnering for business and commercial collaboration, innovation and technology transfer, and their participation in R&D activities and in European research programmes provided with professionalism and expertise and respect for the no wrong door principle.

2.2 Target group/audience

The Cross-border partnering activities will be addressed to the target groups mentioned in the Implementation Strategy Chapter 2. Indeed, these activities are of fundamental importance in the three regions of the SME2EU Consortium, where aspects of development relevant to the territory and linked to exporting and innovation processes must be supported and expanded.

Companies in Toscana, Marche and Umbria are increasingly oriented to international markets, they have contributed considerably to Italian export statistics, thanks to the 3Fs of Made in Italy (Food, Fashion, Furniture) and to other specific innovative sectors that maintain quality and excellence of products and processes. In both aspects, networks of companies represent, as already highlighted in the Implementation Strategy, a concrete answer of the territory with more than 900 involved (Toscana is third nationwide for this, with 578 such companies.)

2.3 Description of work, methodology and tools

The SME2EU Consortium Partners will offer services for cross-border partnering to the target clients with a high potential for internationalization and/or innovation and/or already involved in such activities. The SME2EU Consortium Partners will also support clients signposted from other service providers or activities, including SMEs and others that have received advisory services described in WP1, beneficiaries of the SME instrument, entrepreneurs who have attended events or learned about the Network through its promotion activities, etc.

New EEN clients will be actively recruited through synergy with Host Organization (HO) taking advantage of its tools and activities (website, seminars on innovation, competitiveness and related subjects, relationships with universities, clusters, stakeholders, etc.). HO staff, whose daily work brings them in contact with SMEs and other potential clients, will be ready to signpost these companies to the SME2EU Consortium staff experts in Cross-border partnering activities who have supported clients in attaining 49 Partnership Agreements in 2011-2013.

The SME2EU Consortium Partners will carry out the Cross-border partnering activities according to the following tasks:

Task 2.1 Brokerage/Matchmaking Events (B2B) and Company Missions (CM)

To encourage participation of local clients in brokerage events and company missions, especially those being held in other EEN Countries, partners will monitor and promote, through 1-to-many means, brokerage events (including through use of POD query alerts) announced on the European EEN web site considering economic sectors relevant for the target clients located in the three Regions. The SME2EU Consortium Partners choosing B2B/CM events to be promoted will also consider any feedback or information made available by EASME about success rates of different events. Some SME2EU Consortium Partners will be involved in co-organising B2B/CM.

In addition to promoting and participating in B2B/CM organised in territories outside the Consortium's area, some SME2EU Consortium Partners will also organise partnering events in their own territories such as "Matching event" organized by P5, and "Meet in Italy for Life Sciences", the first B2B entirely focused on Life Sciences hold in Italy (the first edition in 2014) organised by P2 with the co-organisation of other Italian and international Network Partners. It will become a permanent yearly Network event, to be held in different Italian regions, co-organised by many EEN partners in different regions and abroad, and involving all major national stakeholders as well as others from beyond Italy. The 2015 edition will be in Milan, the 2016 in Rome.

A brokerage event will be organised in the context of EXPO 2015 and it will promoted by all Italian EEN partners and co-organised by some of them. The EXPO itself will run from 1 May to 31 October 2015 and the Italian EEN consortia will agree on the timing, sectors, and other details of the related brokerage event.

For all B2B/CM in which it has client(s) participating, a SME2EU Consortium Partners will support clients in registering for events and inserting their company and cooperation profiles, in selecting partners and requesting appointments, and for some events, during their meetings. SME2EU Consortium Partners present at events will, to the extent possible, support the clients of absent consortium partners.

In order to multiply the advantages of membership, the consortium partners who belong to Sector Groups will proactively inform the others about upcoming important B2B/CM and other partnering initiatives. Similarly, SME2EU Consortium Partners organising or co-organising B2B/CM will inform the entire consortium about them, and all such events will receive particular promotion: SME2EU Consortium clients will be informed about those events, and of the added benefit of a consortium partner available to provide any needed personalised support for validation of profiles and, where appropriate, during the event itself.

These events co-organised by a consortium member, as well as other cross border partnering events, will be promoted on the SME2EU website. Partners will also use their internal tools and methods (newsletters, websites, personal contacts, etc.) to publicise selected B2B/CM.

A best practice experimented for the B2B Meet in Italy for Life Sciences that SME2EU consortium will promote and propose also in different occasions and types of events was the option for clients where to present themselves and their needs through elevator pitches. The pitches were recorded and published on a dedicated YouTube channel, leveraging the benefit with an additional, lasting and wide visibility to clients and to promote the event.

To support its clients in adopting resource efficiency measures, SME2EU Partners will pay extra attention to promoting B2B/CM that involve resource efficiency techniques, solutions and technologies (advice on waste minimization, energy saving and energy efficiency, recycling and using recycled materials, opportunities for industrial symbiosis and new business models, green products and services).

In addition, the following specific sectors are expected to receive particular focus from the following partners: Tourism (P1, P3) Agro-food (P1, P3, P4, P5, P6), Fashion-Textiles-Leather (P1, P2, P6), Energy efficiency/renewable sources (P3, P4, P6, P7), Environment (P3, P4, P7), Life sciences (P2, P7), ICT (P3), Cultural Heritage (P1,P3), Construction (P1, P5), Nautical (P2, P6), Mechanics (P2, P3, P5, P6), Furnishing (P1, P5, P6).

Task 2.2. Creation of 3 Type of Partnering Profiles:

The types of partnering profiles are:

2.2.1 Business Offers and Requests

2.2.2 Technology Offers and Requests

Each SME2EU Consortium Partner will use its internal processes and expertise to assist clients in identifying their commercial and technology and assets (expertise, products, patents, other tangibles or intangibles), which can be published as business and technology offers in defining any needs for which they can seek solutions from cross-border partners through business and technology requests.

SME2EU Consortium Partners will prepare, insert and internally review the profiles based on information collected from clients.

Based on knowledge of its own client base and more generally its territory, SME2EU Consortium Partners will select profiles from the Partnering Opportunities Database (POD) for **dissemination** by targeted emails, newsletters, websites, tweets, blogs and other one-to-many methods, as well as offering

customised searches for a one-to-one service.

SME2EU Consortium Partners will install the POD widget (or another tool with similar function if made available by EASME) on their HO websites and/or section devoted to Network activities, to allow their clients and other website visitors to search the partnering profile database.

2.2.3 Research

SME2EU Consortium Clients will be supported in facilitating the access to research co-financing opportunities, offering them the Partner search Service for joining Research projects, whether as RDRs or partner searches posted using network internal communications such as the Merlin Forums, will be selected and sent to targeted clients. Those clients without previous experience in co-financed projects, but interested and ready to participate, will receive advice and guidance in how to proceed (including under WP1 services). Those with more experience or readiness, or having a project idea they wish to develop, will receive support for finding an appropriate call and, through publication of RDRs, locating qualified cross-border partners to complete their research consortium. Calls and partner searches relative to energy and resource efficiency (for example, financial incentives for resource efficiency and green products or services, etc.) will receive targeted promotion.

Task 2.3 Publication and diffusion of Partnering Profiles:

The above mentioned types of partnering profiles will receive publication and diffusion:

Publication: the service of publishing profiles from the SME2EU Consortium's territory will be offered mainly to more "structured" clients, that is, those with the outlook and resources (including organisational and linguistic) to carry out international cooperation/ business relationships.

Diffusion: each SME2EU Partners will inform its clients about profiles from the EEN using its own internal methods and tools, as further described in WP5. Profiles will be selected on the basis of priorities already noted above, as well as according to any specific client needs and priorities that may be determined.

Because many profile abstracts are translated into Italian to facilitate their publication in newsletters, HO websites and in emails, the SME2EU Consortium will share translations made by one partner to all the others. The sharing will work as follows: when a partner selects a profile for translation, it will first check to see if a translation already exists on the SME2EU website, and if so, use that. If no translation is found, the partner will make its own translation and post it to the website so that the others may use it. This "wiki" approach offers two distinct advantages: it allows all to benefit from a shared workload, without any burdensome procedures to manage the profile selection and division of work; and it will also assure that the SME2EU Consortium website is frequently updated with fresh content.

SME2EU Consortium Partners will encourage and support appropriate clients in registering to receive query alerts from the POD, since this is a method with demonstrated efficiency and effectiveness to allow clients to set their own search criteria and change them as often as needed, in order to find profiles that respond to their evolving requirements.

SME2EU Consortium Partners will share with clusters, innovation poles and other suitable stakeholders all the targeted updated opportunities and cooperation profiles thorough specific and tailor-made e-mails, newsletter or other. Using the stakeholder widget, or other EASME tool, they could publish them on their portals. This is a powerful and essentially no-cost way to promote the Network, perhaps recruit new clients, provide self-updating value-added content to stakeholders, and potentially increases outgoing Eols, partnering and achievements.

Task 2.4 Expressions of Interest (Eols) Management

EOIs for the three types of profiles will be managed as follows:

Eols received for its clients' profiles will be monitored, and SME2EU Consortium Partners will act to ensure that their clients reply to all Eols they receive, promptly and professionally; Network Partners will be kept informed of any developments. Similarly, for **Eols made** by its clients for a foreign profile, SME2EU Consortium Partners will track the status of contacts and their own clients' responsiveness, and update (and if needed, solicit help from) their Network colleagues.

Task 2.5 Follow up of Cross Border Partnering Activities

SME2EU Consortium Partners will monitor:

- the B2B/CM or other activities

- the status of Eols from and toward its clients, regardless of the origin of the contact in order to ensure that its own clients, other Network partners and their clients receive information and status updates

to detect the conclusion of transnational Partnership Agreement.

The principles of responsiveness, responsibility and professionalism set forth in the Code of Conduct will be followed. Network partners will be kept informed of any developments and asked to intervene when needed.

2.4 Role of each partner, need to subcontract if any, subcontractor

SME2EU Consortium Partners will assign to the project core staff who bring expertise and experience in providing support services for international partnering to SMEs and other clients, proven during the previous programme and practiced in our daily activities. Each SME2EU Consortium Partners will provide Cross Border Partnering Activities with the exact nature of outputs determined by its own expertise, methods and mission and by territorial characteristics, for example some partners will focus on company missions or brokerage events, organised, co-organized and promoted.

Summary of activities provided by each partner:

		SME2EU Partners							
		TOSCANA			MARCHE		UMBRIA		
		P1	P2	P3	P4	P5	P6	P7	
Service num.	Standard Activities								
	2. Cross-border partnering activities for business cooperation, technology transfer and innovation								
10	Partnering services on Business / commercial collaboration	X	X	X	X	X	X	X	
11	Partnering services on Innovation / technology transfer		X	X	X			X	
12	Partnering services on R&D activities of SMEs in European research programmes		X	X	X	X		X	

Subcontracting costs are not foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME.

According to the art. 5 D of the EASME Model EEN SGA COSME the costs necessary to concerned partners for realizing brokerage event and company mission (room and equipment renting, stands, catering, interpreters, transport for participants,...) have been inserted in the budget in the cost category named "Costs of other services".

Name of Network partner	Role	Special skills	Main tasks	Type of staff needed
P1 PF P5 CDO	Cross-border partnering services: business cooperation	Business profiling; Access to market; Organizational; Communication	T2.1, T2.2.1, T2.3, T2.4, T2.5	PF: Senior Staff CDO: Senior staff; Expert
P2 CT P3 EUC P4 AP P7 SVIL WP Leader	Cross-border partnering services: business cooperation; innovation and technology transfer; research	Business and technology profiling; Access to market; Organizational; Communication	T2.1, T2.2.1, T2.2.2, T2.2.3, T2.3, T2.4, T2.5	CT: Senior staff; Junior Staff; Expert. EUC: Senior staff; Junior staff; AP: EEN project manager; Senior Staff SVIL: Senior

				specialists; Expert
P6 CEU	Cross-border partnering services business cooperation; research	Business and technology profiling; Access to market; Organizational; Communication	T2.1, T2.2.1, T2.2.3, T2.3, T2.4, T2.5	Senior Staff; Experts

2.5 . Deliverables

D 2.1: Rolling plan (list) of brokerage events and company missions updated every 2 months, organised, co-organised and/or promoted by Partners through all means employed: **12 lists** updated 6 times a year during SME2EU Consortium meetings.

D 2.2: List of profiles disseminated by the SME2EU Consortium Partners to their clients, through all means employed: **2 year lists** in the project period for Partner.

2.6 Outputs, outcomes and impact

Output: Brokerage events/company missions: number of B2B/CM organised or co-organised, in partner's own territory or in another Network territory;

Output: SMEs/clients in brokerage events/company missions: number of partner's own clients with profiles published in online brokerage event catalogues, or hosting foreign companies for a mission, or travelling to a foreign company mission

Output: Meetings at brokerage events/company missions: number of meetings partner's clients have had with foreign partners participating in a B2B/CM

Output: Partnership profiles produced: number of technology offers (TO), technology requests (TR), business offers (BO), business requests (BR) and cooperative research partner searches (RDR), for the partner's own clients, inserted into the network POD, validated and published

Output: Expressions of interest received: number of expressions of interest received from foreign network partners or companies, for POD profiles or partner searches sent to through internal communications portals (for example on Merlin forum *I Am Looking For*), published on behalf of partner's own clients

Output: Expressions of interest made: number of expressions of interest from partner's own clients, made to foreign profiles published on the POD or partner searches sent through internal communications portals (for example on Merlin forum *I Am Looking For*)

Outcome: Achievements: number of partnership agreements (commercial, technology or research agreements) resulting from partnership proposals/profiles produced and disseminated in the Network, or from brokerage events and company missions involving the Network.

Note that the number of Achievements indicates the total of the indicative breakdown for the two activities producing Achievements: ASOs for WP1 (Advice, support and information activities) and PAs for WP2 (Cross-border partnering activities for business cooperation, technology transfer, innovation and research).

b) The proposed 2-year targets for outputs and outcomes are:

Indicators	P1	P2	P3	P4	P5	P6	P7	SUM
Outputs								
DI04 Brokerage events/company missions organised / co-organised	6	9	4	5	4	2	4	34
DI05 SMEs/clients in brokerage events/company missions	42	50	18	20	32	20	6	188
DI06 Meetings at brokerage events/company missions	84	130	36	60	96	50	8	464
DI07 Partnering profiles produced	50	45	70	30	27	15	14	251

DI08 Expressions of interest received	40	70	70	30	27	10	14	261
DI09 Expressions of interest made	70	70	115	40	40	20	23	378
Outcomes								
DI12 Achievements - ASOs	4	3	2	2	2	2	1	16
DI12 Achievements - PAs	5	7	11	6	2	2	7	40
DI12 Achievements - Total	9	10	13	8	4	4	8	56

c) The impacts expected and their measurement are as follows:

Impacts: Clients receiving services may experience tangible and intangible improvements to their business, in areas such as market improvement, cost savings, job creation or maintenance, quality improvement and innovation/competitiveness.

Measurement: Partners with clients having Achievements in the period will be required to complete the two qualitative questionnaires prepared by EASME for this purpose. The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

WP 3. SME feedback activities (between 3% and 5% of total FTE's)

3.1 Specific objective(s) of the activity

The SME2EU Partners will gather feedback from enterprises, in particular SMEs, on EU legislation, programs or other EU topics on consultation on selected EU policies, actions and legislation, launched by the European Commission according to its specific priorities; regarding difficulties that companies encounter working in the Single Market (SME Feedback Mechanism Database provided by the EU Commission) in order to:

- stimulate their participation in SME business consultation and collect and encode in the IPM database quality SME feedback cases and, if applicable, to signpost them to the national SOLVIT point
- promote the results of changes/improvements of EU policies to SMEs and stakeholders with a particular attention to sector-specific organisation at regional and local levels, as soon as these results are made available by the EU Commission after the analysis managed by the EC DGs concerned. These can be also promoted with the involvement of the national Enterprise Europe Network press officer.
- complement the role of stakeholders in the SME2EU area.

SME2EU Partners will involve clients according to the Consortium communication Strategy and to their own communication channels (web site, newsletter, mailings, article, press releases, and phone calls).

The Partner P5 will assume the role of "SME Feedback Contact Person" within SME2EU.

3.2 Target group/audience

Direct beneficiaries

- Micro and SMEs
- Large Companies
- Potential new entrepreneurs

Indirect Beneficiaries

- Cluster and Cluster organisations
- Technological Poles, Incubators
- Policy Makers
- Public companies
- Public Authorities

- Business associations

Partners P1, P2, P3, P4, P5, and P6 will contact, inform, invite and consult the most representative target group(s) concerned based on the topic of the consultation launched by European Commission, involving the sectorial organisation if needed.

3.3 Description of work, methodology and tools

SME2EU partners will implement the Activities taking into consideration the indications and tools developed and provided by the European Commission and EASME.

P5 is the “SME Feedback Contact Person” for the SME2EU. P5 will be initially assisted by P1 Staff with experience as WG SME Feedback and Coordinator of National Specific Action on SME panel.

P5 SME Feedback Contact Person will implement the following tasks:

Task 3.1 Intermediate with the European Commission and EASME and in liaison with other SME feedback Activities Contact person nominated in the other Italian Consortia.

Task 3.2 EU Documentation processing in order to provide support to other EEN colleagues within SME2EU (methodological and technical) such as:

- Collecting and translating the materials provided by the EC to be delivered to SMEs, (backgrounds, questionnaires,..) into Italian, acting in concert with other Italian SME feedback contact points;
- Providing necessary template for the promotion and for registering the ID number, provided by the EU platform after having encoded SME opinions.

SME2EU Partners will implement the following tasks:

Task 3.3 SME feedback campaigns

- Identifying and selecting relevant SMEs for the consultation topic according to the indications to be provided by EU Commission on each single SME consultation;
- Inviting and consulting companies, organizing activities aimed at involving mainly SMEs such as meetings, events, e-mail, phone interviews for understanding the consultation and encouraging target group to respond;
- Collecting opinions of clients participating in the SME consultation and/or difficulties resulting from EU legislation or policies experienced by companies in the Single Market;
- Submitting data collected to SME Feedback Database and/or redirect it to SOLVIT;
- Disseminating results about improvements and changes to EU policies after the analysis managed by the European Commission to SMEs and, when applicable, sector-specific organizations and other stakeholders as soon as these results will be available according to its own communication channels.

3.4 Role of each partner, need to subcontract if any, subcontractor

The WP Leader **P5** will act as liaison with EC and EASME and will be in charge of preparing and translating all necessary documentation for obtaining feedback.

P5 will organize SME Feedback Campaigns, with methodologies that will be decided in relation to the partner's usual practice, the type of SMEs to be involved and their situations. (**P1, P2, P3, P4, P5, P6**).

Summary of activities provided by each partner:

		SME2EU Partners							
		TOSCANA			MARCHE		UMBRIA		
		P1	P2	P3	P4	P5	P6	P7	
Service num.	Standard Activities								
	3. SME feedback activities								
13	SME consultations and feedback cases	X	X	X	X	X	X	X	

Subcontracting costs are not foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME.

The staff involved in this WP3 activity has already developed skills in promoting SME feedback activities, collecting opinions of client participating to SME consultation and/or difficulties resulting from EU legislation or policies experienced by companies in the Single Market and working with third countries; submitting data collected to SME Feedback Database and/or redirect to SOLVIT.

Name of Network partner	Role	Special skills	Main tasks	Type of Staff needed
P1 PF	Participating in the SMEs - feedback activities	Communicative, organizational, collection of SME's opinion/cases	T3.3	Senior Staff
P2 CT	Participating in the SMEs- feedback activities	Communicative, organizational, collection of SME's opinion/cases	T3.3	Expert
P3 EUC	Participating in the SMEs- feedback activities	Communicative, organizational, collection of SME's opinion/cases	T3.3	Senior staff;
P4 AP	Participating in the SMEs- feedback activities	Communicative, organizational, collection of SME's opinion/cases	T3.3	Senior Staff
P5 CDO - WP Leader	SME2EU SME Feedback Contact Persons; Participating in the SMEs- feedback activities	Networking and Leadership; Communicative, organizational, collection of SME's opinion/cases	T3.1, T3.2, T3.3	Senior staff; Expert
P6 CEU	Participating in the SMEs- feedback activities	Communicative, organizational, collection of SME's opinion/cases	T3.3	Senior Staff; Expert

3.5 . Deliverables

D3.1 Rolling plan of Consultations launched by the European Commission and to be promoted by SME2EU Partners, updated every 2 months in the regular Senior Council meetings.

3.6 Outputs, outcomes and impact

The proposed 2-year targets for outputs are:

Indicators	P1	P2	P3	P4	P5	P6	P7	SUM
Outputs								
DI.10 # Clients in feed-back related actions	26	10	8	15	10	4	0	73

Outcomes: Not applicable according to the definition provided by the Guide for Applicants

Impact:

Quality Improvement: SME2EU Partners contribute to improving the business environment in which SMEs operate, providing them with the revised EU politics/legislation/initiatives implemented by the EC based the feedback collected through SME feedback activities.

The SME2EU Partners will disseminate, as achievements for SME feedback activities, the results on EU policy improvements and changes to SMEs and stakeholders as soon as these results will be available after the analysis by the EC DG concerned.

The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

WP 4. NOT APPLICABLE

WP 5. **Promotion of the Network's services and communication activities (between 10% and 20% of total FTE's)**

5.1 Specific objective(s) of the activity

SME2EU Consortium will promote EEN services with the following objectives:

- to increase the visibility of the EEN as provider of high quality advisory services to support SME competitiveness and innovation, in the three regions involved, to attract and support new or potential new clients
- to spread awareness of the SME2EU Consortium identity and mission, clearly identifying activities and services provided by each partner organisation to clients, highlighting the Partners and their role in the SME2EU Consortium area

Particular attention will be devoted to provide customized information to all target groups.

5.2 Target group/audience

According to the Implementation Strategy Chapter 2, the SME2EU Consortium targets for communication activities are:

– Communication to companies: **Direct beneficiaries**

All companies, mainly **SMEs**, existing, new and potential clients

– Communication to and through Stakeholders: **Indirect Beneficiaries**

Public Authorities; Research Institutes, Public and private providers of support services to SMEs, Sectorial Business Association, other EU networks and all relevant stakeholders.

It is important to note that stakeholders can be considered direct beneficiaries when they directly use EEN information/advisory services and indirect when they operate as intermediaries (of the Network) to reach target SMEs.

5.3 Description of work, methodology and tools

All SME2EU Consortium Partners already have their own communication tools to reach their target groups. Their participation in the EEN has given them the opportunity to enhance these tools, so they can provide more complete and customized information to businesses and so be more effective.

This WP will be involve the following tasks:

Task 5.1 – Management of SME2EU Consortium, Partner and National web sites

The SME2EU Consortium will develop and implement a web site that represents the main common tool to communicate with the audience. The web site graphic design will be consistent with the EEN's branding rules, guidelines and identity. It is structured as a promotional and information tool thus enhancing the visibility of the EEN in the Consortium area and beyond, providing users with updated and reliable information about European Union topics and EEN services and activities. The web site will share events, initiatives, newsletters, success stories and good practices of the Partners.

Clients visiting it will find a link to the Partnering Opportunities Database where they can search for business, technology and research profiles of their interest.

POD profile abstracts translated into Italian by the partners for their own use will also be posted on the Consortium web site, as further described in WP2.

The web site will show links to the most relevant EU portals, to the EEN national web site, to each SME2EU Consortium Partner's web site and to their customized business pages of the social networks, and to the innovation and creativity blog hosted by P7 but which also publishes articles by users: <http://lasoluzioneinnovativachenonho.com/>

The web site platform will be adapted to new technologies that may evolve during the six years of the project. P4 will manage the SME2EU Consortium web site and will handle common e-mail address, monitoring enquires daily and forwarding them to the most appropriate SME2EU Consortium Partner.

In addition to the common web site, each Partner will be responsible for maintaining at least one web page on EEN activities and services of their own HO web sites, ensuring compliance with EEN's branding rules and guidelines, clearly identifying the EEN and SME2EU Consortium name, logo and services.

Analysis of the statistical reports will allow monitoring of users' interest on the site's contents based on data about visits, subscribers and downloaded articles.

An EASME feedback questionnaire will be sent to the targets yearly to monitor client satisfaction.

Moreover each SME2EU Consortium Partner will contribute to the updating of the EEN National web site by providing articles, newsletters, info and documentation about their own initiatives, events, activities and success stories.

As described in Chapter 6 of the Implementation Strategy, a common national EEN Press Expert will be responsible for the National Communication strategy on different media tools, including the National website.

Task 5.2. - Social media management

In order to quickly and effectively communicate activities, services and initiatives, the SME2EU Consortium Partners will make use of social media which represent a flexible and adaptable promotion channel, allowing them to reach both a wide audience and specific target groups. The SME2EU Consortium Partners will communicate EU contents through social networks (Facebook, Linked-in, Twitter, Google+, YouTube, etc.) and will use them to deliver EEN services too.

According to specific EEN services (WP.1), the SME2EU Consortium Partners will identify specific profiles thus building business communities where EEN clients can take part, dialogue and share experiences, success stories, and contents. Each Partner is committed to widely promote the links to social networks, fora, communities and/or Apps in order to build closer relationships with clients.

Such channels can be used to spread information on European, national and local promotional campaigns in which SME2EU Consortium and/or Partner organisations participate.

SME2EU Consortium Partners will regularly monitor effectiveness of social media activities to collect data on social network penetration (Facebook fans, Twitter followers, LinkedIn links, Google+ members, YouTube views etc.).

Web marketing tools (SEM, SEO, SMM, SMO, DEM ..) may be exploited too, according to each Partner's strategies: in particular Search Engine Optimisation (SEO) may allow SME2EU website to be visible and to achieve an higher ranking in search engine results pages. Search Engine Marketing (SEM) and Social Media Optimization (SMO) may be exploited by each Consortium partner to promote EEN special events/promotional campaigns and/or to match specific target audience. On the other hand, Direct E-mail marketing (DEM) may be used by SME2EU partners to reach potential or current clients, to enhance relationship and to build loyalty, trust and EEN brand awareness.

Task 5.3 – Newsletters, targeted mailings, business/tender alerts and brochures

SME2EU Consortium Partners will contribute to promoting the Network brand and its services, through own **newsletters** which will be available in the SME2EU Consortium and Partners web sites. Partners' Newsletters will be sent by e-mail to their own client database or to a specific audience according to the contents.

The SME2EU Consortium Partners will make use of **targeted mailings and business/tender alerts** according to the audience to be reached.

The SME2EU Consortium Partners will produce the SME2EU Consortium leaflet and other specific promotional **brochures** available on line and in paper format illustrating the EEN services and local contact points.

An EASME feedback questionnaire will be yearly sent to the targets to monitor clients' satisfaction.

Task 5.4 – Success Stories promoted

The success stories represent a useful way to promote the Network by providing concrete examples of how the Network assists small and medium-sized enterprises in their processes of internationalization and innovation (see the process of selection and follow up in the IS Chapter 6).

Task 5.5 – Cooperation with local and regional stakeholders

The cooperation will be handled according to Chapter 7 of the Implementation Strategy and to the Communication Objectives described in WP5.1.

Stakeholders include all relevant actors which can contribute, as intermediaries, to increase network activities/services impact in the SME2EU Consortium area. The SME2EU Consortium will manage the Communication with Stakeholders through personal relationships, meetings, round tables, direct mailings, conference calls, cloud applications.

Stakeholder involvement enhances visibility of the network at local/regional level and it allows improvement of the access and proximity of the integrated services provided to SMEs.

This cooperation may be implemented through informal or formalized cooperation agreements aimed at ensuring a dialogue, seeking complementarities, avoiding overlaps, exchanging information, best practices and success stories, extending the number of access points in the territory ensuring mutual signposting and assistance in promotional activities and in joint initiatives and events management. Involvement of intermediaries may be useful to spread clients' cooperation profiles at a wider level through stakeholders' web sites through use of the Pod stakeholder widget for commercial, research and technology profiles.

Cooperation with Stakeholders will be monitored by the Partners through EEN client satisfaction questionnaires.

5.4 Role of each partner, need to subcontract if any, subcontractor

All Partners will actively contribute to the network promotion, using skilled staff as showed in the table below. P4 will be responsible for the realization and management of the SME2EU web site while all Partners will give their contribution in the regular updating.

Summary of activities provided by each partner:

Service num.	SME2EU Partners							
	TOSCANA			MARCHE		UMBRIA		
	P1	P2	P3	P4	P5	P6	P7	
	Standard Activities							
16	5. Promotion of Network's services and communication activities							
	X	X	X	X	X	X	X	X

Subcontracting costs foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME are:

- Pro quota EEN Italian Press Officer (all partners)
- Pro quota EEN Italian Web site National (all partners)

The above mentioned subcontracted activities are needed by all the Italian EEN partners for national communication activities and will be assured quality control of them at national level.

According to the art. 5 D of the EASME Model EEN SGA COSME the costs necessary to concerned partners for

- Web agency to handle the SME2EU Consortium website hosting, realization, platform technical management (P4);
- Web platform to handle EEN newsletters and/or web marketing activities, such as SEM, SEO, SMO (P4);
- Graphic and printing of promotional material (all partners)

have been inserted in the budget in the cost category named "Costs of other services".

Name of Network partner	Role	Special skills	Main tasks	Type of staff needed
P1 PF	Active Promoter	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	Senior Staff
P2 CT	Active Promoter	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	Experts
P3 EUC	Active Promoter	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	Senior staff; Junior staff;
P4 AP – WP leader	SME2EU Consortium web site Manager	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	EEN project manager Senior Staff

P5 CDO	Active Promoter	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	Senior staff; Expert
P6 CEU	Active Promoter	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	Experts
P7 SVIL	Active Promoter	Communication & Promotion; Web/digital devices management; networking relationship abilities	T5.1, T5.2, T5.3, T5.4	Senior specialists; Expert

5.5 Deliverables

The following deliverables will be produced:

D5.1 SME2EU Consortium web site publication. Within 3 months from the beginning of the project.

D5.2 EEN website section of Consortium partners publication. Within 3 months from the beginning of the project.

D5.3 Social media Implementation report. Containing social media plan and implementation report. First published on month 3 and updated on month 12 and 24.

D5.4 List of newsletters edited and typologies of targeted mailing or business alert sent, updated twice a year.

D5.5 List of services/activities shared with stakeholders divided for typologies (Advices, Cross Border Partnering and Feedback), updated twice a year.

D5.6 List of Success stories of the Consortium, updated twice a year.

5.6 Outputs, outcomes and impact

The proposed 2-year targets for outputs are:

DI 13 total sum is 75600. In particular:

DI	Outputs	Partners							
		P1	P2	P3	P4	P5	P6	P7	SUM
DI 13	n° of Partners' EEN section/ websites visitors	5000	12800	10700	13000	800	200	n.a	42500
	n° of social network members (Facebook fans, Twitter followers, LinkedIn links, Google+ members, YouTube visitors)	200	200	750	2500	300	300	350	4600
	n° of Newsletters Subscribers	6000	5600	2500	6000	1200	2000	200	23500

	n° of targets receiving Mailings	n.a	300	1000	2000 (n° included in n° of Newsletters Subscribers)	1200	1500	890	6890
	n° of Alert Subscribers	n.a	20	50	20	n.a	20	n.a	110
DI 14	n° of Cooperation with local stakeholders	6	6	6	6	4	3	4	35
	Outcomes	Not applicable according to the definition provided by the Guide for Applicants							

Impact: SME2EU Consortium Partners will regularly collect, monitor, measure and report in IMT evidence and data on network services promotion and communication activities.

The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

Measurement: statistical analysis on websites and social media users, mailings sent, newsletters and alerts subscribers may give a realistic picture of SME2EU Consortium services awareness among the community. The measurements of the 5 impact indicators will also be realized through the analysis of the qualitative EASME questionnaire.

WP 6. Network building and reinforcing the Network (between 10% and 20% of total FTE's)

6.1 Specific objective(s) of the activity

The activity of Network building and reinforcing the Network aims at ensuring a proactive interaction among EEN Partners in order to increase the quality and success of the Network as a whole. This objective will be made possible with an adequate participation of SME2EU Consortium staff to the EEN initiatives at national and international levels.

SME2EU Consortium's specific objectives will be:

- Support for the organisation and participation to national EEN meetings, to which each Partner participates with at least one staff member;
- Participation in Annual Conferences of the EEN;
- Participation in staff exchanges or receiving mentoring within the dedicated mentoring scheme;
- Participation in meetings of EEN Working Groups or Steering Groups;
- Participation in Sector Group meetings and activities;
- Exchange and use of good practices, knowledge and/or tools; contributing own expertise for strengthening the Network as a whole;
- Maintain constant links with other Network Partners and extend mutual know-how;
- Join regional, multi-regional, national and transnational activities of Network Partners (B2B, info days, workshops, etc.);
- Participation in Network training activities;

Monitoring Network results.

6.2 Target group/audience

SME2EU Consortium's target groups are:

- EEN Partners at European, national and SME2EU Consortium level
- European Commission and EASME

All direct and indirect beneficiaries of standard Network activities (see IS Chapter 2).

6.3 Description of work, methodology and tools

All SME2EU Consortium Partners will actively participate in relevant EEN activities and will strengthen collaborations with other Network Partners, assuring adequate allocation of resources for their participation.

To implement and foster collaboration with Network Partners, the following tasks will be implemented:

Task 6.1 Participation in Network meetings

- The EEN Annual Conference will be attended by all SME2EU Consortium Partners in order to meet other network members, to exchange best practices and experiences, and to plan possible joint activities for target beneficiaries;
- Each SME2EU Consortium Partner will participate at the EEN national meetings, and contribute to their organization;
- Each SME2EU Consortium Partner will participate in Consortium Meetings every two months, to be held physically and/or through electronic means.

Task 6.2 Participation in Network Groups

The SME2EU Consortium will participate in National Working Groups that will be created by the Italian EEN on relevant topics such as Communications, in which P1 and P4 will participate.

As the Coordinator, P1, will participate in the National Steering Group activities. One national representative will be selected, among all Italian Consortia, for the European Steering Group.

Some SME2EU Consortium Partners will participate in the following Thematic Sector Groups: P1 Agrofood, P3 Services/Retail and Tourism/Cultural Heritage, P7 Environment.

Task 6.3 Maintain constant links with other Network Partners and extend mutual know-how / Answer Network enquires

To strengthen the link and collaboration with other Network Partners SME2EU Consortium will promote the diffusion of its expertise and initiatives towards other National consortia or international Partners, through direct e-mail, Merlin forums (Country and Sector) and social networks.

All SME2EU Consortium Partners will be involved in producing and sharing Good Practices internally and at national and European level in order to facilitate their adoption.

The SME2EU Consortium will ensure that replies are sent to the enquiries from Network Partners (through Merlin Forum or directly received) looking for information on behalf of their clients.

Task 6.4 Joint regional, multi-regional, national and transnational activities with Networks Partners

In order to better exploit the opportunities and competences of the network, some SME2EU Consortium Partners will jointly carry out activities with other Network Partners, both Italian and international.

These activities will include co-organisation of information days, Brokerage Events, Company Missions (see WP1 and WP2), and participation in events as speaker, trainer, chairman, expert, or other.

Task 6.5 Participation in Network training/staff exchange/mentoring activities

To ensure and maintain high quality service levels, all SME2EU Partners will participate in the EASME training programme, including on-site (classroom) and on-line (e-learning) centralized and decentralized training events and/or SME2EU Consortium Training.

Particular attention will be paid to the training of any new staff that may join the project.

P2 will also take part in staff exchange programmes and mentoring schemes.

Task 6.6 Substantial contributions to the operation and quality of the Network

Some SME2EU Consortium Partners, during the life cycle of SME2EU Project, could take on a more demanding role relative to activities such as Chairing Sector Groups and/or working groups, Provision of (advanced) trainings.

SME2EU Consortium Partners will participate in EU-driven additional activities launched by the European Commission or EASME to:

- Adjust the EEN's existing services to changing political priorities at EU level
- Add new services to the mix of EEN activities to respond to changing political priorities at EU level

Carry out larger scale activities in cooperation with other EU programmes not specified in this call.

6.4 Role of each partner, need to subcontract if any, subcontractor

All SME2EU Consortium Partners must provide adequate resources for participating in EEN Network building and reinforcing activities.

Summary of activities provided by each partner:

		SME2EU Partners							
		TOSCANA			MARCHE		UMBRIA		
		P1	P2	P3	P4	P5	P6	P7	
		Standard Activities							
Service num.	6. Network building and reinforcing the Network								
17		X	X	X	X	X	X	X	X

Subcontracting costs are not foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME.

According to the art. 5 D of the EASME Model EEN SGA COSME the costs necessary to concerned partners for realizing

- Webconference Platform for consortium and national EEN meetings;
- Participation fee - Enterprise Europe Network Annual Conference;
- Networking events (room and technical audio/video equipment renting, catering, interpreters, transport for participants, speakers fees including their travels and subsistence allowances etc ...)

have been inserted in the budget in the cost category named "Costs of other services".

Name of Network Partner	Role	Special skills	Main tasks	Type of staff needed
P1 PF	Active Participant	Networking ability, Team Working	T6.1,T6.2,T6.3, T6.5, T6.6	Senior Staff
P2 CT- WP Leader	Active Participant	Networking ability, Team Working, Team Leader	T6.1,T6.3,T6.4, T6.5,T6.6	Experts
P3 EUC	Active Participant	Networking ability, Team Working	T6.1,T6.2,T6.3, T6.5,T6.6	Senior staff; Junior staff;
P4 AP	Active Participant	Networking ability, Team Working	T6.1,T6.2,T6.3, T6.5,T6.6	EEN project manager
P5 CDO	Active Participant	Networking ability, Team Working	T6.1,T6.3,T6.4, T6.5,T6.6	Senior staff
P6 CEU	Active Participant;	Networking ability, Team Working	T6.1,T6.3, T6.5 T6.6	Senior staff; Expert
P7 SVIL	Active Participant	Networking ability, Team Working	T6.1,T6.2, T6.3,T6.4,T6.5, T6.6	Senior specialists; Expert

6.5 . Deliverables

D 6.1 Rolling plan (list) of Network meetings (Annual, National and Consortium) including details of participating Consortium staff, updated twice a year.

D 6.2 List of Groups participated in (Working groups, Steering Group and Sector group), events to be attended, including meetings and other activities, together with participating Consortium staff, updated 6

times a year during SME2EU Consortium meetings.

D 6.3 List of regional, multi-regional, national and transnational activities co-organised within SME2EU Consortium and intra-consortia EEN partners, updated 6 times a year during SME2EU Consortium meetings.

D 6.4 List of Network training activities with involved staff updated twice a year.

The 4 deliverables will be grouped in the SME2EU Consortium Networking Plan. At the beginning of the project the types and numbers of expected activities together with the minimum target will be detailed and included as Initial Networking plan.

During the project implementation phase individual deviations will be analysed, remarked and discussed, to ensure the achievement of the project objectives.

6.6 Outputs, outcomes and impact

DI15 Answered enquiries from Network Partners. Summing the number of answers to questions posted on Merlin Forums and direct enquiries sent by Network Partners through other means.

DI16 Active contributions to Network activities include

- Active contributions to Network activities (1 Annual Conference, 2 National meetings/year; 2 National Steering Advisory Group and 2 WG meetings, Sector Groups Meetings)
- Active contributions to Consortia activities (6 SME2EU Consortium meetings/year plus 1 Training)
- Contributions to good practices

The proposed 2-year targets for these outputs are:

Indicators	P1	P2	P3	P4	P5	P6	P7	SUM
Outputs								
DI15 Answered enquiries from Network Partners	30	22	30	22	22	22	54	202
DI16 Active contributions to Network activities	32	20	32	28	19	19	23	173
Outcomes	Not applicable according to the definition provided by the Guide for Applicants							

Impact: the correct implementation of this WP's activities is fundamental to optimize the opportunities offered to direct and indirect Clients of the whole EEN network. Actively participating in meetings and training activities will facilitate the diffusion of correct, timely and effective information. Sharing of strategies, good practices and expertise will lead to a more widespread and useful interaction of network partners with businesses and other types of clients. Co-organizing events will boost their effectiveness and participation.

This WP will therefore have an indirect impact on all 5 indicators that the network aims at achieving: market improvement, cost savings, job creation or maintenance, quality improvement and innovation / competitiveness. The impact will be measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40).

Measurement: measuring the 5 impact indicators will be made through the EASME qualitative questionnaire or the questionnaires collected relative to events as better described in WP2.

Project Management (max 5% of total FTE)**1 Governance body and project management organisation chart**

The SME2EU Consortium Management will have a very light structure to coordinate the seven Partners involved in the proposal (see IS Chapter 5).

In particular the governance body "Senior Council" (SC) will be constituted by P1 with the Contact Coordinator for the Project and 1 Senior staff for Project Management, and by 1 Senior staff acting as Program Manager Officer (PMO) for each Partner (in case the responsibility of activities is divided between more persons beside the PMO, if requested, other senior staff per partner will be admitted to join the SC meetings, in any case without vote right). Each PMO will be responsible of its HO leading WP,; acting also as WP Leader: P2 WP6 Leader, P3 WP4 Leader, P4 WP5 Leader, P5 WP3 Leader, P6 WP 1 Leader, P7 WP 2 Leader.

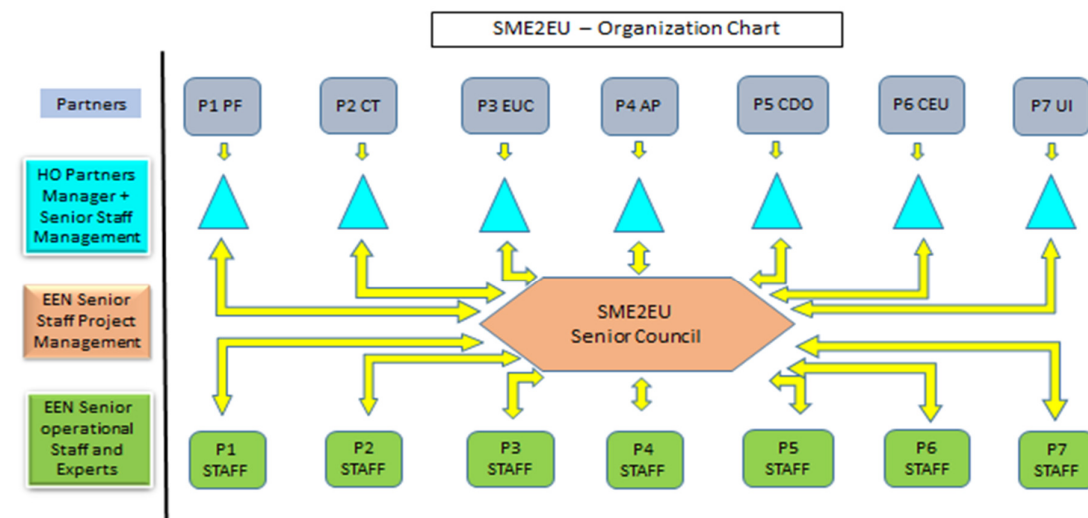
Each PMO WP Leader will coordinate and prepare a concrete plan of objectives and activities to be implemented by each Partners involved, with deliverables, outputs, outcomes, impact, human resources and costs. Each WP Leader will coordinate the Partners to implement the WP.

Each Partners will define an internal plan to implement each WP. Each SME2EU Consortium Partners will manage the project at Host Organization (HO) level together with its internal Manager. All the HO internal Manager will be involved and updated by its Senior staff for Project Management in all phases of the Project life cycle and in particular before the 6 meetings to address the SC strategies and/or priorities to be followed according to local and/or regional policies agreed with Regional Authorities or Stakeholders.

The SC will meet via web conference every two months for 6 minimum number of Consortium meetings every year in order to discuss the common strategy and actions for implementing the project, monitoring the working in progress of each WP through analysis and reporting made by the WP Leader that coordinate the other partners to implement the WP. The P1 Coordinator will produce a synthetic report at the end of every meeting to sum up important issues discussed and decisions assumed.

SME2EU Consortium will produce, at the end of every year, a summary yearly activity report addressed to the HO internal Managers containing the EEN activities and the goals reached.

The communication between Partners will be managed mainly through e-mail and through Intranet Tool made available by EASME for any contractual issues.



2 Description of work - follow-up and quality control system - milestones

Task PM.1: SME2EU Partners internal Project Management

The Project Management will be implemented internally to each HO by each SME2EU Partner through its Senior staff for Project Management according to its HO Managers directives.

Tasks PM.2: SME2EU Partners WP Management

Each Partners WP Leaders will coordinate the other Partners involved in the WP and plan precisely and concretely the objectives and activities to be implemented by each Partners involved, the deliverables, the outputs, the outcomes, the impact of the WP, the human resources and costs necessary. Each WP Leader will coordinate the other Partners to implement the WP and will monitor the working in progress of the WP implementation to verify the activities realised versus the planned and define eventual actions to recover and avoid risk of performance.

Task PM.3: SME2EU Consortium global Project Management

The P1 Coordinator will organise meetings every two months via web conference for 6 minimum number of consortium meetings every year in order to discuss the common strategy and actions for implementing the project. The P1 Coordinator will produce a synthetic report at the end of every meeting to sum up important issues discussed and decisions assumed.

Task PM.4: SME2EU Consortium Monitoring and Reporting

During the 6 yearly meetings P1 Coordinator and Partners will analyse the work in progress of the project, monitoring regularly:

- The outputs, outcomes, achievements to be performed by the SME2EU Consortium Partners;
- The participation in Network activities and the Feedback from other Network events;
- The implementation of the Communication strategy.

The SME2EU Consortium for Monitoring and Reporting Tasks will use:

- a common internal management tool as described in the Implementation Strategy Chapter 8 and 9
- the EASME monitoring system that will be put in place. In particular:
 - a) after the first six months of the project the Partners will participate to the EASME inception survey based on standard checklist
 - b) after 12 and 24 months of the project the Partners will submit the Quantitative report on 16 data items and the self-assessment of the SME2EU Consortium;
 - c) after 18 months the Partners will submit the Summary of the conclusions from completed questionnaires on the extent to which the expectations for months 1 to 6 have been attained;
 - d) after 24 months SME2EU Consortium will submit a technical implementation report formed by three parts: Quantitative Report, Narrative Report, Summary of the conclusions from the completed questionnaires on the extent to which the expectations for months 7 to 12 have been attained.

Task PM.5: Quality management – Clients satisfaction

Quality control system will be implemented through feedback gathered from clients who have received Network services or attended events, to measure their satisfaction. The Code of Conduct will be signed and put into practice by all the SME2EU Partners.

Task PM.6: EEN Follow up activities

The follow up will be realised by the SME2EU Partners to collect the Achievement of EEN activities.

Task PM.7: Impact measurement

The impact about the positive effects of the Network's activities and services on businesses in terms of results (products, services, market shares, etc.), efficiency (cost reduction), employment (job creation or preservation), quality improvement (goods or services, client satisfaction, etc.) or innovation will be

measured by questionnaires submitted to clients as stated in the Guide for Applicants (pag. 40). The impact will be

- 1) on the expected impact of the services delivered by the Network;
- 2) expectations attained (submitted to clients approximately one year after the service has been delivered).

3 Role of each partner

The SME2EU Coordinator is P1 while the Partners are Leaders of the following EEN activities:

P1 Coordinator: WP Project Management

P2: Leader of WP 6 EEN activities

P3: Leader of WP 4 EEN activities

P4: Leader of WP 5 EEN activities

P5: Leader of WP 3 EEN activities

P6: Leader of WP 1 EEN activities

P7: Leader of WP 2 EEN activities

Subcontracting costs are not foreseen by partners accordingly to the art. 5 B and 11.1 of EASME Model EEN SGA COSME.

According to the art. 5 D of the EASME Model EEN SGA COSME the costs necessary to P1 for the service of hosting Internal Management Tool (IMT) (installing, upgrading, taking backup,..) have been inserted in the budget in the cost category named "Costs of other services".

Name of Network partner	Role	Special skills	Main tasks	Type of staff needed
P1 PF	Coordinator; IMT Responsible	Project Management, Leadership,	T.PM.1,T.PM.2,T.PM.3, T.PM.4,T.PM.5,T.PM.6, T.PM.7	Senior staff Contact Coordinator; Senior staff Project Manager; Senior staff
P2 CT	WP6 Leader	Project Management, Leadership,	T.PM.1,T.PM.2,T.PM.4 T.PM.5,T.PM.6,T.PM.7	Senior staff
P3 EUC	WP4 Leader	Project Management Leadership,	T.PM.1,T.PM.2,T.PM.4 T.PM.5,T.PM.6,T.PM.7	Senior staff; Junior staff;
P4 AP	WP5 Leader; web site Host and Manager	Project Management; Leadership,	T.PM.1,T.PM.2,T.PM.4 T.PM.5,T.PM.6,T.PM.7	EEN project manager
P5 CDO	WP3 Leader	Project Management , Leadership,	T.PM.1,T.PM.2,T.PM.4 T.PM.5,T.PM.6,T.PM.7	Senior staff;
P6 CEU	WP1 Leader	Project Management , Leadership,	T.PM.1,T.PM.2,T.PM.4 T.PM.5,T.PM.6,T.PM.7	Senior staff
P7 SVIL	WP2 Leader	Project Management , Leadership,	T.PM.1,T.PM.2,T.PM.4 T.PM.5,T.PM.6,T.PM.7	Senior specialists; Expert

4 . Deliverables

DPM.1 List of internal meetings of each HO, provided by each partner, updated 6 times a year.

DPM.2 WP Plans, provided by each leader, updated 6 times a year.

DPM.3 Synthetic Reports of Senior council meetings provided by P1, updated 6 times a year.

DPM.4a Inception Survey, provided by each partner according to EASME date indication.

DPM.4b Quantitative report, provided by each partner according to EASME date indication.

DPM.4c Summary of the conclusions, provided by each partner according to EASME date indication

DPM.4d Narrative report, provided by each partner according to EASME date indication.

DPM.5 Code of Conduct signature, signed by each partner within 3months from the beginning of the project.

DPM.6: Achievement Form, provided by each partner after the achievement is acquired.

DPM.7: EASME 2 questionnaires, provided by each partner according to EASME date indication.



European Commission | Executive Agency for Small and Medium-sized Enterprises

Proposal identification number (to be inserted by the Executive Agency for Small and Medium-sized Enterprises - EASME)

Consultation of Enterprise Europe Network partners on the work programme for 2015-2016 Cosme activities

Call Identifier: COSME-2014-2.7

Association

Detailed budget

Full title of the proposal	Small and Medium Enterprises To European Union
Acronym of the proposal	SME2EU
Number of partners	7
Proposal Cover Sheet	
<p>Instructions on how to fill in this budget form can be found in the sheet "Reference Numbers". Please, read also carefully the Terms of reference for further details on costs eligibility.</p>	

Executive Agency for Small and Medium-sized Enterprises (EASME)

Table 1: Cost summary in EUR

Participant		Eligible Direct costs			Eligible Indirect Costs	Total Eligible Costs	
Participant No. ¹	Organisation short name ²	(A) Direct personel costs	(B) Other direct costs		(C) Direct costs of subcontracting ⁴	(D) Indirect costs ⁵	(E) Total estimated eligible costs (A+B+C+D)
			Travel costs and subsistence allowances for personnel ³	Costs of other goods and services			
1	PF	382 610	10 000	21 641	3 000	103 563	520 814
2	CT	250 914	10 430	13 557	3 000	68 725	346 626
3	EUC	250 608	6 000	19 099	1 993	68 927	346 626
4	AP	244 609	4 800	14 995	1 912	66 101	332 417
5	CDO	96 103	1 620	3 591	895	25 329	127 538
6	CEU	66 557	4 400	360	515	17 829	89 661
7	SVIL	123 674	5 094	724	940	32 373	162 805
8		0	0	0	0	0	0
9		0	0	0	0	0	0
10		0	0	0	0	0	0
11		0	0	0	0	0	0
12		0	0	0	0	0	0
13		0	0	0	0	0	0
14		0	0	0	0	0	0
15		0	0	0	0	0	0
16		0	0	0	0	0	0
17		0	0	0	0	0	0
18		0	0	0	0	0	0
19		0	0	0	0	0	0
20		0	0	0	0	0	0
21		0	0	0	0	0	0
22		0	0	0	0	0	0
23		0	0	0	0	0	0
24		0	0	0	0	0	0
25		0	0	0	0	0	0
TOTAL		1.415.075	42.344	73.967	12.255	382 846	1 926 487

SME2EU

Executive Agency for Small and Medium-sized Enterprises (EASME)

Table 2: Revenue summary in EUR

Participant No.	Organisation short name	(I) Requested Grant	(J) Applicants' own resources	(K) Receipts ⁶	(L) Total revenue (I+J+K)
1	PF	312.488	208.325	0	520.814
2	CT	207.976	138.651	0	346.626
3	EUC	207.976	138.651	0	346.626
4	AP	199.450	132.967	0	332.417
5	CDO	76.523	51.015	0	127.538
6	CEU	53.797	35.865	0	89.661
7	SVIL	97.683	65.122	0	162.805
8					0
9					0
10					0
11					0
12					0
13					0
14					0
15					0
16					0
17					0
18					0
19					0
20					0
21					0
22					0
23					0
24					0
25					0
TOTAL		1.155.893	770.595	0	1.926.488

SME2EU

<i>Reference numbers</i>	
1. Participant number	<p>The number allocated by the co-ordinator to the participants for this proposal. The co-ordinator of a proposal shall always be participant number one.</p> <p>➡ Applicants shall make sure that the participant number is consistent in all application forms.</p>
2. Organisation Short Name	<p>The official short name of the organisation shall be indicated. This cannot be more than 20 characters long.</p> <p>If an organisation has no official short name, applicants shall choose one for identification of the organisation within this proposal. The same short name must be used in all parts of the proposal including the Annexes.</p>
3. Travel costs and subsistence allowances for personnel	<p>This cost category contains costs for staff of the participant related to travel and subsistence allowances. The number of travels is calculated per person per meeting. E.g. if one person travels to one meeting, you should indicate 1 travel here, independently of the duration of the meeting. If 2 persons travel to the same meeting, or if 1 person travels to 2 different meetings, you would indicate a 2 here.</p>
4. Direct costs of subcontracting	<p>Applicants shall indicate the name of the subcontractor, if already known, or TBD (to be determined), the country, and a short, but clear description of the work to be undertaken.</p> <p>The tasks for subcontractors should be described in sufficient detail in the respective Work Package description of the work programme</p>
5. Indirect eligible costs ("overheads")	<p>Indirect costs (overheads) are eligible for a flat-rate funding of 25 % of the total amount of eligible direct costs except direct subcontracting costs. The amount is calculated automatically.</p>
6. Receipts	<p>According to article 4.3.3 of the specific grant agreement.</p>
7. Participant Role	<p>Indication of the role of each participant, as defined by the consortium for this proposal. The two options are CC and CP.</p> <p>CC stands for Consortium Co-ordinator, CP stands for Consortium Partner.</p>
8. Category of staff to work on the project	<p>Applicants shall identify each category of staff in a clear and unambiguous manner.</p>

Executive Agency for Small and Medium-sized Enterprises (EASME)

Call Identifier: COSME-2014-2.7

Data Coordinator		SME2EU			
Organisation short name	PF	Participant No	1	Participant Role ⁷	CC
Direct staff costs					
Name of the staff and category (e.g. senior expert, expert, junior expert, etc.) ⁸	Hours on Project (A)	Hourly Rate (B)	Direct Staff costs (AxB)		
Giacinto Bosco- Senior Staff Contact Coordinator	1.536	38,73	59.489,28		
Paola Lesmo-Senior Staff Project Management	2.180	35,79	78.022,20		
Margherita Lella-Senior Staff	1.898	24,59	46.671,82		
Laura Tettamanti-Senior Staff	1.898	24,40	46.311,20		
Tullio Parronchi-Senior Staff	2.020	30,92	62.458,40		
Luca Ribechini-Senior staff	1.812	26,98	48.887,76		
Duccio Negroni- Senior Staff	1.982	20,57	40.769,74		
			0,00		
			0,00		
			0,00		
			0,00		
			0,00		
			0,00		
Total	13.326		382.610,40		
Travel costs and subsistence allowances for personnel					
	Number of travels	Average travel and subsistence costs	Total [EUR]		
International travels	10	700	7.000		
National travels	12	250	3.000		
			Subtotal:	10.000	
Costs of other services					
Description	Work package no.	Total [EUR]			
Logistic of local and regional events (room and technical audio/video equipment renting, catering, interpreters, transport for participants, speakers fees including their travels and subsistence allowances etc ...)	1	9.000			
Logistic of brokerage event and company mission (room and technical audio/video equipment renting, catering, interpreters, transport for participants,...)	2	2.600			
Communication and Promotional Material (graphic designer, printing, purchase..)	5	1.641			
Webconference Platform for consortium and national EEN meetings	6	1.000			
Participation fee - Enterprise Europe Network Annual Conference	6	400			
Logistic of EEN Networking events (room and technical audio/video equipment renting, catering, interpreters, transport for participants, speakers fees including their travels and subsistence allowances etc ...)	6	4.000			
Service of hosting Internal Management Tool (IMT) (installing, upgrading, taking backup,...)	7	3.000			
		Subtotal:	21.641		

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Data Coordinator			SME2EU	
Organisation short name	PF	Participant No	1	Participant Role
CC				
Subcontracting				
Name of sub-contractor	Country	Description	Work package no.	Total [EUR]
To be defined	Italy	Pro quota EEN Italian Press Officer	5	2.100
To be defined	Italy	Pro quota EEN Italian Web site	5	900
Subtotal:				3.000
Total eligible direct costs:				417.251
Total eligible costs:				520.814

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Executive Agency for Small and Medium-sized Enterprises (EASME)

Call Identifier: COSME-2014-2.7

Data Partner 2		SME2EU			
Organisation short name	CT	Participant No	2	Participant Role ⁷	CP
Direct staff costs					
Name of the staff and category (e.g. senior expert, expert, junior expert, etc.) ⁸		Hours on Project (A)	Hourly Rate (B)	Direct Staff costs (AxB)	
Luisa Ortu (Senior Project Manager)		1.230	46,88	57.662,40	
Giada Mennuti (Senior Staff)		1.230	46,88	57.662,40	
Nicola Mione (Senior Staff)		316	44,27	13.989,32	
Paolo Vecchi (Junior staff)		1.068	27,03	28.868,04	
Silvia Ramondetta (Expert)		916	33,56	30.740,96	
Alessandra Gallo (Expert)		1.268	23,67	30.008,83	
Sara Pucci (Junior staff)		1.373	23,29	31.981,83	
				0,00	
				0,00	
				0,00	
				0,00	
				0,00	
				0,00	
Total		7.401		250.913,77	
Travel costs and subsistence allowances for personnel					
	Number of travels	Average travel and subsistence costs		Total [EUR]	
International travels	13	470		6.110	
National travels	160	27		4.320	
				Subtotal:	10.430
Costs of other services					
Description		Work package no.	Total [EUR]		
Speaker fees (including travels and subsistence allowances)		1	2.500		
Logistic of local and regional events (room and equipment renting, catering, interpreters, transport for participants,...)		1	5.620		
Logistic of brokerage event and company mission (room and equipment renting, stands, catering, interpreters, transport for participants,...)		2	3.000		
Communication and Promotional Material (graphic designer, printing, purchase..)		5	2.000		
Annual Conference Fee		6	437		
				Subtotal:	13.557
Data Partner 2		SME2EU			
Organisation short name	CT	Participant No	2	Participant Role	CP
Subcontracting					
Name of sub-contractor	Country	Description	Work package no.	Total [EUR]	
to be defined	Italy	Pro quota EEN Italian Web site	5	2.000	
to be defined	Italy	Pro quota EEN Italian Press Officer	5	1.000	
				Subtotal:	3.000
				Total eligible direct costs:	277.901
				Total eligible costs:	346.626

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Executive Agency for Small and Medium-sized Enterprises (EASME)

Call Identifier: COSME-2014-2.7

Data Partner 4

SME2EU

Organisation short name	AP	Participant No	4	Participant Role ⁷	CP
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Direct staff costs

Name of the staff and category (e.g. senior expert, expert, junior expert, etc.) ⁶	Hours on Project (A)	Hourly Rate (B)	Direct Staff costs (AxB)
Annamaria Di Patrizio - Head of Department	2.236	40,89	91.435,50
Giocondo Recchi - Senior staff	2.993	27,89	83.481,72
Luca Battigaglia - Senior staff	2.614	26,66	69.692,00
			0,00
			0,00
			0,00
			0,00
			0,00
			0,00
			0,00
			0,00
			0,00
			0,00
			0,00
Total	7.843		244.609,22

Travel costs and subsistence allowances for personnel

	Number of travels	Average travel and subsistence costs	Total [EUR]
International travels	2	800	1.600
National travels	40	80	3.200
Subtotal:			4.800

Costs of other services

Description	Work package no.	Total [EUR]
Communication and Promotional Material (graphic designer, printing, purchase..)	5	1.795
Web agency to create and manage Consortium web site and web marketing activities/social media	5	7.000
Web platform to handle EEN newsletters	5	6.000
Participation fee - Enterprise Europe Network Annual Conference	6	200
Subtotal:		14.995

Data Partner 4

SME2EU

Organisation short name	AP	Participant No	4	Participant Role	CP
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Subcontracting

Name of sub-contractor	Country	Description	Work package no.	Total [EUR]
To be defined	Italy	Pro quota National Web site	5	574
To be defined	Italy	Pro quota National Press Officer	5	1.338
Subtotal:				1.912
			Total eligible direct costs:	266.316
			Total eligible costs:	332.417

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Executive Agency for Small and Medium-sized Enterprises (EASME)					
Call Identifier: COSME-2014-2.7					
Data Partner 7				SME2EU	
Organisation short name	SVIL	Participant No	7	Participant Role ⁷	CP
Direct staff costs:					
Name of the staff and category (e.g. senior expert, expert, junior expert, etc.) ⁶		Hours on Project (A)	Hourly Rate (B)	Direct Staff costs (AxB)	
Mauro Agostini (Senior)		133	135,56	18.029,48	
Marina Sereni (Senior)		498	38,09	18.968,82	
Elisa Paradisi (Expert)		450	22,64	10.188,00	
Alessandra Donati (Senior)		432	32,40	13.996,80	
Giuseppe Barberi (Senior)		439	32,50	14.267,50	
Cathleen Foderaro (Senior)		947	22,64	21.440,08	
Valeria Manna (Senior)		1.183	22,64	26.783,12	
				0,00	
				0,00	
				0,00	
				0,00	
				0,00	
				0,00	
Total		4.082		123.673,80	
Travel costs and subsistence allowances for personnel					
	Number of travels	Average travel and subsistence costs		Total [EUR]	
International travels	6	600		3.600	
National travels	9	166		1.494	
				Subtotal:	5.094
Costs of other services					
Description		Work package no.	Total [EUR]		
Annual Conference registration fee		6	224		
National brokerage event (shared organization costs)		2	500		
				Subtotal:	724
Data Partner 7				SME2EU	
Organisation short name	SVIL	Participant No	7	Participant Role	CP
Subcontracting					
Name of sub-contractor	Country	Description	Work package no.	Total [EUR]	
To be appointed	Italy	Pro quota EEN Italian Press Officer	5	656	
To be appointed	Italy	Pro quota EEN Italian Web site	5	284	
				Subtotal:	940
				Total eligible direct costs:	130.432
				Total eligible costs:	162.805

BUDGET NOTE

P2 CONFINDUSTRIA TOSCANA (CT)

The budget table (pag. 35) includes the costs of the Third Party organization Confindustria Toscana Servizi (CTS), Linked to Beneficiary Confindustria Toscana (CT), which will carry out the activities WP1(Advice, support and information activities), WP2 (Cross-border partnering activities for business cooperation, technology transfer, innovation and research) and WP5 (Promotion of Network services and communication activities) incurring estimated costs (€ 56.272,00) and requesting EC contribution of 60%.

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P4 CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO (AP)

The budget table (pag. 37) includes the costs of the Third Party organization Piceno Promozione (PP), Linked to Beneficiary Camera di Commercio Industria Artigianato e Agricoltura di Ascoli Piceno (AP), which will carry out the activities WP1 (Advice, support and information activities), WP2 (Cross-border partnering activities for business cooperation, technology transfer, innovation and research), WP3 (SME feedback activities), WP 5 (Promotion of Network services and communication activities), WP6 (Networking building and reinforcing the Network) incurring estimated costs (€ 330.505,00) and requesting EC contribution of 60%.

Annex 1, 2 & 3 should be attached to the Work Programme and submitted as an integral set.

Enter below your partner's name(s)

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Annex 1 -
Performance Enhancement System
(PES)

DI#	DI_LABEL	Consortium value is	Consortium SME2EU	P01-PF	P02-CT	P03-EUC	P04-AP	P05-CDO	P06-CEU	P07-SVTL
DI01	# Regional/local events organised	max(P)	86	16	23	23	10	6	6	2
DI02	# Participants in regional/local events	sum(P)	2995	600	540	550	450	180	450	225
DI03	# SMEs/clients receiving individual advisory support	sum(P)	713	120	150	150	85	57	70	81
DI04	# Brokerage events/company missions organised	sum(P)	34	6	9	4	5	4	2	4
DI05	# SMEs/clients in brokerage events/company missions	sum(P)	188	42	50	18	20	32	20	6
DI06	# Meetings at brokerage events/company missions	sum(P)	464	84	130	36	60	96	50	8
DI07	# Partnership profiles produced	sum(P)	251	50	45	70	30	27	15	14
DI08	# Expression of interests received	sum(P)	261	40	70	70	30	27	10	14
DI09	# Expression of interests made	sum(P)	378	70	70	115	40	40	20	23
DI10	# Clients in feed-back related actions	sum(P)	73	26	10	8	15	10	4	0
DI11	# Clients mentored	sum(P)								
DI12	# Achievements	sum(P)	56	9	10	13	8	4	4	8
DI13	# SMEs/clients using digital services provided by the Network	sum(P)	75600	11200	18920	15000	21520	3500	4020	1440
DI14	# Cooperation with local stakeholders	sum(P)	35	6	6	6	6	4	3	4
DI15	# Answered enquiries from Network partners	sum(P)	202	30	22	30	22	22	22	54
DI16	# Active contributions to Network activities	sum(P)	173	32	20	32	28	19	19	23

Annex 2 - Consortium's hours planned

Val_Type	A_Type	ACTIVITY_TYPE		Consortium SME2EU	P01-PF	P02-CT	P03-EUC	P04-AP	P05-CDO	P06-CEU	P07-SVIL				
HRS	A01	Advice, support and information activities	sum(P)	17.137	5.110	2.738	2.858	2.197	2.314	940	980				
HRS	A02	Cross-border partnering activities for business cooperation, technology transfer and innovation	sum(P)	14.803	3.470	1.851	3.550	2.352	1.448	588	1.544				
HRS	A03	SME feedback activities	sum(P)	1.814	578	222	374	236	286	118	0				
HRS	A05	Promotion of Network services and communication activities	sum(P)	7.898	1.356	1.110	1.834	1.568	862	354	814				
HRS	A06	Network building and reinforcing the Network	sum(P)	7.094	2.116	1.110	1.408	1.098	582	236	544				
HRS	A07	Management activities	sum(P)	2.594	696	370	528	392	290	118	200				
HRS			sum(P)	51.340	13.326	7.401	10.552	7.843	5.782	2.354	4.082				

Annex 3 - Consortium's services

A_TYPE	SERVICE_TYPE	P01-PF	P02-CT	P03-EUC	P04-AP	P05-CDO	P06-CEU	P07-SVIL						
A01	Advice on EU legislation and EU policies, standards in the Single Market, tender opportunities, pp. etc.	X	X	X	X	X	X							
A01	Advice on EU programmes and European funding opportunities		X	X	X	X	X	X						
A01	Advice on Innovation and technology transfer		X	X	X			X						
A01	Advice on Partnering process on market intelligence, identification of suitable growth markets, local business	X			X	X	X	X						
A01	Advice on Access to finance for SMEs	X	X	X	X	X	X	X						
A01	Sport for improving the management capacities of SMEs		X	X		X	X	X						
A01	Advice on Intellectual Property (IP) issues	Stakeholders	Stakeholders	Stakeholders	Stakeholders	Stakeholders		X						
A01	Advice on Energy and resource efficiency	Stakeholders	Stakeholders	Stakeholders	Stakeholders	Stakeholders		X						
A01	General Information on EU Subjects above mentioned	X	X	X	X	X	X	X						
A02	Partnering services on Business/commercial collaboration	X	X	X	X	X	X	X						
A02	Partnering services on Innovation/technology transfer		X	X	X			X						
A02	Partnering services on R&D activities of SMEs in European research programmes		X	X	X	X		X						
A03	SME consultation and feedback cases	X	X	X	X	X	X							
A03														
A03	...													
A05	Promotion of Network's services and communication activities	X	X	X	X	X	X	X						
A05														
A05	...													
A06	Network building and reinforcing the Network	X	X	X	X	X	X	X						
A06														
A06	...													

ENTERPRISE EUROPE NETWORK

CODE OF CONDUCT

Preamble

The Code of Conduct is a key document for the Enterprise Europe Network which outlines the principles shared and followed by the Network partners to which they commit as members of the Network.

The concrete implementation of these principles, including recommendations and good practices, will be described in the Operational Manual.

By adhering to the Code of Conduct, the Partners commit to share the same core values, to follow the same operational principles and to respect the quality principles with regard to the key relationships.

CHAPTER 1 - Core values

PARTNERS

Professionalism

Adding European Value

Responsiveness

Trust

Network

Encouragement

Relationships

SME focus

Professionalism

Professionals use their knowledge and skills to the benefit of their clients according to the state-of-the-art of their profession, using protocols when available and appropriate and discretion when needed.

- The manager consulted by his co-workers ensures the efficient use of resources and effective co-operation with other teams, in order to maximise the performance. He aims to realize the performance targets agreed upon, but never accepts unprofessional work.

- The manager ensures the constant development of the knowledge and skills of himself and his team. He also stimulates the contribution of his co-workers to the development of the profession/discipline.
- The work of the team must comply with quality principles and be assessed regularly by peers.

Adding European Value

European added value means that the goals, methodology and nature of the co-operation undertaken have an aspect that is not merely confined to local, regional or even national interests, but which has a European scope.

It is possible to identify six potential ways to create European added value in Network activities:

- | |
|---|
| <ul style="list-style-type: none">• Promoting cross border and transnational activities• Making the most of the internal market for SMEs in terms of competitiveness• Assisting SMEs in interpreting and applying EU legislation• Informing and advising SMEs on accessing EU funding• Promoting best practices among Network partners• Contributing to and taking advantage of the Network effect |
|---|

Responsiveness

Responsiveness means being able to react quickly towards clients as well as other colleagues, by using an appropriate, polite way to acknowledge having received an enquiry and provide details on how quickly the information or support can be provided. A Network staff should be approachable (available on the phone/for meetings, etc.), flexible and knowledgeable on the subjects he/she talks about. The Network staff is mindful and respectful of the needs, drivers and motivations of the client.

Trust and trust-building

Due to the interdependence of their activities, partners often depend on other partners to help their company clients. There is therefore a need for trust.

The Network should be "a place where people trust each other, are high performing, accountable, hold each other to high standards and are honest with each other."

Networking

The Enterprise Europe Network is teamwork at its finest. Hundreds of highly committed people work in the Network, trying to make the internal market work for SMEs. Network partners have only limited time and budgets to do it. They understand the difficulty of their mission and are determined to achieve whatever they can. Members do not all have the same capabilities but offer a variety of skills, talents, experience and attitudes that enrich their support to their clients and colleagues and provide a broader range of options.

Encouragement

The Network is only as strong as its weakest link. It is therefore important to ensure that all Network partners identify their strengths and areas of expertise, and share this knowledge with their colleagues. It is also important for Network partners to objectively identify weaknesses within their own consortia and find solutions to address them possibly in collaboration with other Network partners. Within this atmosphere of mutual respect of our strengths and weaknesses, and an open approach to sharing best practice, encouragement thrives.

Encouragement is not only restricted to the Network, but should extend to the relationships with clients and stakeholders. Partners have the expertise, knowledge and connections required for a company to innovate, internationalise and grow, and this should be exploited to clients' advantage.

Relationships

Partnerships in business can be challenging. It is widely acknowledged that most partnerships fail. However, the ones that succeed can achieve much greater levels of success more rapidly than if the same individuals tried to achieve the same goals alone.

SME Focus: “THINKING BIG FOR SMALL BUSINESSES”

- What are SMEs?

Small and medium-sized enterprises (SMEs), are defined as economically independent companies with less than 250 employees and less than € 50 million annual turnover (or € 43 million annual balance sheet total). There are over 20 million in the EU, representing 99% of businesses.

- Why do we focus on SMEs? Why are they so important?
 - SMEs are responsible for the majority of new jobs created in Europe and contribute to growth and prosperity. Moreover, their capacity for innovation and flexibility in a changing business environment makes them crucial for Europe's success in the global economy.
 - SMEs do not have access to the same resources (financial, human, knowledge) than bigger companies which usually have specific departments to help them fulfil their international ambitions, find out about the legal situation, and obtain market intelligence. The Network can be the added „team” or „department” an SME needs to take their business further.
- Why do we need action at EU level?
 - SMEs around Europe face the same type of problems: administrative burden, difficulty to find financing and skilled labour, or to take opportunity of the Single Market. Addressing some of these problems together through a partnership

between the EU and the Member States can bring considerable and tangible results.

- The Enterprise Europe Network is the gateway to competitiveness for European small businesses. Network partners can help businesses find business partners. They also assist them by raising awareness and by providing access to information needed to develop a business. Promoting transnational technology cooperation and ensuring access to innovative technologies is another priority of the Enterprise Europe Network.

CHAPTER 2 Main principles

The Network partners commit to adhere to the following main principles.

Providing a professional service

It is important for Network partners to provide a professional service for the benefit of their clients, as illustrated by the following actions:

- Recruit staff with at least the minimum qualification and experience required to efficiently deliver the Network's services to their clients.
- Endeavour to continuously update and improve the skills of individual staff members to help enhance the knowledge and expertise of the Network overall.
- Provide the same quality of service to clients of other Network Partners as they would to their own clients.
- Follow agreed Network processes and procedures at all times.
- Respect mutually established deadlines and be accountable for agreed measures and rules of the Network or Network Groups.
- Be realistic in the level of support they can offer to a colleague and communicate any difficulties that arise in delivering this support.

Adhering to the “no wrong door” principle

It is of the utmost importance for Network Partners to adhere to the “No Wrong Door” principle.

This is one of the key principles of the Enterprise Europe Network and entails the implementation of an effective mechanism for signposting towards other providers of services in their region, for the benefit of all clients.

The “No Wrong Door” principle implies the following:

- Each client shall be guided towards the most appropriate service provider for their business needs.

- When the most appropriate service provider is not the Network Partner initially contacted, it will be the responsibility of that Network Partner to signpost the client to the correct service or organisation within the Network.
- When signposting a client to another provider within the Network, Network Partners can depend on their Network colleagues to follow the common values and principles set out in this Code of Conduct relating to response time, follow up and general behaviour which will ensure that their clients receive the best possible service. (See Chapter 3)
- Network Partners will build synergies with other complementary service providers outside the Network in their geographic area.
- Network Partners shall make sure that they know in detail what services other providers can offer, along with the correct contact details, to ensure their clients are signposted confidently and correctly.
- When signposting clients to a service provider outside the Network, Network Partners should attempt to agree in advance what level of service and standards their clients can expect to receive.
- Network Partners must not signpost a client to another service provider outside the Network, unless they are positive that this provider can fulfil a client's business needs with a prompt, high-quality service.

Being a cooperative and loyal member of the Network

- Sharing a common vision, aims and values will enhance the commitment, enthusiasm and effectiveness of the Network, as well as allowing Network Partners to learn from each other and share good practice.
- Make the Network aware of areas of expertise, through Network tools or otherwise, and be prepared to use this expertise when assistance is requested from another Network Partner.

CHAPTER 3 Relationships with clients

In their relationships with their clients, each Network Partner shall commit to:

Putting clients' interests first

The Enterprise Europe Network aims to help businesses become more innovative and internationally competitive; therefore it is crucial that Network Partners give priority to activities and services which will assist their clients in this way.

Network Partners will put clients' interests first by:

- Delivering on all promises in terms of realistic services offered.
- Making sure that all clients have access to all appropriate services.

- Disregarding criteria for membership of Host Organisations and offering the same level of services to all potential clients in the region.
- Considering whether there is another Network Partner or service provider in the region who could better assist the client and signpost them, in line with the “No Wrong Door” principle.

Being responsive

In order to provide clients with a professional and reliable service, Network Partners must respond to all clients’ requests quickly and comprehensively.

The following principles must be implemented:

- Network partners shall acknowledge receipt of messages within a reasonable time limit.
- Network Partners shall always provide a response to the client, no matter what the outcome.
- Network Partners are required to keep the client informed of the progress of their request.
- Network Partners shall inform the clients if their request has been signposted to another service provider and give an approximation of when they can expect to be contacted by this provider.

Upholding confidentiality and acting on authority

Clients must be assured that all the information which they share will be kept confidential and It is therefore imperative that Network Partners protect this information with care and attention and do not pass on company or product details without prior consent.

Being open and transparent when outlining services

To ensure clients have a clear understanding from the onset of the level of support which they will receive from the Network, it is essential for Network Partners to be both honest and realistic about the scope of services.

An outline of services must:

- Draw attention to the benefits of the Network, but prepare the client for both a positive and a negative result.
- Manage expectations with regard to the length of time required to collect comprehensive and good quality information from the Network.
- Clearly establish the terms of the two-way relationship between the Network Partner and the client with regard to limits of the intervention, communication of preliminary information from the client, possible costs for the client and anticipated response times.

- Highlight additional or complementary services which might also be available within the Network or region, in line with the “No Wrong Door” principle.

Following up

To contribute to the professionalism of the Network and to maintain good working relationships, it is necessary for Network Partners to stay in regular contact with the client and react to any changes in situation or any feedback given.

The time frame and the method used for this follow-up will be determined by Network Partners, depending on the service provided and the number of companies to be contacted.

Network Partners should actively seek feedback on the level of client satisfaction and use this as one of the measures of the quality of their services.

CHAPTER 4 Relationships between Partners within the Enterprise Europe Network

In their relationships with other Network Partners and with the Executive Agency, each Network Partner shall commit to:

Being pro-active

Each Network partner should actively build up and maintain relations with other Network partners, particularly in other Member States, in order to facilitate cooperation for providing Network services.

Being responsive

To contribute to the value and effectiveness of the Network, it is essential that Network Partners respond to messages, enquiries and requests promptly and comprehensively.

Network Partners will always provide a response, no matter what the outcome.

Being responsible with all correspondence

To ensure smooth, successful communication within the Network, avoid wasting time and ultimately guarantee a better service for our clients, it is necessary that Network Partners are not only prompt, but also act responsibly with regards to the messages which they both send and receive.

CHAPTER 5 Relationships within the Network, at a national level

In their relationships with other Network Partners at a national level, each Network Partner shall commit to:

Keeping in regular contact with other Network Partners in their country

To develop a strong and cooperative relationship where all Network Partners work together for the benefit of increasing competitiveness and innovation of SMEs in their country, it is important for the Network Partners to ensure open and regular communication with other network partners in their country.

To maintain this open communication, it is recommended that:

- Network partners are aware of the strengths and expertise of their fellow national Network partners
- Network partners commit to establish and maintain suitable communication at a national level, taking into account each country's specificities.

Contributing to Enterprise Europe Network's visibility at a national level

All Network partners should contribute to the national visibility of the Network, ensuring that both SMEs and national stakeholders are aware of the activities and services of the Enterprise Europe Network in their country.

The following activities should be considered:

- Representing the interests of the Network, rather than individual Network Partners, when communicating with national stakeholders.
- Interacting with the European Commission Representation Office in their country and looking for opportunities for combined activities.

CHAPTER 6 Relationships within the consortium

In their relationships with other Network Partners within their consortium, each Network Partner shall commit to:

Creating a common consortium identity at regional level

To highlight the activities and services provided by the consortium to all clients and stakeholders in a particular region, it is important to publicise the existence of the consortium and to ensure that Network Partners can be identified as being part of the consortium.

Being aware of other Partners' expertise within the consortium

To ensure correct signposting within the consortium, and respect the "No Wrong Door" principle, it is necessary to make sure that each Network Partner has sufficient knowledge of the strengths and competences of their fellow consortium members.

Keeping in regular contact with colleagues in the consortium

In order to establish successful and durable working relationships, Network Partners must stay in frequent contact with fellow consortium members.

Sharing important information within the consortium

A two-way flow of important information between Consortium Coordinators and Network Partners is vital to ensure successful communication with clients, Network Partners, regional stakeholders and the EASME. Network Partners should inform their Consortium coordinator of any issues impacting the consortium.

Ensuring internal consortium management

Compliance with the internal consortium agreement signed by the partners is essential to ensure that the consortium works together, delivers its activities and fulfils its contractual obligations.

CHAPTER 7 Relationships with other business support services

In their relationships with other business support services, each Network Partner shall commit to:

Being knowledgeable about the services of other business support services

To be able to advise clients on the full range of complementary services on offer in their region, it is necessary for each Network Partner to have sufficient knowledge of all EU business-related support services and other business support organisations active locally.

Being cooperative and finding synergies

To develop stronger working relationships and for the benefit of increasing competitiveness and innovation of SMEs in their country, it is important for the Network Partners to increase collaboration with other business support services and find synergies with their own services and activities.

Being proactive

To enhance the effectiveness of cooperation between all business support services for the benefit of clients, it is advisable for Network Partners to take the initiative in bringing all support services together with the aim of working closer together in the region.

Signposting clients to other business support services

To make full use of all expertise and experience available and to ensure clients receive assistance no matter who they approach and in line with the “No Wrong Door” principle, it is fundamental for Network Partners to actively signpost to the other business support services.

ESTIMATED BUDGET FOR THE ACTION (page 1 of 2)

	Estimated eligible ¹ costs (per budget category)								EU contribution			Additional information			
	A. Direct personnel costs				B. Direct costs of subcontracting	[C. Direct costs of fin. support]	D. Other direct costs	E. Indirect costs ²	Total costs	Reimbursement rate %	Maximum EU contribution ³	Maximum grant amount ⁴	Information for indirect costs	Information for auditors	Other information:
	A.1 Employees (or equivalent) A.2 Natural persons under direct contract (other than A.1) or Persons seconded by a third party						D.1 Travel D.2 Equipment D.3 Other goods and services D.4 Costs of large research infrastructure						Estimated costs of in-kind contributions not used on premises	Declaration of costs under Point D.4	Estimated costs of beneficiaries/ linked third parties not receiving EU funding
Form of costs ⁵	Actual	Unit ⁶	Unit		Actual	Actual	Actual	Flat-rate ⁷							
								25%							
	(a)	Total (b)	No hours	Total (c)	(d)	(e)	(f)	(g)=0,25x ((a)+(b)+(c)+(f) +[(h1)+(h2)]-(m))	(i)= (a)+(b)+(c)+(d)+(e)+(f)+(g)+(h1)+(h2)+(h3)	(j)	(k)	(l)	(m)	Yes/No	
1. METROPOLI	382610.40				3000.00		31641.00	103562.85	520814.25	60.00		312488.55			
2. Confindustria Toscana	208056.41				3000.00		21827.00	57470.85	290354.26	60.00		174212.56			
- CTS ⁹	42857.36				0.00		2160.00	11254.34	56271.70	60.00	33763.02	33763.02			
Total partner 2	250913.77				3000.00		23987.00	68725.19	346625.96			207975.58			
3. Eurosportello Confesercenti	250607.62				1993.00		25099.00	68926.66	346626.28	60.00		207975.77			
4. CAMERA DI COMMERCIO INDUSTRIA ARTIGIANATO E AGRICOLTURA DI ASCOLI PICENO	0.00				1912.00		0.00	0.00	1912.00	60.00		1147.20			
- Piceno Promozione ⁹	244609.22				0.00		19795.00	66101.06	330505.28	60.00	198303.17	198303.17			
Total partner 4	244609.22				1912.00		19795.00	66101.06	332417.28			199450.37			
5. Compagnia delle Opere Pesaro Urbino	96103.16				895.00		5211.00	25328.54	127537.70	60.00		76522.62			
6. CENTROESTERO	66556.92				515.00		4760.00	17829.23	89661.15	60.00		53796.69			
7. SVILUPPUMBRIA SPA	123673.80				940.00		5818.76	32373.14	162805.70	60.00		97683.42			
Total consortium	1415074.89				12255.00		116311.76	382846.67	1926488.32			1155893.00			0.00

ESTIMATED BUDGET FOR THE ACTION (page 2 of 2)

- (1) See Article 5 SGA for the eligibility conditions.
- (2) The indirect costs claimed must be free of any amounts covered by an operating grant (received under any EU or Euratom funding programme; see Article 5.2.E SGA). A partner that receives an operating grant during the action's duration cannot claim any indirect costs for the year(s)/reporting period(s) covered by the operating grant.
- (3) This is the theoretical amount of EU contribution that the system calculates automatically (by multiplying all the budgeted costs by the reimbursement rate). This theoretical amount is capped by the 'maximum grant amount' (that the Agency decided to grant for the action) (see Article 4.1 SGA).
- (4) The 'maximum grant amount' is the maximum grant amount decided by the Agency. It normally corresponds to the requested grant, but may be lower.
- (5) See Article 4 SGA for the forms of costs.
- (6) Unit : hours worked on the action; costs per unit (hourly rate) : calculated according to partner's usual accounting practice.
- (7) Flat rate : 25% of eligible direct costs, from which are excluded: direct costs of subcontracting, costs of in-kind contributions provided by third parties which are not used on the partner's premises (see Article 5.2.E.SGA).
- (8) See Article 7 for beneficiaries not receiving EU funding.
- (9) Only for linked third parties that receive EU funding.

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MODEL ANNEX 3 FOR EEN COSME SGA — MULTI

FINANCIAL STATEMENT FOR [BENEFICIARY [name]/ LINKED THIRD PARTY [name]]

Form of costs ⁴	Eligible ¹ costs (per budget category)											Receipts	EU contribution			Additional information		
	A. Direct personnel costs				B. Direct costs of subcontracting	[C. Direct costs of fin. support]	D. Other direct costs		E. Indirect costs ²	[F. Costs of ...]		Total costs	Receipts	Reimbursement rate %	Maximum EU contribution ³	Requested EU contribution	Information for indirect costs :	
	A.1 Employees (or equivalent)						D.1 Travel			[F.1 Costs of ...]		[F.2 Costs of ...]		Receipts of the action, to be reported in the last reporting period, according to Article 5.3.3				Costs of in-kind contributions not used on premises
	A.2 Natural persons under direct contract (other than A.1) or Persons seconded by a third						D.2 Depreciation for Equipment etc. D.3 Other goods and services											
	Actual	Unit	[Unit]		Actual	Actual	Actual	[Actual]	Flat-rate ⁵	[Unit]		[Unit]						
			XX EUR/hour					25%	XX EUR/unit									
	a	Total b	No hours	Total [c]	d	[e]	f	[g]	h=0,25x(a+b+[c]+f+[g]+[i1] ⁶ + [i2] ⁶ -o)	No units	Total [i1]	Total [i2]	j = a+b+[c]+d+[e]+f+[g]+h+[i1]+[i2]	k	l	m	n	o

The beneficiary/linked third party hereby confirms that:
The information provided is complete, reliable and true.
The costs declared are eligible (see Article 5 SGA).
The costs can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations (see Articles 23, 24 and 28 FPA).
For the last reporting period: that all the receipts have been declared (see Article 4.3.3 SGA).

Please declare all eligible costs, even if they exceed the amounts indicated in the estimated budget (see Annex 2). Only amounts that were declared in your individual financial statements can be taken into account lateron, in order to replace other costs that are found to be ineligible.

¹ See Article 5 SGA for the eligibility conditions.

² The indirect costs claimed must be free of any amounts covered by an operating grant (received under any EU or Euratom funding programme; see Article 5.2.E SGA). If you have received an operating grant during this reporting period, you cannot claim any indirect costs.

³ This is the *theoretical* amount of EU contribution that the system calculates automatically (by multiplying the reimbursement rate by the total costs declared). The amount you request (in the column 'requested EU contribution') may have to be less.

⁴ See Article 4 SGA for the forms of costs.

⁵ Flat rate : 25% of eligible direct costs, from which are excluded: direct costs of subcontracting, costs of in-kind contributions provided by third parties which are not used on the partner's premises (see Article 5.2.E SGA).

ANNEX 4

MODEL FOR THE CERTIFICATE ON THE FINANCIAL STATEMENTS

- For options [*in italics in square brackets*]: choose the applicable option. Options not chosen should be deleted.
- For fields in [grey in square brackets]: enter the appropriate data

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Terms of Reference for an Independent Report of Factual Findings on costs declared under a EEN specific action financed under the COSME Programme

This document sets out the ‘**Terms of Reference (ToR)**’ under which

[OPTION 1: [insert name of the partner] (*‘the Partner’*)] [OPTION 2: [insert name of the linked third party] (*‘the Linked Third Party’*), third party linked to the Partner [insert name of the partner] (*‘the Partner’*)]

agrees to engage

[insert legal name of the auditor] (*‘the Auditor’*)

to produce an independent report of factual findings (*‘the Report’*) concerning the Financial Statement(s)¹ drawn up by the [Partner] [Linked Third Party] for the Horizon 2020 specific agreement [insert number of the specific agreement, title of the specific action, acronym and duration from/to] (*‘the Agreement’*), and

to issue a Certificate on the Financial Statements’ (*‘CFS’*) referred to in Article 16 of the Specific Agreement based on the compulsory reporting template stipulated by the Commission.

The Agreement has been concluded under the COSME Programme between the Partner and Executive Agency for Small and Medium-sized Enterprises (EASME] (*‘the Agency’*), under the powers delegated by the European Commission (*‘the Commission’*).

The Agency is mentioned as a signatory of the Agreement with the *Partner* only. The Agency is not a party to this engagement.

¹ By which costs under the Agreement are declared (see template ‘Model Financial Statements’ in Annex 4 to the Specific Grant Agreement).

1.1 Subject of the engagement

The coordinator must submit to the Agency the final report within 60 days following the end of the last reporting period which should include, amongst other documents, a CFS for each *partner* and for each linked third party that requests a total contribution of EUR 325 000 or more, as reimbursement of actual costs and unit costs calculated on the basis of its usual cost accounting practices (see Article 16 of the Specific Agreement). The CFS must cover all reporting periods of the partner or linked third party indicated above.

The *Partner* must submit to the coordinator the CFS for itself and for its linked third party(ies), if the CFS must be included in the final report according to Article 16 of the Specific Agreement..

The CFS is composed of two separate documents:

- The Terms of Reference ('the ToR') to be signed by the *[Partner]* *[Linked Third Party]* and the Auditor;
- The Auditor's Independent Report of Factual Findings ('the Report') to be issued on the Auditor's letterhead, dated, stamped and signed by the Auditor (or the competent public officer) which includes the agreed-upon procedures ('the Procedures') to be performed by the Auditor, and the standard factual findings ('the Findings') to be confirmed by the Auditor.

If the CFS must be included in the final report according to Article 16 of the Specific Agreement, the request for payment of the balance relating to the Agreement cannot be made without the CFS. However, the payment for reimbursement of costs covered by the CFS does not preclude the *Agency*, the European Anti-Fraud Office and the European Court of Auditors from carrying out checks, reviews, audits and investigations in accordance with Article 28 of the Framework Partnership Agreement.

1.2 Responsibilities

The *[Partner]* *[Linked Third Party]*:

- must draw up the Financial Statement(s) for the action financed by the Agreement in compliance with the obligations under the Agreement. The Financial Statement(s) must be drawn up according to the *[Partner's]* *[Linked Third Party's]* accounting and book-keeping system and the underlying accounts and records;
- must send the Financial Statement(s) to the Auditor;
- is responsible and liable for the accuracy of the Financial Statement(s);
- is responsible for the completeness and accuracy of the information provided to enable the Auditor to carry out the Procedures. It must provide the Auditor with a written representation letter supporting these statements. The written representation letter must state the period covered by the statements and must be dated;
- accepts that the Auditor cannot carry out the Procedures unless it is given full access to the *[Partner's]* *[Linked Third Party's]* staff and accounting as well as any other relevant records and documentation.

The Auditor:

- *[Option 1 by default: is qualified to carry out statutory audits of accounting documents in accordance with Directive 2006/43/EC of the European Parliament and of the Council of 17 May 2006 on statutory audits of annual accounts and consolidated accounts, amending Council Directives 78/660/EEC and 83/349/EEC and repealing Council Directive 84/253/EEC or similar national regulations].*

- *[Option 2 if the Partner or Linked Third Party has an independent Public Officer: is a competent and independent Public Officer for which the relevant national authorities have established the legal capacity to audit the Partner].*
- *[Option 3 if the Partner or Linked Third Party is an international organisation: is an [internal] [external] auditor in accordance with the internal financial regulations and procedures of the international organisation].*

The Auditor:

- must be independent from the Partner *[and the Linked Third Party]*, in particular, it must not have been involved in preparing the *[Partner's] [Linked Third Party's]* Financial Statement(s);
- must plan work so that the Procedures may be carried out and the Findings may be assessed;
- must adhere to the Procedures laid down and the compulsory report format;
- must carry out the engagement in accordance with this ToR;
- must document matters which are important to support the Report;
- must base its Report on the evidence gathered;
- must submit the Report to the *[Partner] [Linked Third Party]*.

The Commission sets out the Procedures to be carried out by the Auditor. The Auditor is not responsible for their suitability or pertinence. As this engagement is not an assurance engagement, the Auditor does not provide an audit opinion or a statement of assurance.

1.3 Applicable Standards

The Auditor must comply with these Terms of Reference and with²:

- the International Standard on Related Services ('ISRS') 4400 *Engagements to perform Agreed-upon Procedures regarding Financial Information* as issued by the International Federation of Accountants (IFAC);
- the *Code of Ethics for Professional Accountants* issued by the IFAC. Although ISRS 4400 states that independence is not a requirement for engagements to carry out agreed-upon procedures, the Agency requires that the Auditor also complies with the Code's independence requirements.

The Auditor's Report must state that there is no conflict of interests in establishing this Report between the Auditor and the Partner *[and the Linked Third Party]*, and must specify - if the service is invoiced - the total fee paid to the Auditor for providing the Report.

1.4 Reporting

The Report must be written in the language of the Agreement (see Article 16 SGA).

Under Article 28 of the Framework Partnership Agreement, the Agency, the European Anti-Fraud Office and the Court of Auditors have the right to audit any work that is carried out under the specific action and for which costs are declared from the European Union budget. This includes work related to this engagement. The Auditor must provide access to all working papers (e.g. recalculation of hourly rates, verification of the time declared for the action) related to this assignment if the Agency, the European Anti-Fraud Office or the European Court of Auditors requests them.

² Supreme Audit Institutions applying INTOSAI-standards may carry out the Procedures according to the corresponding International Standards of Supreme Audit Institutions and code of ethics issued by INTOSAI instead of the International Standard on Related Services ('ISRS') 4400 and the Code of Ethics for Professional Accountants issued by the IFAC.

1.5 Timing

The Report must be provided by [dd Month yyyy]/.

1.6 Other terms

[The [Partner] [Linked Third Party] and the Auditor can use this section to agree other specific terms, such as the Auditor's fees, liability, applicable law, etc. Those specific terms must not contradict the terms specified above.]

[legal name of the Auditor]	[legal name of the [Partner][Linked Third Party]]
[name & function of authorised representative]	[name & function of authorised representative]
[dd Month yyyy]	[dd Month yyyy]
Signature of the Auditor	Signature of the [Partner][Linked Third Party]

Independent Report of Factual Findings on costs declared under COSME Programme

(To be printed on the Auditor's letterhead)

To

[name of contact person(s)], [Position]
[*[Partner's]* *[Linked Third Party's]* name]
[Address]
[dd Month yyyy]

Dear [Name of contact person(s)],

As agreed under the terms of reference dated [dd Month yyyy]

with [OPTION 1: *[insert name of the partner]* ('the Partner')] [OPTION 2: *[insert name of the linked third party]* ('the Linked Third Party'), third party linked to the Partner *[insert name of the partner]* ('the Partner')],

we

[name of the auditor] ('the Auditor'),

established at

[full address/city/state/province/country],

represented by

[name and function of an authorised representative],

have carried out the procedures agreed with you regarding the costs declared in the Financial Statement(s)³ of the *[Partner]* *[Linked Third Party]* concerning the specific grant agreement

[insert specific agreement reference: number, title of the action and acronym] ('the Agreement'),

with a total cost declared of

[total amount] EUR,

and a total of actual costs and 'direct personnel costs declared as unit costs calculated in accordance with the *[Partner's]* *[Linked Third Party's]* usual cost accounting practices' declared of

[sum of total actual costs and total direct personnel costs declared as unit costs calculated in accordance with the *[Partner's]* *[Linked Third Party's]* usual cost accounting practices] EUR

and **hereby provide our Independent Report of Factual Findings ('the Report')** using the compulsory report format agreed with you.

The Report

Our engagement was carried out in accordance with the terms of reference ('the ToR') appended to this Report. The Report includes the agreed-upon procedures ('the Procedures') carried out and the standard factual findings ('the Findings') examined.

³ By which the Partner declares costs under the Specific Agreement (see template 'Model Financial Statement' in Annex 3 to the Specific Agreement).

The Procedures were carried out solely to assist the Agency in evaluating whether the [partner's] [Linked Third Party's] costs in the accompanying Financial Statement(s) were declared in accordance with the Agreement. The Agency draws its own conclusions from the Report and any additional information it may require.

The scope of the Procedures was defined by the Commission. Therefore, the Auditor is not responsible for their suitability or pertinence. Since the Procedures carried out constitute neither an audit nor a review made in accordance with International Standards on Auditing or International Standards on Review Engagements, the Auditor does not give a statement of assurance on the Financial Statements.

Had the Auditor carried out additional procedures or an audit of the [Partner's] [Linked Third Party's] Financial Statements in accordance with International Standards on Auditing or International Standards on Review Engagements, other matters might have come to its attention and would have been included in the Report.

Not applicable Findings

We examined the Financial Statement(s) stated above and considered the following Findings not applicable:

Explanation (to be removed from the Report):

If a Finding was not applicable, it must be marked as 'N.A.' ('Not applicable') in the corresponding row on the right-hand column of the table and means that the Finding did not have to be corroborated by the Auditor and the related Procedure(s) did not have to be carried out.

The reasons of the non-application of a certain Finding must be obvious i.e.

- i) if no cost was declared under a certain category then the related Finding(s) and Procedure(s) are not applicable;*
- ii) if the condition set to apply certain Procedure(s) are not met the related Finding(s) and those Procedure(s) are not applicable. For instance, for Partners with accounts established in a currency other than euro' the Procedure and Finding related to 'partners with accounts established in euro' are not applicable. Similarly, if no additional remuneration is paid, the related Finding(s) and Procedure(s) for additional remuneration are not applicable.*

List here all Findings considered not applicable for the present engagement and explain the reasons of the non-applicability.

....

Exceptions

Apart from the exceptions listed below, the [Partner] [Linked Third Party] provided the Auditor all the documentation and accounting information needed by the Auditor to carry out the requested Procedures and evaluate the Findings.

Explanation (to be removed from the Report):

- If the Auditor was not able to successfully complete a procedure requested, it must be marked as 'E' ('Exception') in the corresponding row on the right-hand column of the table. The reason such as the inability to reconcile key information or the unavailability of data that prevents the Auditor from carrying out the Procedure must be indicated below.*
- If the Auditor cannot corroborate a standard finding after having carried out the corresponding procedure, it must also be marked as 'E' ('Exception') and, where possible,*

the reasons why the Finding was not fulfilled and its possible impact must be explained here below.

List here any exceptions and add any information on the cause and possible consequences of each exception, if known. If the exception is quantifiable, include the corresponding amount.

....

Example (to be removed from the Report):

1. *The Partner was unable to substantiate the Finding number 1 on ... because*
2. *Finding number 30 was not fulfilled because the methodology used by the partner to calculate unit costs was different from the one approved by the Commission. The differences were as follows: ...*
3. *After carrying out the agreed procedures to confirm the Finding number 31, the Auditor found a difference of _____ EUR. The difference can be explained by ...*

Further Remarks

In addition to reporting on the results of the specific procedures carried out, the Auditor would like to make the following general remarks:

Example (to be removed from the Report):

1. *Regarding Finding number 8 the conditions for additional remuneration were considered as fulfilled because ...*
2. *In order to be able to confirm the Finding number 15 we carried out the following additional procedures:*

Use of this Report

This Report may be used only for the purpose described in the above objective. It was prepared solely for the confidential use of the [Partner] [Linked Third Party] and the Agency, and only to be submitted to the Agency in connection with the requirements set out in Article 16 of the Specific Agreement. The Report may not be used by the [Partner] [Linked Third Party] or by the Agency for any other purpose, nor may it be distributed to any other parties. The Agency may only disclose the Report to authorised parties, in particular to the European Anti-Fraud Office (OLAF) and the European Court of Auditors.

This Report relates only to the Financial Statement(s) submitted to the Agency by the [Partner] [Linked Third Party] for the Agreement. Therefore, it does not extend to any other of the [Partner's] [Linked Third Party's] Financial Statement(s).

There was no conflict of interest⁴ between the Auditor and the Partner [and Linked Third Party] in establishing this Report. The total fee paid to the Auditor for providing the Report was EUR [] (including EUR [] of deductible VAT).

⁴ A conflict of interest arises when the Auditor's objectivity to establish the certificate is compromised in fact or in appearance when the Auditor for instance:

- was involved in the preparation of the Financial Statements;
- stands to benefit directly should the certificate be accepted;
- has a close relationship with any person representing the Partner;
- is a director, trustee or partner of the Partner; or

We look forward to discussing our Report with you and would be pleased to provide any further information or assistance.

[legal name of the Auditor]

[name and function of an authorised representative]

[dd Month yyyy]

Signature of the Auditor

Agreed-upon procedures to be performed and standard factual findings to be confirmed by the Auditor

The European Commission reserves the right to i) provide the auditor with additional guidance regarding the procedures to be followed or the facts to be ascertained and the way in which to present them (this may include sample coverage and findings) or to ii) change the procedures, by notifying the Partner in writing. The procedures carried out by the auditor to confirm the standard factual finding are listed in the table below.

If this certificate relates to a Linked Third Party, any reference here below to ‘the Partner’ is to be considered as a reference to ‘the Linked Third Party’.

The ‘result’ column has three different options: ‘C’, ‘E’ and ‘N.A.’:

- ‘C’ stands for ‘confirmed’ and means that the auditor can confirm the ‘standard factual finding’ and, therefore, there is no exception to be reported.
- ‘E’ stands for ‘exception’ and means that the Auditor carried out the procedures but cannot confirm the ‘standard factual finding’, or that the Auditor was not able to carry out a specific procedure (e.g. because it was impossible to reconcile key information or data were unavailable),
- ‘N.A.’ stands for ‘not applicable’ and means that the Finding did not have to be examined by the Auditor and the related Procedure(s) did not have to be carried out. The reasons of the non-application of a certain Finding must be obvious i.e. i) if no cost was declared under a certain category then the related Finding(s) and Procedure(s) are not applicable; ii) if the condition set to apply certain Procedure(s) are not met then the related Finding(s) and Procedure(s) are not applicable. For instance, for ‘Partners with accounts established in a currency other than the euro’ the Procedure related to ‘partners with accounts established in euro’ is not applicable. Similarly, if no additional remuneration is paid, the related Finding(s) and Procedure(s) for additional remuneration are not applicable.

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
A	ACTUAL PERSONNEL COSTS AND UNIT COSTS CALCULATED BY THE PARTNER IN ACCORDANCE WITH ITS USUAL COST ACCOUNTING PRACTICE		
	<p>The Auditor draws a sample of persons whose costs were declared in the Financial Statement(s) to carry out the procedures indicated in the consecutive points of this section A.</p> <p><i>(The sample should be selected randomly so that it is representative. Full coverage is required if there are fewer than 10 people (including employees, natural persons working under a direct contract and personnel seconded by a third party), otherwise the sample should have a minimum of 10 people, or 10% of the total, whichever number is the highest)</i></p> <p>The Auditor sampled [] people out of the total of [] people.</p>		

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
A.1	PERSONNEL COSTS <u>For the persons included in the sample and working under an employment contract or equivalent act (general procedures for individual actual personnel costs and personnel costs declared as unit costs)</u> To confirm standard factual findings 1-5 listed in the next column, the Auditor reviewed following information/documents provided by the Partner: <ul style="list-style-type: none"> ○ a list of the persons included in the sample indicating the period(s) during which they worked for the action, their position (classification or category) and type of contract; ○ the payslips of the employees included in the sample; ○ reconciliation of the personnel costs declared in the Financial Statement(s) with the accounting system (project accounting and general ledger) and payroll system; ○ information concerning the employment status and employment conditions of personnel included in the sample, in particular their employment contracts or equivalent; ○ the Partner's usual policy regarding payroll matters (e.g. salary policy, overtime policy, variable pay); ○ applicable national law on taxes, labour and social security and ○ any other document that supports the personnel costs declared. The Auditor also verified the eligibility of all components of the retribution (see Article 5 SGA) and recalculated the personnel costs for employees included in the sample.	1) The employees were i) directly hired by the Partner in accordance with its national legislation, ii) under the Partner's sole technical supervision and responsibility and iii) remunerated in accordance with the Beneficiary's usual practices.	
		2) Personnel costs were recorded in the Partner's accounts/payroll system.	
		3) Costs were adequately supported and reconciled with the accounts and payroll records.	
		4) Personnel costs did not contain any ineligible elements.	
		5) There were no discrepancies between the personnel costs charged to the action and the costs recalculated by the Auditor.	
	<i>Further procedures if 'additional remuneration' is paid</i> To confirm standard factual findings 6-9 listed in the next column, the Auditor: <ul style="list-style-type: none"> ○ reviewed relevant documents provided by the Partner (legal form, legal/statutory 	6) The Partner paying "additional remuneration" was a non-profit legal entity.	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	<p>obligations, the Partner's usual policy on additional remuneration, criteria used for its calculation...);</p> <ul style="list-style-type: none"> recalculated the amount of additional remuneration eligible for the action based on the supporting documents received (full-time or part-time work, exclusive or non-exclusive dedication to the action, etc.) to arrive at the applicable FTE/year and pro-rata rate (see data collected in the course of carrying out the procedures under A.2 'Productive hours' and A.4 'Time recording system'). <p><i>IF ANY PART OF THE REMUNERATION PAID TO THE EMPLOYEE IS NOT MANDATORY ACCORDING TO THE NATIONAL LAW OR THE EMPLOYMENT CONTRACT ("ADDITIONAL REMUNERATION") AND IS ELIGIBLE UNDER THE PROVISIONS OF ARTICLE 5.2.A.1, THIS CAN BE CHARGED AS ELIGIBLE COST TO THE ACTION UP TO THE FOLLOWING AMOUNT:</i></p> <p>(A) <i>IF THE PERSON WORKS FULL TIME AND EXCLUSIVELY ON THE ACTION DURING THE FULL YEAR: UP TO EUR 8 000/YEAR;</i></p> <p>(B) <i>IF THE PERSON WORKS EXCLUSIVELY ON THE ACTION BUT NOT FULL-TIME OR NOT FOR THE FULL YEAR: UP TO THE CORRESPONDING PRO-RATA AMOUNT OF EUR 8 000, OR</i></p> <p>(C) <i>IF THE PERSON DOES NOT WORK EXCLUSIVELY ON THE ACTION: UP TO A PRO-RATA AMOUNT CALCULATED IN ACCORDANCE TO ARTICLE 5.2.A.1.</i></p>	<p>7) The amount of additional remuneration paid corresponded to the Partner's usual remuneration practices and was consistently paid whenever the same kind of work or expertise was required.</p>	
		<p>8) The criteria used to calculate the additional remuneration were objective and generally applied by the Partner regardless of the source of funding used.</p>	
		<p>9) The amount of additional remuneration included in the personnel costs charged to the action was capped at EUR 8,000 per FTE/year (up to the equivalent pro-rata amount if the person did not work on the action full-time during the year or did not work exclusively on the action).</p>	
	<p><i>Additional procedures in case "unit costs calculated by the Partner in accordance with its usual cost accounting practices" is applied:</i></p> <p>Apart from carrying out the procedures indicated above to confirm standard factual findings 1-5 and, if applicable, also 6-9, the Auditor carried out following procedures to confirm standard factual findings 10-13 listed in the next column:</p> <ul style="list-style-type: none"> obtained a description of the Partner's usual cost accounting practice to calculate unit 	<p>10) The personnel costs included in the Financial Statement were calculated in accordance with the Partner's usual cost accounting practice. This methodology was consistently used in all COSME actions.</p>	

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Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	costs;.	11) The employees were charged under the correct category.	
		12) Total personnel costs used in calculating the unit costs were consistent with the expenses recorded in the statutory accounts.	
		13) Any estimated or budgeted element used by the Partner in its unit-cost calculation were relevant for calculating personnel costs and corresponded to objective and verifiable information.	
	<p><u>For natural persons included in the sample and working with the Partner under a direct contract other than an employment contract, such as consultants (no subcontractors).</u></p> <p>To confirm standard factual findings 14-18 listed in the next column the Auditor reviewed following information/documents provided by the Partner:</p> <ul style="list-style-type: none"> the contracts, especially the cost, contract duration, work description, place of work, ownership of the results and reporting obligations to the Partner; the employment conditions of staff in the same category to compare costs and; any other document that supports the costs declared and its registration (e.g. invoices, accounting records, etc.). 	14) The natural persons reported to the Partner (worked under the Partner's instructions).	
		15) They worked on the Partner's premises (unless otherwise agreed with the Partner).	
		16) The results of work carried out belong to the Partner.	
		17) Their costs were not significantly different from those for staff who performed similar tasks under an employment contract with the	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
		Partner.	
		18) The costs were supported by audit evidence and registered in the accounts.	
	<u>For personnel seconded by a third party and included in the sample (not subcontractors)</u> To confirm standard factual findings 19-22 listed in the next column, the Auditor reviewed following information/documents provided by the Partner: <ul style="list-style-type: none"> ○ their secondment contract(s) notably regarding costs, duration, work description, place of work and ownership of the results; ○ if there is reimbursement by the Partner to the third party for the resource made available (in-kind contribution against payment): any documentation that supports the costs declared (e.g. contract, invoice, bank payment, and proof of registration in its accounting/payroll, etc.) and reconciliation of the Financial Statement(s) with the accounting system (project accounting and general ledger) as well as any proof that the amount invoiced by the third party did not include any profit. ○ if there is no reimbursement by the Partner to the third party for the resource made available (in-kind contribution free of charge): a proof of the actual cost borne by the Third Party for the resource made available free of charge to the Partner such as a statement of costs incurred by the and proof of the registration in the Third Party's accounting/payroll,; ○ any other document that supports the costs declared (e.g. invoices, etc.). 	19) Seconded personnel reported to the Partner and worked on the Partner's premises (unless otherwise agreed with the Partner).	
		20) The results of work carried out belong to the Partner.	
		<i>If personnel is seconded against payment:</i> 21) The costs declared were supported with documentation and recorded in the Partner's accounts. The third party did not include any profit.	
		<i>If personnel is seconded free of charge:</i> 22) The costs declared did not exceed the third party's cost as recorded in the accounts of the third party and were supported with documentation.	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
A.2	<p>PRODUCTIVE HOURS</p> <p>To confirm standard factual findings 23-28 listed in the next column, the Auditor reviewed relevant documents, especially national legislation, labour agreements and contracts and time records of the persons included in the sample, to verify that:</p> <ul style="list-style-type: none"> the annual productive hours applied were calculated in accordance with one of the methods described below, the full-time equivalent (FTEs) ratios for employees not working full-time were correctly calculated. <p>If the Partner applied method B, the auditor verified that the correctness in which the total number of hours worked was calculated and that the contracts specified the annual workable hours.</p> <p>If the Partner applied method C, the auditor verified that the ‘annual productive hours’ applied when calculating the hourly rate were equivalent to at least 90 % of the ‘standard annual workable hours’. The Auditor can only do this if the calculation of the standard annual workable hours can be supported by records, such as national legislation, labour agreements, and contracts.</p> <p><i>PARTNER'S PRODUCTIVE HOURS' FOR PERSONS WORKING FULL TIME SHALL BE ONE OF THE FOLLOWING METHODS:</i></p> <p><i>A. 1720 ANNUAL PRODUCTIVE HOURS (PRO-RATA FOR PERSONS NOT WORKING FULL-TIME)</i></p> <p><i>B. THE TOTAL NUMBER OF HOURS WORKED BY THE PERSON FOR THE PARTNER IN THE YEAR (THIS METHOD IS ALSO REFERRED TO AS ‘TOTAL NUMBER OF HOURS WORKED’ IN THE NEXT COLUMN). THE CALCULATION OF THE TOTAL NUMBER OF HOURS WORKED WAS DONE AS FOLLOWS: ANNUAL WORKABLE HOURS OF THE PERSON ACCORDING TO THE EMPLOYMENT CONTRACT, APPLICABLE LABOUR AGREEMENT OR NATIONAL LAW PLUS OVERTIME WORKED MINUS ABSENCES (SUCH AS SICK LEAVE OR SPECIAL LEAVE).</i></p> <p><i>C. THE STANDARD NUMBER OF ANNUAL HOURS GENERALLY APPLIED BY THE PARTNER FOR ITS</i></p>	<p>23) The Partner applied method [choose one option and delete the others] [A: 1720 hours] [B: the ‘total number of hours worked’] [C: ‘annual productive hours’ used correspond to usual accounting practices]</p>	
		24) Productive hours were calculated annually.	
		25) For employees not working full-time the full-time equivalent (FTE) ratio was correctly applied.	
		<i>If the Partner applied method B.</i>	
		26) The calculation of the number of ‘annual workable hours’, overtime and absences was verifiable based on the documents provided by the Partner.	
		<i>If the Partner applied method C.</i>	
		27) The calculation of the number of ‘standard annual workable hours’ was verifiable based on the documents provided by the	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	<p><i>PERSONNEL IN ACCORDANCE WITH ITS USUAL COST ACCOUNTING PRACTICES (THIS METHOD IS ALSO REFERRED TO AS 'TOTAL ANNUAL PRODUCTIVE HOURS' IN THE NEXT COLUMN). THIS NUMBER MUST BE AT LEAST 90% OF THE STANDARD ANNUAL WORKABLE HOURS.</i></p> <p><i>'ANNUAL WORKABLE HOURS' MEANS THE PERIOD DURING WHICH THE PERSONNEL MUST BE WORKING, AT THE EMPLOYER'S DISPOSAL AND CARRYING OUT HIS/HER ACTIVITY OR DUTIES UNDER THE EMPLOYMENT CONTRACT, APPLICABLE COLLECTIVE LABOUR AGREEMENT OR NATIONAL WORKING TIME LEGISLATION.</i></p>	<p>Partner.</p> <p>28) The 'annual productive hours' used for calculating the hourly rate were consistent with the usual cost accounting practices of the Partner and were equivalent to at least 90 % of the 'annual workable hours'.</p>	
A.3	<p>HOURLY PERSONNEL RATES</p> <p><u>D) For unit costs calculated in accordance to the Partner's usual cost accounting practice (unit costs):</u></p> <p>If the Partner has a "Certificate on Methodology to calculate unit costs " (CoMUC) approved by the Commission, the Partner provides the Auditor with a description of the approved methodology and the Commission's letter of acceptance. The Auditor verified that the Partner has indeed used the methodology approved. If so, no further verification is necessary.</p> <p>If the Partner does not have a "Certificate on Methodology" (CoMUC) approved by the Commission, or if the methodology approved was not applied, then the Auditor:</p> <ul style="list-style-type: none"> ○ reviewed the documentation provided by the Partner, including manuals and internal guidelines that explain how to calculate hourly rates; ○ recalculated the unit costs (hourly rates) of staff included in the sample following the results of the procedures carried out in A.1 and A.2. <p><u>II) For individual hourly rates:</u></p> <p>The Auditor:</p> <ul style="list-style-type: none"> ○ reviewed the documentation provided by the Partner, including manuals and internal 	<p>29) The Partner applied [<i>choose one option and delete the other</i>]:</p> <p>[Option I: "Unit costs (hourly rates) were calculated in accordance with the Partner's usual cost accounting practices"]</p> <p>[Option II: Individual hourly rates were applied]</p> <p><i>For option I concerning unit costs and if the Partner applies the methodology approved by the Commission (CoMUC):</i></p> <p>30) The Partner used the Commission-approved methodology to calculate hourly rates. It corresponded to the organisation's usual cost</p>	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	<p>guidelines that explain how to calculate hourly rates;</p> <ul style="list-style-type: none"> recalculated the hourly rates of staff included in the sample following the results of the procedures carried out in A.1 and A.2. <p><i>“UNIT COSTS CALCULATED BY THE PARTNER IN ACCORDANCE WITH ITS USUAL COST ACCOUNTING PRACTICES”:</i> <i>IT IS CALCULATED BY DIVIDING THE TOTAL AMOUNT OF PERSONNEL COSTS OF THE CATEGORY TO WHICH THE EMPLOYEE BELONGS VERIFIED IN LINE WITH PROCEDURE A.1 BY THE NUMBER OF FTE AND THE ANNUAL TOTAL PRODUCTIVE HOURS OF THE SAME CATEGORY CALCULATED BY THE PARTNER IN ACCORDANCE WITH PROCEDURE A.2.</i> <i>HOURLY RATE FOR INDIVIDUAL ACTUAL PERSONAL COSTS:</i> <i>IT IS CALCULATED BY DIVIDING THE TOTAL AMOUNT OF PERSONNEL COSTS OF AN EMPLOYEE VERIFIED IN LINE WITH PROCEDURE A.1 BY THE NUMBER OF ANNUAL PRODUCTIVE HOURS VERIFIED IN LINE WITH PROCEDURE A.2.</i></p>	<p>accounting practices and was applied consistently for all activities irrespective of the source of funding.</p>	
		<p><i>For option I concerning unit costs and if the Partner applies a methodology not approved by the Commission:</i></p> <p>31) The unit costs re-calculated by the Auditor were the same as the rates applied by the Partner.</p>	
		<p><i>For option II concerning individual hourly rates:</i></p> <p>32) The individual rates re-calculated by the Auditor were the same as the rates applied by the Partner.</p>	
A.4	<p>TIME RECORDING SYSTEM</p> <p>To verify that the time recording system ensures the fulfilment of all minimum requirements and that the hours declared for the action were correct, accurate and properly authorised and supported by documentation, the Auditor made the following checks for the persons included in the sample that declare time as worked for the action on the basis of time records:</p> <ul style="list-style-type: none"> description of the time recording system provided by the Partner (registration, authorisation, processing in the HR-system); its actual implementation; time records were signed at least monthly by the employees (on paper or electronically) 	<p>33) All persons recorded their time dedicated to the action on a daily/ weekly/ monthly basis using a paper/computer-based system. <i>(delete the answers that are not applicable)</i></p>	
		<p>34) Their time-records were authorised at least monthly by the project manager or other</p>	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	and authorised by the project manager or another manager; <ul style="list-style-type: none"> the hours declared were worked within the project period; there were no hours declared as worked for the action if HR-records showed absence due to holidays or sickness (further cross-checks with travels are carried out in B.1 below) ; the hours charged to the action matched those in the time recording system. <p><i>ONLY THE HOURS WORKED ON THE ACTION CAN BE CHARGED. ALL WORKING TIME TO BE CHARGED SHOULD BE RECORDED THROUGHOUT THE DURATION OF THE PROJECT, ADEQUATELY SUPPORTED BY EVIDENCE OF THEIR REALITY AND RELIABILITY (SEE SPECIFIC PROVISIONS BELOW FOR PERSONS WORKING EXCLUSIVELY FOR THE ACTION WITHOUT TIME RECORDS).</i></p>	superior.	
		35) Hours declared were worked within the project period and were consistent with the presences/absences recorded in HR-records.	
		36) There were no discrepancies between the number of hours charged to the action and the number of hours recorded.	
	<u>If the persons are working exclusively for the action and without time records</u> For the persons selected that worked exclusively for the action without time records, the Auditor verified evidence available demonstrating that they were in reality exclusively dedicated to the action and that the Partner signed a declaration confirming that they have worked exclusively for the action.	37) The exclusive dedication is supported by a declaration signed by the Partner's and by any other evidence gathered.	
B	COSTS OF SUBCONTRACTING		
B.1	The Auditor obtained the detail/breakdown of subcontracting costs and sampled [redacted] cost items selected randomly (<i>full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is highest</i>). To confirm standard factual findings 38-42 listed in the next column, the Auditor reviewed the	38) The use of claimed subcontracting costs was foreseen in Annex 1 and costs were declared in the Financial Statements under the subcontracting category.	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	<p>following for the items included in the sample:</p> <ul style="list-style-type: none"> the use of subcontractors was foreseen in Annex 1; subcontracting costs were declared in the subcontracting category of the Financial Statement; supporting documents on the selection and award procedure were followed; the Partner ensured best value for money (key elements to appreciate the respect of this principle are the award of the subcontract to the bid offering best price-quality ratio, under conditions of transparency and equal treatment. In case an existing framework contract was used the Partner ensured it was established on the basis of the principle of best value for money under conditions of transparency and equal treatment). <p>In particular,</p> <ol style="list-style-type: none"> if the Partner acted as a contracting authority within the meaning of Directive 2004/18/EC or of Directive 2004/17/EC, the Auditor verified that the applicable national law on public procurement was followed and that the subcontracting complied with the Terms and Conditions of the Agreement. if the Partner did not fall under the above-mentioned category the Auditor verified that the Partner followed their usual procurement rules and respected the Terms and Conditions of the Agreement.. <p>For the items included in the sample the Auditor also verified that:</p> <ul style="list-style-type: none"> the subcontracts were not awarded to other Partners in the consortium; there were signed agreements between the Partner and the subcontractor; there was evidence that the services were provided by subcontractor; 	<p>39) There were documents of requests to different providers, different offers and assessment of the offers before selection of the provider in line with internal procedures and procurement rules. Subcontracts were awarded in accordance with the principle of best value for money.</p> <p><i>(When different offers were not collected the Auditor explains the reasons provided by the Partner under the caption “Exceptions” of the Report. The Commission will analyse this information to evaluate whether these costs might be accepted as eligible)</i></p>	
		40) The subcontracts were not awarded to other Partners of the consortium.	
		41) All subcontracts were supported by signed agreements between the Partner and the subcontractor.	
		42) There was evidence that the services were provided by the	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
		subcontractors.	
C	COSTS OF PROVIDING FINANCIAL SUPPORT TO THIRD PARTIES		
C.1	<p>The Auditor obtained the detail/breakdown of the costs of providing financial support to third parties and sampled [] cost items selected randomly <i>(full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is highest).</i></p> <p>The Auditor verified that the following minimum conditions were met:</p> <ul style="list-style-type: none"> a) the maximum amount of financial support for each third party did not exceed EUR 60 000, unless explicitly mentioned in Annex 1; b) the financial support to third parties was agreed in Annex 1 of the Agreement and the other provisions on financial support to third parties included in Annex 1 were respected. 	43) All minimum conditions were met	
D	OTHER ACTUAL DIRECT COSTS		
D.1	<p>COSTS OF TRAVEL AND RELATED SUBSISTENCE ALLOWANCES</p> <p>The Auditor sampled [] cost items selected randomly <i>(full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is the highest).</i></p> <p>The Auditor inspected the sample and verified that:</p> <ul style="list-style-type: none"> ○ travel and subsistence costs were consistent with the Partner 's usual policy for travel. In this context, the Partner provided evidence of its normal policy for travel costs (e.g. use of first class tickets, reimbursement by the Partner on the basis of actual costs, a lump sum or per diem) to enable the Auditor to compare the travel costs charged with this policy; ○ travel costs are correctly identified and allocated to the action (e.g. trips are directly 	<p>44) Costs were incurred, approved and reimbursed in line with the Partner 's usual policy for travels.</p> <p>45) There was a link between the trip and the action.</p> <p>46) The supporting documents were consistent with each other regarding subject of the trip, dates, duration and reconciled with time records and</p>	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	linked to the action) by reviewing relevant supporting documents such as minutes of meetings, workshops or conferences, their registration in the correct project account, their consistency with time records or with the dates/duration of the workshop/conference; <ul style="list-style-type: none"> no ineligible costs or excessive or reckless expenditure was declared. 	accounting. 47) No ineligible costs or excessive or reckless expenditure was declared.	
D.2	<p>DEPRECIATION COSTS FOR EQUIPMENT, INFRASTRUCTURE OR OTHER ASSETS</p> <p>The Auditor sampled [] cost items selected randomly (<i>full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is the highest</i>).</p> <p>For “equipment, infrastructure or other assets” [from now on called “asset(s)”] selected in the sample the Auditor verified that:</p> <ul style="list-style-type: none"> the assets were acquired in conformity with the Partner's internal guidelines and procedures; they were correctly allocated to the action (with supporting documents such as delivery note invoice or any other proof demonstrating the link to the action) they were entered in the accounting system; the extent to which the assets were used for the action (as a percentage) was supported by reliable documentation (e.g. usage overview table); <p>The Auditor recalculated the depreciation costs and verified that they were in line with the applicable rules in the Partner’s country and with the Partner’s usual accounting policy (e.g. depreciation calculated on the acquisition value).</p> <p>The Auditor verified that no ineligible costs such as deductible VAT, exchange rate losses, excessive or reckless expenditure were declared (see Article 5 SGA).</p>	48) Procurement rules, principles and guides were followed. 49) There was a link between the grant agreement and the asset charged to the action. 50) The asset charged to the action was traceable to the accounting records and the underlying documents. 51) The depreciation method used to charge the asset to the action was in line with the applicable rules of the Partner's country and the Partner's usual accounting policy. 52) The amount charged corresponded to the actual usage for the action. 53) No ineligible costs or excessive or reckless expenditure were declared.	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
D.3	<p>COSTS OF OTHER GOODS AND SERVICES</p> <p>The Auditor sampled [] cost items selected randomly (<i>full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is highest</i>).</p> <p>For the purchase of goods, works or services included in the sample the Auditor verified that:</p> <ul style="list-style-type: none"> the contracts did not cover tasks described in Annex 1; they were correctly identified, allocated to the proper action, entered in the accounting system (traceable to underlying documents such as purchase orders, invoices and accounting); the goods were not placed in the inventory of durable equipment; the costs charged to the action were accounted in line with the Partner's usual accounting practices; no ineligible costs or excessive or reckless expenditure were declared (see Article 5 SGA). <p>In addition, the Auditor verified that these goods and services were acquired in conformity with the Partner 's internal guidelines and procedures, in particular:</p> <ul style="list-style-type: none"> if Partner acted as a contracting authority within the meaning of Directive 2004/18/EC or of Directive 2004/17/EC, the Auditor verified that the applicable national law on public procurement was followed and that the procurement contract complied with the Terms and Conditions of the Agreement. if the Partner did not fall into the category above, the Auditor verified that the Partner followed their usual procurement rules and respected the Terms and Conditions of the Agreement. <p>For the items included in the sample the Auditor also verified that:</p> <ul style="list-style-type: none"> the Partner ensured best value for money (key elements to appreciate the respect of this principle are the award of the contract to the bid offering best price-quality ratio, under conditions of transparency and equal treatment. In case an existing framework contract 	54) Contracts for works or services did not cover tasks described in Annex 1.	
		55) Costs were allocated to the correct action and the goods were not placed in the inventory of durable equipment.	
		56) The costs were charged in line with the Partner's accounting policy and were adequately supported.	
		57) No ineligible costs or excessive or reckless expenditure were declared. For internal invoices/charges only the cost element was charged, without any mark-ups.	
		58) Procurement rules, principles and guides were followed. There were documents of requests to different providers, different offers and assessment of the offers before selection of the provider in line with internal procedures and procurement rules. The purchases were made in accordance with the principle of best value for money.	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
	<p>was used the Auditor also verified that the Partner ensured it was established on the basis of the principle of best value for money under conditions of transparency and equal treatment);</p> <p><i>SUCH GOODS AND SERVICES INCLUDE, FOR INSTANCE, CONSUMABLES AND SUPPLIES, DISSEMINATION (INCLUDING OPEN ACCESS), PROTECTION OF RESULTS, SPECIFIC EVALUATION OF THE ACTION IF IT IS REQUIRED BY THE AGREEMENT, CERTIFICATES ON THE FINANCIAL STATEMENTS IF THEY ARE REQUIRED BY THE AGREEMENT AND CERTIFICATES ON THE METHODOLOGY, TRANSLATIONS, REPRODUCTION.</i></p>	<p><i>(When different offers were not collected the Auditor explains the reasons provided by the Partner under the caption “Exceptions” of the Report. The Commission will analyse this information to evaluate whether these costs might be accepted as eligible)</i></p>	
D.4	<p>AGGREGATED CAPITALISED AND OPERATING COSTS OF RESEARCH INFRASTRUCTURE</p> <p>The Auditor ensured the existence of a positive ex-ante assessment (issued by the EC Services) of the cost accounting methodology of the Partner allowing it to apply the guidelines on direct costing for large research infrastructures in Horizon 2020.</p> <p><i>In the cases that a positive ex-ante assessment has been issued (see the standard factual findings 59-60 on the next column),</i></p> <p>The Auditor ensured that the Partner has applied consistently the methodology that is explained and approved in the positive ex ante assessment;</p> <p><i>In the cases that a positive ex-ante assessment has NOT been issued (see the standard factual findings 61 on the next column),</i></p> <p>The Auditor verified that no costs of Large Research Infrastructure have been charged as direct costs in any costs category;</p> <p><i>In the cases that a draft ex-ante assessment report has been issued with recommendation for further changes (see the standard factual findings 61 on the next column),</i></p> <ul style="list-style-type: none"> The Auditor followed the same procedure as above (when a positive ex-ante assessment has NOT yet been issued) and paid particular attention (testing reinforced) to the cost items for which the draft ex-ante assessment either rejected the inclusion as direct costs for Large Research Infrastructures or issued recommendations. 	<p>59) The costs declared as direct costs for Large Research Infrastructures (in the appropriate line of the Financial Statement) comply with the methodology described in the positive ex-ante assessment report.</p>	
		<p>60) Any difference between the methodology applied and the one positively assessed was extensively described and adjusted accordingly.</p>	
		<p>61) The direct costs declared were free from any indirect costs items related to the Large Research Infrastructure.</p>	

Ref	Procedures	Standard factual finding	Result (C / E / N.A.)
E	USE OF EXCHANGE RATES		
E.1	<p>a) For Partners <u>with accounts established in a currency other than euros</u></p> <p>The Auditor sampled [] cost items selected randomly and verified that the exchange rates used for converting other currencies into euros were in accordance with the following rules established in the Agreement (full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is highest):</p> <p><i>COSTS INCURRED IN ANOTHER CURRENCY SHALL BE CONVERTED INTO EURO AT THE AVERAGE OF THE DAILY EXCHANGE RATES PUBLISHED IN THE C SERIES OF OFFICIAL JOURNAL OF THE EUROPEAN UNION (https://www.ecb.int/stats/exchange/eurofxref/html/index.en.html), DETERMINED OVER THE CORRESPONDING REPORTING PERIOD.</i></p> <p><i>IF NO DAILY EURO EXCHANGE RATE IS PUBLISHED IN THE OFFICIAL JOURNAL OF THE EUROPEAN UNION FOR THE CURRENCY IN QUESTION, CONVERSION SHALL BE MADE AT THE AVERAGE OF THE MONTHLY ACCOUNTING RATES ESTABLISHED BY THE COMMISSION AND PUBLISHED ON ITS WEBSITE (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm), DETERMINED OVER THE CORRESPONDING REPORTING PERIOD.</i></p>	62) The exchange rates used to convert other currencies into Euros were in accordance with the rules established of the Specific Grant Agreement and there was no difference in the final figures.	
	<p>b) For Partners <u>with accounts established in euros</u></p> <p>The Auditor sampled [] cost items selected randomly and verified that the exchange rates used for converting other currencies into euros were in accordance with the following rules established in the Agreement (full coverage is required if there are fewer than 10 items, otherwise the sample should have a minimum of 10 item, or 10% of the total, whichever number is highest):</p> <p><i>COSTS INCURRED IN ANOTHER CURRENCY SHALL BE CONVERTED INTO EURO BY APPLYING THE PARTNER'S USUAL ACCOUNTING PRACTICES.</i></p>	63) The Partner applied its usual accounting practices.	


[legal name of the audit firm]

[name and function of an authorised representative]

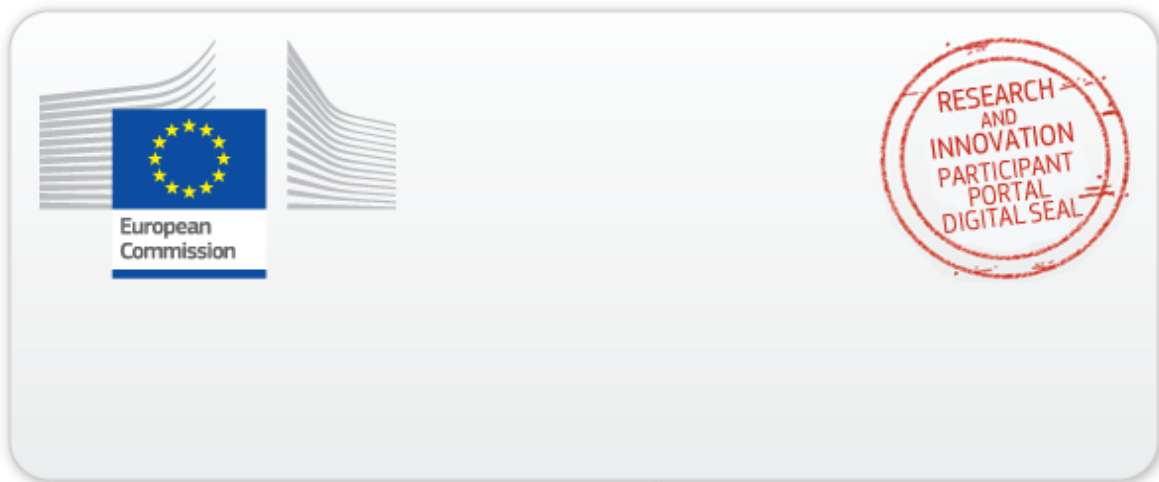
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Specific Grant Agreement number: [insert number] [insert acronym] [insert call identifier]

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