



**Contracting Authority
European Commission**

AL-INVEST IV
Guidelines
for grant applicants

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NOTICE

This translation to English is based on the original Spanish version. In the event of discrepancies, the original Spanish text will prevail.

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1. AL-INVEST IV

1.1 BACKGROUND

Since 1993, the AL-INVEST Programme has been facilitating the internationalisation of Latin American small and medium enterprises (SMEs) through the development of a network of Latin American and European business organisations providing business services and technical assistance. In a context of increasing globalisation, the Programme has, throughout its existence, sought to increase the participation of Latin America's SMEs in an ever more liberalised international trading system, as well as improve their international experience and know-how in collaboration with European partners.

Following a Pilot Phase (1993-1995), Phase I of AL-INVEST was carried out between 1996 and 2000. Initially, the Programme focused on aspects related to trade promotion. Emphasis was placed on business meetings (face-to-face meetings between European and Latin American companies), usually organised in the framework of an international fair, thanks to the collaboration between Eurocentres (Latin American business organisations and members of the Al-Invest Network), and European organisations representing the interests of European SMEs.

In light of the successes achieved in terms of company participation and business transactions concluded, the European Commission decided to finance a second phase of the Programme from 2000-2004.

The lessons learnt from Phase II demonstrated/emphasized the need to approach SME internationalisation processes in a more holistic manner. Consequently, the third phase of AL-INVEST (2003-2007), was more ambitious and the range of instruments (eligible activities) was considerably widened. Furthermore, the day-to-day management of the Programme was awarded to a consortium of Latin American and European business organisations that together formed the AL-INVEST network. Although business meetings continued to constitute the core of the Third Phase, a variety of services linked to the internationalisation of SMEs were supported: seminars, trade missions, technical assistance to conclude business transactions, as well as activities aimed at strengthening the institutional capacity of the business organisations implementing the Programme.

Despite the results achieved, a number of difficulties surfaced during the implementation of the Programme, due in part to an initial design that did not sufficiently take into account the diversity in size of the participating SMEs, their development, their inclination or ability to internationalise or their individual business needs. Furthermore, by rewarding efficiency and effectiveness in funding applications, the management of resources exacerbated the initial design flaws and created distortions in regards to the geographical distribution of Programme funds. In other words, by rewarding efficient and effective business organisations, weaker business organisations with arguably greater needs were largely overlooked.

Phase IV proposes solutions to the difficulties and distortions recorded and, what is more, takes into account the objectives and dispositions stipulated in the Regulation (EC) 1905/2006 of the European Parliament and the Council of the 18 December 2006, by which a financing instrument for Development Cooperation was established.

With the new legal basis in mind, Phase IV aims to fulfil two fundamental regional cooperation objectives with Latin America: to promote social cohesion and support regional integration. These will be tackled by supporting internationalisation processes for SMEs whose participation in foreign markets can result in benefits for local development as well as closer relations among Latin American countries.

The bridge foreseen between SMEs and business organisations of Latin America and Europe, which the Programme seeks to consolidate by building on past achievements, will facilitate an intense exchange of experience and sustained dialogue between the two regions, which will help identify common values and convergent interests.

1.2 OBJECTIVES OF THE PROGRAMME AND PRIORITY ISSUES

General Objective

To contribute to social cohesion in Latin America by strengthening small and medium enterprises (SMEs) of the region.

Specific objective

To support the strengthening and internationalisation of Latin American SMEs enabling them to take advantage of the opportunities offered by globalisation, regional integration and free trade agreements with the European Union and act as an engine for local development.

Strategy to fulfil objectives

The fourth phase of the AL-INVEST Programme aims to support SME internationalisation and consolidation processes in Latin America by effecting SME development policies endorsed by public and private, local, national and international organisations representing small and medium enterprises.

In particular, the Programme aims to:

- Benefit SMEs that directly participate in funded activities (micro level).
- Improve support instruments and SME development policies of the business organisations interested in the Programme (meso level).
- Contribute to SME internationalisation and consolidation processes that in turn improve local development in the communities concerned (macro level).

This new phase of AL-INVEST will enable applicants to flexibly combine any number of activities (instruments) to: internationalise Latin American SMEs, based on a careful analysis of the SMEs' needs in their respective geographical localities; pursue, insofar as SME development policies go, reciprocal learning processes between business organisations of Latin America and of the European Union that have an institutional mandate to support SMEs.

Said processes will be brought about by the following:

- The obligation established in the present Call to submit grant proposals covering diverse localities from different countries (which can itself lead to an interesting debate on different SME development policies);
- The establishment of regional networks of business organisations;
- The development of relations with European SME support organisations.

The Programme will be implemented through **3 grant proposals** awarded to groups of organisations belonging to three distinct geographical sub-regions of Latin America. EU organisations will be free to participate in any of these 3 groups of organisations.

The three financed actions will be supported by horizontal activities performed by a Coordination Unit. The Coordination Unit's functions and responsibilities which, amongst others include developing business organisations networks, will be set out in the Terms of Reference of the Call for Tender launched in parallel to the present Call for Proposals.

Said Coordination Unit will essentially provide services to the organisations executing the Actions and strive to foster synergies between the Programme's stakeholders.

Priorities

1. The Programme assumes that there are complex and diverse links between Latin American SME internationalisation processes and sustainable local development that vary according to the local contexts.

It is the existence of this link between local development and internationalisation that justifies a cooperation programme seeking to support internationalisation processes as its specific objective. At this stage of the Programme, the EC's interest lies in strengthening and internationalisation processes for companies that can drive and propel local development.

Considering the varying business conditions found in Latin America (in terms of different communities' business mix/make-up, their stage of development, their propensity to internationalise, the incidence of commercial sectors producing goods in high demand in foreign markets, etc.), the Programme's specific objective can only be achieved if the activities to be undertaken in each community are tailored to the specific needs and requirements of the SMEs that seek to participate in the global trading system.

Consequently, the Programme will not promote general and common activities to be implemented in all countries and in all situations. Neither will support be primarily focused on the final stage of the internationalisation process, i.e. the realisation of business transactions in foreign markets. Even though exports are still very important, sustainable internationalisation is today a substantially more complex process which considers factors that are fundamental in achieving competitiveness.

The Actions supported in the Programme will therefore facilitate diverse and specific internationalisation processes, in line with the needs of their respective geographical areas and commercial sectors. The Actions must contribute to solving problems and reducing difficulties faced by SMEs in reaching the levels of quality demanded by foreign markets.

From such considerations, there emerges a first group of priority criteria.

- **Priority will be given to Actions that:**

- **increase the number of internationalised SMEs;**
- **outline a set of activities (instruments) to adequately address specific problems/difficulties faced by SMEs in internationalisation processes;**
- **seek to support SME internationalisation processes that strengthen/drive local development.**

2. A second group of priority criteria refers to regional integration and the opportunities offered by the trade agreements between the European Union and the countries and sub-regions of Latin America which are currently in force or under negotiation.

Internationalisation processes can provide an important contribution to regional and sub-regional integration. The more inter-dependent the economies, the more easily the integration processes will take root.

The Association Agreements that are currently being negotiated with the sub-regional groups represent a window of opportunity that the SMEs of the countries concerned will be able to exploit if they have adequate support. It follows that:

- **Priority will be given to Actions that:**

- **contribute to strengthening internationalisation processes toward markets of countries with which there are economic integration agreements;**
- **offer the SMEs of the countries/sub-regions concerned the necessary tools to take advantage of the opportunities provided by Association Agreements that are negotiated with the EU.**

3. A third group of priority criteria is based on the following considerations:

- the Programme is co-financed with European Community funds;
- the European experience in SMEs support policies can be of great relevance and interest for the internationalisation processes of Latin American SMEs;
- European markets offer Latin American SMEs, possibilities to expand exports;
- institutions representing European and Latin American SMEs have a common interest in sharing experiences and know-how as well as in consolidating relations that increase commercial exchanges between the two regions.

Therefore, priority will be given to proposals that demonstrate a link with European experiences and markets.

- **Priority will be given to Actions that:**

- **clearly indicate how European business experience can be useful to internationalisation processes of the SMEs in the country/sub-region concerned;**
- **refer to sectors that have export potential toward EU markets;**
- **favour the development and internationalisation of SMEs which supply products (exportable to the EU) that embody traditional cultural values of the geographic areas concerned;**

4. A fourth group of priority criteria refers to the geographical representativeness of the proposal. The proposals will have to refer to sectors, groups of SMEs and territories (communities) that can be considered representative of the economic reality of a given country or sub-region. Excessive territorial concentration of the activities or disproportionate attention to a small number of SMEs will not be considered with priority.

- **Priority will be given to Actions that:**

- **cover territories, sectors and groups of SMEs representing the export potential of the country/region concerned;**
- **seek a geographical balance in the proposed activities;**
- **establish synergies with programmes/actions/measures that are already in place, so as to maximise impact.**

5. A last group of priority criteria refers to the need to link the proposal with other co-operation programmes (European Commission, EU Member States, International Organisations, etc.) as well as with national and sectoral policies already in place in the geographical areas concerned. Narrative on the possible synergies and means of integrating the Action in the ensemble of on-going policies and available instruments will be valued.

1.3 FINANCIAL ALLOCATION PROVIDED BY THE CONTRACTING AUTHORITY

1.3.1 Grants awarded

The overall indicative amount made available under this call for proposals is **EUR 40 million**. The Contracting Authority reserves the right not to award all available funds.

Proposals will only be financed if and when they fulfil the eligibility requirements indicated in the following points of this Guide as well as satisfying the priority criteria indicated above.

The grants will be awarded on the basis of the following distribution¹ criteria:

Argentina, Brazil, Uruguay, Paraguay, Venezuela & Chile: up to **EUR 15 million** for a single Grant covering the countries that together constitute Mercosur & Chile. The Proposal must clearly indicate the

¹ The above-mentioned criteria take into consideration the absorptive capacity demonstrated by each country in the previous phases of AL-INVEST as well as the greater needs of less developed countries.

financial distribution of the Grant by country. Said distribution may vary from a minimum of EUR 1.25 million to a maximum of EUR 5 million per country.

Mexico, Panama, Cuba & SICA (Central America Integration System: Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua): up to **EUR 14 million** for a single Grant covering the countries that together constitute SIECA, Mexico, Panama & Cuba. The Proposal must clearly indicate the financial distribution of the Grant by country. Said distribution may vary from a minimum of EUR 1 million to a maximum of EUR 5 million per country.

Andean Community (Bolivia, Colombia, Ecuador, Peru): up to **EUR 11 million** for a single Grant covering the countries that together constitute the Andean Community. The Proposal must clearly indicate the financial distribution of the Grant by country. Said distribution may vary from a minimum of EUR 1.4 million to a maximum of EUR 4 million per country.

The distribution of funds internal to each Grant, may be modified from the third year of activity on the basis of needs and real expenditure. However, any change in the distribution of funds must respect the minimums and maximums set out above and will be subject to approval by the EC.

Grants shall not be less than **50% or more than 80% of the total eligible costs of each Action** (See section 2.1.4). The balance will be financed by the Applicant, its partners, or from sources unconnected to the European Community's budget.

The above-mentioned amounts are the maximum amounts for sub-regional groups. The Contracting Authority reserves the right not to award all available funds.

1.3.2 Financing of Horizontal Services

The Grant Beneficiaries will be required to actively collaborate with the Coordination Unit of the Al-Invest Programme, which will be entirely funded by the EC by means of a service contract.

Considering that such horizontal services can affect the very design and formulation of the (Grant) Proposal, an indicative list of the services offered are hereby summarised²:

The Contractor of the Al-Invest IV Programme service contract of will provide, in the framework of the European Commission's directions, the following services:

- **Technical assistance services for the Actions that require and request them.** Amongst others, these include: methodological support in the implementation of the Action; identification of experts for the realisation of specific activities, market studies, etc.
- **Support services to ensure optimal Programme execution.** Amongst others, these include; identification and dissemination of the most effective methodologies concerning SME internationalisation processes; on-line training courses on EC's administrative and financial rules and regulations; identification and dissemination of indicators to measure Programme effectiveness and efficiency; dissemination of the results achieved by each Action and by the Programme as a whole; management of the AL-INVEST Programme's IT system; dissemination of information regarding the Programme in order to enhance Programme visibility; other relevant initiatives such as studies on specific problems, workshops, informative seminars, etc.
- **Services to enhance synergies between the Programme's Beneficiaries.** These activities will be key to enhancing mutual learning processes. The idea is to organise and develop a network of actors that

² For more information, please refer to the soon-to-be-launched Al-Invest IV Call for Tender to be published on DG EuropeAid's website.

support, in Latin America and the European Union, SME internationalisation programmes; organise annual meetings of the network members; encourage discussion and debate on the progress of the programme as well as on problems/challenges related to the internationalisation of Latin American SMEs in general.

- ***Services to foster bonds with the EU at the SME and business organisation levels.*** One of the main functions of the Coordinating Unit of AL-INVEST IV will be to consolidate SME and business organisation ties with the EU. At the end of the fourth phase of the Programme, the activities promoted by AL-INVEST should be sustainable, based on long-term mutual interests rather than on Community financing. The services provided could consist of organising business meetings and other means of participation in international trade fairs, if and when they correspond to Latin American SMEs' real needs.

2. RULES FOR THIS CALL FOR PROPOSALS

These guidelines set out the rules for the submission, selection and implementation of actions financed under this call, in conformity with the provisions of the Practical Guide to contract procedures for EC external actions, which is applicable to the present call (available on the Internet at the following address: http://ec.europa.eu/europeaid/work/procedures/index_en.htm).

2.1 ELIGIBILITY CRITERIA

There are three sets of eligibility criteria, relating to:

- Applicant(s) who may request a Grant (2.1.1), and their Partners (2.1.2),
- Actions for which a Grant may be awarded (2.1.3),
- Types of cost which may be taken into account in setting the amount of the grant (2.1.4).

2.1.1 *Eligibility of applicants: who may apply?*

(1) In order to be eligible for a grant, applicants **must**:

- be legal persons **and**
- be non profit making **and**
- be nationals³ of a Member State of the European Union or of those countries that fall within the scope of application of the Regulation by which a Financing Instrument of Development Cooperation⁴ is established **and**
- belong to one of the following categories:
 - public or private organisations that represent, promote and defend the general and sectoral interests of Latin American SMEs⁵, and routinely provide SME development services (eg. chambers of commerce, trade associations, development banks, etc.),
 - organisations that routinely provide trade promotion and SME internationalisation services to Latin American SMEs **and** are directly responsible, along with their Partners, for the preparation and management of the Action, and do not merely act as intermediaries **and**
- have legally been established for at least three years prior to the date of the submission of the Proposal **and**
- have adequate and stable sources of finance to ensure the implementation of the Action throughout its entire duration as well as to contribute to the Action's financing **and**

³ Nationality will be determined on the basis of the organisation's articles of incorporation which should demonstrate that it has been established in accordance with the prevailing law of the country concerned. In this respect, any legal entity whose articles of incorporation have been established in another country cannot be considered as an eligible local organisation, even if it is registered locally or boasts a "Memorandum of Understanding".

⁴ Regulation (EC)N° 1905/2006 of the European Parliament and the Council of 18 December 2006. Available at: http://ec.europa.eu/europeaid/work/procedures/documents/legislation/legal_bases/development_cooperation_en.pdf

⁵ It is understood that "Latin America" (LA) refers to the 18 countries that appear in Annex I of the Regulation (EC) N° 1905/2006 of the European Parliament and the Council of 18 December 2006: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay & Venezuela.

- assure jointly with their Partners, the minimum co-financing required throughout the lifecycle of the Action **and**
- have the capacity to manage actions of a scope similar to that of the Action for which the Grant application is made.

(2) Potential applicants may **not** participate in Call for Proposals or be awarded grants if they are in any of the situations which are listed in Section 2.3.3 of the Practical Guide to contract procedures for EC external actions (available at the following Internet address:

http://ec.europa.eu/europeaid/work/procedures/index_en.htm);

Potential applicants may not participate in the current Call for Proposals or apply for a grant if, by the deadline for the presentation of proposals of the present Call, they have on-going/unclosed projects financed under Phases I and/or II of the AL-INVEST Programme.

In part B section VI of the grant application form (“Declaration by the applicant”), applicants must declare that they do not fall into any of the situations.

2.1.2 Partnerships and eligibility of partners

Applicants who are eligible according to the conditions established in paragraph 2.1.1 will, if the proposals they present are finally selected, be the sole parties ("beneficiary") responsible to the Commission for the implementation of the Action.

Applicants must act with partner organisations as specified hereafter⁶.

Partners

In addition to the categories mentioned in paragraph 2.1.1, other institutions will be eligible as Partners:

- public or private organisations that represent, promote and defend the general and sectoral interests of European Union SMEs, and that routinely provide SME development services (eg. chambers of commerce, trade associations, development banks, etc.),
- organisations that provide trade promotion and SME internationalisation services to European Union SMEs,
- local governments and national ministries of Latin American and EU countries that promote policies that support the strengthening and internationalisation of SMEs.

Each Proposal must include, in addition to the Applicant, a minimum of one Partner per country of the sub-region concerned, which must belong to the categories as laid out in Section 2.1.1 herein. As a general rule, the number of partners must be able to adequately cover the territory of all countries of the sub-region concerned. There is no upper limit to the number of Partners in a given Proposal although the Beneficiary must consider the proper financial management of the Grant.

Applicants' Partners participate in designing and implementing the Action.

The costs they incur are eligible in the same way as those incurred by the Grant Beneficiary. They must therefore satisfy the same eligibility criteria as applicants.

If during the implementation phase a Partner withdraws from the Action, or if the need to increase the number of Partners is necessary for the successful implementation of the Action, Partners may be substituted or the total number of Partners may be increased following prior approval from the Commission.

⁶ Each and every partner must sign the Declaration of Association foreseen in the application form.

The following are not partners and do not have to sign the “partnership statement”:

- Associates

Other organisations may be involved in the Action. Such associates play a real role in the Action but may not receive funding from the grant with the exception of per diem or travel costs. Associates do not have to meet the eligibility criteria referred to in section 2.1.1. The associates have to be mentioned in Part B section IV - “Associates of the Applicant participating in the Action” of the Grant Application Form.

- Subcontractors

The grant beneficiaries have the possibility to award contracts to subcontractors. Subcontractors are neither partners nor associates, and are subject to the procurement rules set out in Annex IV to the standard grant contract.

The Applicant will act as the lead organisation and, if selected, as the contracting party (the "Beneficiary").

2.1.3 <i>Eligible actions: actions for which an application may be made</i>

Definition: An Action is composed of a set of coherent activities aiming to achieve a specific objective.

Proposed **Actions** will be considered eligible if:

1. Their ***objective is consistent with the Programme's specific objective***. This means that the activities proposed in the Action must be clearly aimed at strengthening internationalisation processes and be in line with the SME needs of the areas for which the grant application is made.
2. The ***Applicants explicitly state*** that they commit to collaborate with the Coordinating Unit of the Programme.
3. The ***final beneficiaries*** of the Action are Latin American small and medium enterprises (SMEs)⁷.

In the present Call, proposed activities will have to be presented in the form of Integrated Multi-Annual Plans of national scope.

Said Plans must provide detail in regards to the specific activities that will be carried out in the first year and a forecast of activities to be implemented in the following years. Furthermore, the distribution of activities and financing by country and Partner must be clearly indicated.

In order to facilitate comparative analysis, the above-mentioned Plans should be organised in the following manner:

A. Description of the setting of each country

- Issues related to the internationalisation⁸ of SMEs in the country (or sub-region) concerned. Trends, obstacles, most promising sectors, geographical distribution/concentration of the SMEs that are able or seek to internationalise.

⁷ Latin American SMEs may be eligible to participate in the Programme if and when they conform to the official, local definition of an SME.

⁸ For the purposes of the Programme, a broad definition of internationalisation will be used which includes a extensive set of coordinated actions that a company may undertake in order to access foreign markets (EU & LA) or to benefit from resources originating in foreign markets (EU & LA). Such actions include the following:

- Sales in foreign markets; presence established overseas (subsidiary, sales or franchise office);
- Adding value to goods, materials or resources in a country, to sell them overseas;
- Import/export;
- Cooperating with other companies (creating joint ventures, associations, consortia, clusters, networks);
- Direct investment, etc.

It is understood that internationalisation can be achieved through a gradual process whereby a company is increasingly committed to operating internationally. If part of a network, a company's internationalisation will be reflected in different ways & levels.

- Links between internationalisation processes, development and employment creation at the local level;
- Needs perceived by SMEs in relation to internationalisation processes;
- Factors that can lead to changes in the environment: EU-Latin America Association Agreements; public and private sector programmes; international cooperation programmes that aim to strengthen and consolidate SMEs and improve their competitiveness; prevailing economic conditions.

B. The proposed Action and its relation to the specific objective of the Programme:

- Objectives/goals of the activities;
- Types of SMEs to be assisted [size, degree of internationalisation (internationalised, internationalising, with internationalisation potential)];
- Commercial sectors selected⁹;
- Justification for selecting the geographical areas and sectors of intervention;
- Potential contribution to local development processes;
- Types of proposed activities and indicative relative weight of each activity in the budget;
- Links between the proposed activities and SMEs' perceived needs in regards to internationalisation processes;
- Geographical area and sector of intervention by Partner;
- Synergies of the proposed activities with public and private SME development policies and existing programmes;
- Segments of internationalisation processes that the proposed activities will focus upon (information; technical assistance to SMEs; (foreign) market research; technical assistance to conduct operations in foreign markets, development of different types of associativeness (consortia, networks, clusters, etc.);
- SMEs prospects in accessing foreign markets (especially markets of the EU);
- Expected participation in the Europe's principal trade fairs, indicating participation modality, business sectors and the approximate number of companies takingpart in each fair;
- Outline of the planned/sought collaboration and exchanges of experience with European organisations providing support to SMEs;
- Outline of the needs for technical assistance to be provided by the Coordinating Unit of the AL-INVEST Programme;

C. Expected results

- Outline of the Action's expected results in relation to internationalisation processes of the SMEs of the countries concerned. Such results must be measurable. To this end, the proposal must set out process, result

⁹ The Commission will give priority to non-traditional and innovative sectors with the potential to increase their relative trade flow weight. Priority will also be given to Proposals that support traditional cultural values and local products.

and impact indicators¹⁰ from the point of view of the Action's specific contribution to SME internationalisation.

The results identified will constitute a firm commitment to be fulfilled by the Applicant and its Partners, if the proposal is selected.

Duration

The planned duration of an Action may not be less than 36 months or exceed 48 months.

Location

Depending on the type of activity, activities will take place in one or more of the following countries: the eligible countries of Latin America - Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, El Salvador, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Uruguay, and Venezuela - or in the member states of the European Union.

Types of action

The activities that can be proposed in the Actions are those that facilitate internationalisation and consolidation processes for Latin American SMEs.

These activities may only directly benefit Latin American SMEs, even were they to be carried out in the European Union.

These can include, but shall not be limited to the following:

a) Activities to strengthen & consolidate SME competitiveness

i) Design

- Improve new and/or pre-existing goods and/or services;
- Improve the marketing and promotion of goods and services;
- Improve product management & design (needs analysis, design audits)

ii) Quality systems

- Develop standardisation processes (non-industrial)
- Set-up quality management systems
- Develop human resources

iii) Process innovation

- Provide technical assistance for carrying out needs analyses, incorporation of innovation processes and innovating management techniques/methods.
- Assess introduction/use of new technologies;
- Improve environmental impact management.

b) Activities to support internationalisation

i) Trade promotion: business meetings, participation in trade fairs, trade missions¹¹;

ii) Training and capacity building (seminars, workshops and other training activities) on subjects related to internationalisation: internationalisation strategies, technical standards, sanitary & phytosanitary regulations; importing/exporting procedures & norms.

¹⁰ Subsequent to the approval of the Proposal, the Commission through the Coordinating Unit, reserves the right to propose additional indicators to be measured in order to adequately assess the global impact of the Programme.

¹¹ Trade promotion activities in Europe, will be carried out through a service contract as foreseen in Section 1.3.2.

- iii) Technical assistance: business diagnostic analysis, conclusion of international business transactions, analysis of business cooperation prospects, development of business networks, consortia, etc.
- iv) Provision of information and advice on market opportunities, potential clients/business partners and EU legislation and policies.
- v) Investment promotion.
- vi) Activities to enhance female entrepreneurship.

c) Institutional building activities of intermediate business organisations in collaboration with Latin America and the European Union counterparts:

- i) Training activities.
- ii) Activities promoting the exchange of experiences.

d) Coordination activities with public institutions and cooperation programmes: of the European Commission (bi-lateral, regional) and other development cooperation organisations and institutions.

Actions which envisage financing activities that directly benefit SMEs or organisations of the European Union with Programme funds will not be considered eligible.

This distinction is made with a view to assuring that investments producing tangible or intangible assets are for the exclusive benefit of SMES or organisations of the countries of Latin America, as stipulated in Regulation (EC) N° 1905/2006 of the European Parliament and the Council of 18 December 2006.

The Commission will supervise the Programme Applicants and Partners' compliance with their administrative and financial obligations. It will regularly check and monitor the implementation of the activities so that potential difficulties can be anticipated and/or prevented and, taking into account the socio-economic impact of the Programme, the necessary rectifications made. The Commission will supervise the horizontal support services that will be implemented through the Coordinating Unit.

Evaluating the Action and measuring results

The proposed Action must necessarily foresee both mid-term and final evaluations.

The results of the Action in respect to the internationalisation of Latin American SMEs and the impact on social cohesion will need to be measurable. To this end, the proposals will have to establish process, result and impact indicators, that clearly demonstrate a contribution of the Action to SME internationalisation as well as to social cohesion more generally¹².

¹² In particular, the indicators to be measured include, but shall not be limited to, the following :

At the SME level:

- Exports of goods and services:
 - Total exports in relation to business turnover (exports/turnover).
 - Percentage of exports to EU & LA foreign markets.
- Investment:
 - Total direct investments in foreign markets.
 - Increase in direct investments in EU & LA foreign markets.
- Productivity: economic & financial indicators; human resources management and process indicators.
 - Import/use/access to technologies and know-how.
 - International collaboration activities.
- Employment (creation of decent work): understood to mean productive work for both women and men under conditions of freedom, safety and human dignity and in compliance with international labour regulations of the ILO.

At the Business Organisation level

- Efficiency: in the provision of support services for SMES.

The results identified will constitute a firm commitment to be fulfilled by the Applicant and its Partners, if the proposal is selected.

Financial support to third parties

In order to **support the achievement of the objectives of the Action** and in particular where the **implementation of the Action proposed by the Applicant requires financial support to be given to third parties**, the Applicant **may** propose awarding sub-grants.

In the case where the Applicant foresees the award of sub-grants, it must specify in its proposal the total amount of the grant which may be used for awarding sub-grants as well as the minimum and maximum amount which may be paid to third parties and the criteria for determining the exact amount for the sub-grant.

The maximum amount is limited to EUR 10.000 per third party of the sub-grant while the total amount which can be awarded as sub-grants to third parties is limited to EUR 100.000.

The list containing the types of activities which may be eligible for sub-grants under this Call for proposal must be submitted by the Applicant together with the submission of its proposal.

The following types of action are ineligible:

- actions concerned only or mainly with individual sponsorships for participation in workshops, seminars, conferences, congresses;
- actions concerned only or mainly with individual scholarships for studies or training courses;

Number of proposals and grants per applicant

An Applicant may not submit more than 1 proposal under this Call for Proposals.

An organisation (eligible as an "Applicant" or "Partner"), can only participate in **a single proposal**.

Nevertheless, eligible organisations as indicated in Section 2.1.1 (public or private organisations whose aim is to represent, promote and defend the general and sectoral interests of Latin American SMEs), may participate in up to 3 proposals (one per sub-region).

Consequently, EU organisations are authorised to provide support and services to all Latin American countries of each of the three sub-regions.

2.1.4 Eligibility of costs: costs which may be taken into consideration for the grant

Only "eligible costs" can be taken into account for a grant. These are detailed below. The budget is therefore both a cost estimate and a ceiling for "eligible costs". Note that the eligible costs must be based on real costs based on supporting documents (except for subsistence costs and indirect costs where flat-rate funding apply).

Recommendations to award a grant are always subject to the following condition: the checking process preceding the signing of the contract does not reveal problems requiring changes to the budget (for instance arithmetical errors, inaccuracies or unrealistic costs and other ineligible costs). The checks may give rise to requests for clarification and may lead the Contracting Authority to impose modifications or reductions to address such mistakes or inaccuracies. The amount of the grant and the percentage of co-financing as a result of these corrections may not be increased in any case.

It is therefore in the applicant's interest to provide a **realistic and cost-effective budget**.

Eligible direct costs

To be eligible under the call for proposals, costs must respect the provisions of article 14 of the General Conditions to the Standard Grant Contract (see Annex F).

Contingency reserve

A contingency reserve not exceeding 5% of the direct eligible costs may be included in the Budget of the Action. It can only be used with the **prior written authorisation** of the Contracting Authority.

Eligible indirect costs (overheads)

The indirect costs incurred in carrying out the action may be eligible for flat-rate funding fixed at not more than 7% of the total eligible direct costs, save where the beneficiary is in receipt of an operating grant financed from the Community budget.

Contributions in kind

Any contributions in kind, which must be listed separately in Annex III, do not represent actual expenditure and are not eligible costs. The contributions in kind may not be treated as co-financing by the Beneficiary.

The cost of staff assigned to the Action is not a contribution in kind and may be considered as co-financing in the Budget of the Action when paid by the Beneficiary or his partners.

Ineligible costs

The following costs are not eligible:

- debts and provisions for losses or debts;
- interest owed;
- items already financed in another framework;
- purchases of land or buildings, except where necessary for the direct implementation of the action, in which case ownership must be transferred to the final beneficiaries and/or local partners, at the latest by the end of the action;
- currency exchange losses;
- taxes, including VAT, unless the Beneficiary (or the Beneficiary's partners) cannot reclaim them and the applicable regulations do not forbid coverage of taxes;
- loans to third parties.

2.2 HOW TO APPLY AND THE PROCEDURES TO FOLLOW

Please note that the prior registration in PADOR¹³ for Applicants for this Call for Proposal is optional. However the applicant can register its organisation data, and upload supporting documents in PADOR.

OPEN CALL FOR PROPOSALS

2.2.1 *Application form*

Applications must be submitted using the application form annexed to these Guidelines (Annex A). This form includes guidance for concept note, which must also be drafted. Applicants should keep strictly to the format of the application and fill in the paragraphs and the pages in order. Please provide budget with round figures.

Applicants must apply in <English, Spanish or Portuguese>.

Please complete the application form carefully and as clearly as possible so that it can be assessed properly.

Any error related to the points listed in the Checklist (section V of part B of the grant application form) or any major inconsistency in the application form (e.g. the amounts mentioned in the budget are inconsistent with those mentioned in the application form) may lead to the rejection of the proposal.

Clarifications will only be requested when information provided is unclear, thus preventing the Contracting Authority from conducting an objective assessment.

Hand-written applications will not be accepted.

Please note that only the application form and the published annexes which have to be filled in (budget, logical framework) will be transmitted to the evaluators and assessors. It is therefore of utmost importance that these documents contain ALL relevant information concerning the action. **No supplementary annexes should be sent.**

2.2.2 *Where and how to send the Applications*

Applications must be submitted in a sealed envelope by registered mail, private courier service or by hand-delivery (a signed and dated certificate of receipt will be given to the deliverer) at the address below:

Postal address

European Commission
EuropeAid Co-operation Office

To the Attention of D. Vittorio TONUTTI

Unit B/2
J-54 4/38
Avenue du Bourget 1
B-1049 Brussels
Belgium

¹³ <http://ec.europa.eu/europaid/onlineservices/pador>

Address for hand delivery or by private courier service

European Commission
EuropeAid Co-operation Office

To the Attention of D. Vittorio TONUTTI

Unit B/2
J-54 4/38
Avenue du Bourget 1
B-1140 Brussels
Belgium

Applications sent by any other means (e.g. by fax or by e-mail) or delivered to other addresses will be rejected.

Applications must be submitted in one original and 3 copies in A4 size, each bound. The complete application form (part A: concept note and part B: full application form), budget and logical framework must also be supplied in electronic format (CD-Rom) in a separate and unique file (e.g. the application form must not be split into several different files) **in 5 copies (5 CD)**. The electronic format must contain **exactly the same** proposal as the paper version enclosed.

The Checklist (Section V of part B the grant application form) and the Declaration by the applicant (Section VI of part B of the grant application form) must be stapled **separately** and enclosed in the envelope.

The outer envelope must bear the **reference number and the title of the call for proposals**, together with the title [and number of the lot], the full name and address of the applicant, and the words "Not to be opened before the opening session".

Applicants must verify that their application is complete using the checklist (section V of part B of the grant application form). Incomplete applications may be rejected.

2.2.3 *Deadline for submission of Applications*

The deadline for the submission of applications to the above-mentioned address is **25 July 2008 at 16h00** local time Brussels, Belgium. Any application submitted after the deadline will automatically be rejected even if the postmark indicates a date prior to the deadline established or there is a delay attributable to the courier service.

In case of hand-deliveries, the deadline for receipt is at 16h00 local time Brussels, Belgium as evidenced by the signed and dated receipt.

Any application submitted after the deadline will automatically be rejected.

2.2.4 *Further information for Applications*

Questions may in addition be sent by e-mail [or by fax] no later than 21 days before the deadline for the submission of proposals to the addressee(s) listed below, indicating clearly the reference of the call for proposals:

E-mail address: europaaid-AL-INVEST@ec.europa.eu

Fax: 00-32-2-2998010

Replies will be given no later than 11 days before the deadline for the submission of proposals.

In the interest of equal treatment of applicants, the Contracting Authority cannot give a prior opinion on the eligibility of an applicant, a partner or an action.

Questions that may be relevant to other applicants, together with the answers, will be published on the internet at the EuropeAid website: http://ec.europa.eu/europeaid/work/procedures/index_es.htm and on the AL-INVEST Programme website: http://ec.europa.eu/europeaid/where/latin-america/regional-cooperation/AL-INVEST/index_en.htm

2.3 EVALUATION AND SELECTION OF APPLICATIONS

Applications will be examined and evaluated by the Contracting Authority with the possible assistance of external assessors. All actions submitted by applicants will be assessed according to the following steps and criteria:

(1) STEP 1: OPENING SESSION AND ADMINISTRATIVE CHECK

The following will be assessed:

- The deadline has been respected. If the deadline has not been respected the proposal will automatically be rejected.
- Application Form satisfies all the criteria mentioned in the Checklist (section V of part B of the grant application form). If any of the requested information is missing or is incorrect, the proposal may be rejected on that **sole** basis and the proposal will not be evaluated further.

Following the opening session and the administrative check, the Contracting Authority will send a letter to all applicants, indicating whether their application was submitted prior to the deadline, informing them of the reference number they have been allocated, whether they have satisfied all the criteria mentioned in the checklist and whether their Application Form has been recommended for evaluation¹⁴.

(2) STEP 2: EVALUATION OF THE CONCEPT NOTE

The evaluation of the Concept Notes that have passed the first administrative check will cover the relevance of the action, its merits and effectiveness, its viability and sustainability. The Contracting Authority reserves the right to skip the evaluation of the Concept Notes whenever considered justified (for example when a less than expected number of proposals are received) and to directly send invitations to submit a full proposal].

Please note that the scores awarded to the Concept Note are completely separate from those given to the Full Application.

The Concept Note will be given an overall score out of 50 points in accordance with the breakdown provided in the Evaluation Grid below. The evaluation shall also verify the compliance with instructions provided in the guidance for Concept Note, part A of the grant application form.

If the examination of the Concept Note reveals that the proposed action does not meet the eligibility criteria stated in paragraph 2.1.3, the proposal shall be rejected on this sole basis.

¹⁴ The deadline will ultimately depend on the number of proposals received.

The evaluation criteria are divided into headings and subheadings. Each subheading will be given a score between 1 and 5 in accordance with the following assessment categories: 1 = very poor; 2 = poor; 3 = adequate; 4 = good; 5 = very good.

	Scores	
1. Relevance of the action	Sub-score	15
1.1 Relevance of the problems to needs and constraints of the country/region to be addressed in general, and to those of the target groups and final beneficiaries in particular	5	
1.2 Relevance to the priorities and objectives mentioned in the Guidelines	5(x2)*	
2. Effectiveness and Feasibility of the action	Sub-score	25
2.1 Assessment of the problem identification and analysis	5	
2.2 Assessment of the proposed activities (practicality and consistency in relation to the objectives, purpose and expected results).	5(x2)*	
2.3 Assessment of the role and involvement of all stakeholders and proposed partners.	5(x2)*	
3. Sustainability of the action	Sub-score	10
3.1 Assessment of the identification of the main assumptions and risks, before the start up and throughout the implementation period.	5	
3.2 Assessment of the identification of long-term sustainable impact on the target groups and final beneficiaries.	5	
TOTAL SCORE		50

*the scores are multiplied by 2 because of their importance

Once all Concept Notes have been assessed, a list will be established with the proposed actions ranked according to their total score.

Firstly, only the Concept Notes which have been given a score of a minimum of 12 points in the category "Relevance" as well as a minimum total score of 30 points will be considered for pre-selection.

Secondly, the list of Concept Notes will be reduced in accordance to the ranking to those whose sum of requested contributions amounts to at least two times the available budget for this Call for proposals. The Evaluation Committee will subsequently proceed with the evaluation of the full proposals of the pre-selected applicants.]

(3) STEP 3: EVALUATION OF THE FULL APPLICATION

EVALUATION OF THE FULL APPLICATION

An evaluation of the quality of the proposals, including the proposed budget, and of the capacity of the applicant and his partners, will be carried out in accordance with the evaluation criteria set out in the Evaluation Grid included below. There are two types of evaluation criteria: selection and award criteria.

The selection criteria are intended to help evaluate the applicants' financial and operational capacity to ensure that they:

- have stable and sufficient sources of finance to maintain their activity throughout the period during which the action is being carried out and, where appropriate, to participate in its funding;
- have the management capacity, professional competencies and qualifications required to successfully complete the proposed action. This also applies to any partners of the applicant.

The award criteria allow the quality of the proposals submitted to be evaluated in relation to the set objectives and priorities, and grants to be awarded to actions which maximise the overall effectiveness of the call for proposals. They enable the selection of proposals which the Contracting Authority can be confident will comply with its objectives and priorities and guarantee the visibility of the Community financing. They cover such aspects as the relevance of the action, its consistency with the objectives of the call for proposals, quality, expected impact, sustainability and cost-effectiveness.

If the examination of the proposal reveals that the proposed action does not meet the eligibility criteria stated in paragraph 2.1.3, the proposal shall be rejected on this sole basis.

Scoring:

The evaluation criteria are divided into sections and subsections. Each subsection will be given a score between 1 and 5 in accordance with the following guidelines: 1 = very poor; 2 = poor; 3 = adequate; 4 = good; 5 = very good.

Evaluation Grid

Section	Maximum Score
1. Financial and operational capacity	20
1.1 Do the applicant and partners have sufficient experience of project management ?	5
1.2 Do the applicant and partners have sufficient technical expertise ? (notably knowledge of the issues to be addressed.)	5
1.3 Do the applicant and partners have sufficient management capacity ? (including staff, equipment and ability to handle the budget for the action)?	5
1.4 Does the applicant have stable and sufficient sources of finance ?	5
2. Relevance	25
2.1 How relevant is the proposal to the objectives and one or more of the priorities of the call for proposals? Note: A score of 5 (very good) will only be allocated if the proposal specifically addresses at least one priority . Note: A score of 5 (very good) will only be allocated if the proposal contains specific added-value elements, such as promotion of gender equality and equal opportunities...	5 x 2
2.2 How relevant to the particular needs and constraints of the target country/countries or region(s) is the proposal? (including avoidance of duplication and synergy with other EC initiatives.)	5
2.3 How clearly defined and strategically chosen are those involved (final beneficiaries, target groups)? Have their needs been clearly defined and does the proposal address them appropriately?	5 x 2
3. Methodology	25
3.1 Are the activities proposed appropriate, practical, and consistent with the objectives and expected results?	5
3.2 How coherent is the overall design of the action? (in particular, does it reflect the analysis of the problems involved, take into account external factors and anticipate an evaluation ?)	5
3.3 Is the partners' level of involvement and participation in the action satisfactory? Note: If there are no partners the score will be 1.	5
3.4 Is the action plan clear and feasible?	5
3.5 Does the proposal contain objectively verifiable indicators for the outcome of the action?	5
4. Sustainability	15

4.1 Is the action likely to have a tangible impact on its target groups?	5
4.2 Is the proposal likely to have multiplier effects ? (including scope for replication and extension of the outcome of the action and dissemination of information.)	5
4.3 Are the expected results of the proposed action sustainable : - financially (<i>how will the activities be financed after the funding ends?</i>) - institutionally (<i>will structures allowing the activities to continue be in place at the end of the action? Will there be local “ownership” of the results of the action?</i>) - at policy level (where applicable) (<i>what will be the structural impact of the action — e.g. will it lead to improved legislation, codes of conduct, methods, etc?</i>)?	5
5. Budget and cost-effectiveness	15
5.1 is the ratio between the estimated costs and the expected results satisfactory?	5
5.2 Is the proposed expenditure necessary for the implementation of the action?	5 x 2
Maximum total score	100

Note on Section 1. Financial and operational capacity

If the total average score is less than 12 points for section 1, the Evaluation Committee will reject the proposal.

Note on Section 2. Relevance

If the total average score is less than 20 points for section 2, the Evaluation Committee will reject the proposal.

Provisional selection

Following the evaluation, a table listing the proposals ranked according to their score and within the available financial envelope will be established as well as a reserve list following the same criteria.

Note: The scores awarded in this phase are completely separate from those given to the concept note of the same application.

(4) STEP 4: VERIFICATION OF ELIGIBILITY OF THE APPLICANT AND PARTNERS

The eligibility verification, based on the supporting documents requested by the Contracting Authority (see section 2.4) will only be performed for the proposals that have been provisionally selected according to their score and within the available financial envelope.

- The Declaration by the applicant (Section VI of part B the grant application form) will be cross-checked with the supporting documents provided by the applicant. Any missing supporting document or any incoherence between the Declaration by the applicant and the supporting documents may lead to the rejection of the proposal **on that sole basis**.
- The eligibility of the applicant, the partners, and the action will be verified according to the criteria set out in sections 2.1.1, 2.1.2 and 2.1.3.

Following the above analysis and if necessary, any rejected proposal will be replaced by the next best placed proposal in the reserve list that falls within the available financial envelope, which will then be examined for the eligibility of its applicant and the partners.

2.4 SUBMISSION OF SUPPORTING DOCUMENTS FOR PROVISIONALLY SELECTED PROPOSALS

Applicants who have been provisionally selected or listed under the reserve list will be informed in writing by the Contracting Authority. They will be requested to supply the following documents in order to allow the Contracting Authority to verify the eligibility of the applicants and their partners:¹⁵

1. The statutes or articles of association of the applicant organisation¹⁶ and of each partner organisation. Where the Contracting Authority has recognized the applicant's eligibility for another call for proposals under the same budget line within 2 years before the deadline for receipt of applications, the applicant may submit, instead of its statutes, copy of the document proving the eligibility of the applicant in a former Call (e.g: copy of the special conditions of a grant contract received during the reference period), unless a change in its legal status has occurred in the meantime.¹⁷

2. Copy of the applicant's latest accounts (the profit and loss account and the balance sheet for the previous financial year for which the accounts have been closed)¹⁸.

3. Legal entity sheet (see annex D) duly completed and signed by the applicant, accompanied by the justifying documents which are requested therein. If the applicant has already signed a contract with the Contracting Authority, instead of the legal entity sheet and its supporting documents the legal entity number may be provided, unless a change in its legal status occurred in the meantime.

4. A financial identification form conforming to the model attached at Annex E, certified by the bank to which the payments will be made. This bank must be located in the country where the applicant is registered. If the applicant has already signed a contract with the European Commission or where the European Commission has been in charge of the payments of a contract, a copy of the previous financial identification form may be provided instead, unless a change in its bank account occurred in the meantime.

The supporting documents requested must be supplied in the form of originals or photocopies of the said originals. However, the Legal entity sheet and the financial identification form must always be submitted in original.

Where such documents are not in one of the official languages of the European Union, a translation into one of the languages of the call for proposals of the relevant parts of these documents, proving the applicant's eligibility, must be attached and will prevail for the purpose of analysing the proposal.

Where these documents are in an official language of the European Union other than of the languages of the call for proposals, it is **strongly** recommended, in order to facilitate the evaluation, to provide a translation of the relevant parts of the documents, proving the applicant's eligibility, into one of the languages of the call for proposals.

If the supporting documents are not provided before the set deadline (15 calendar days from the receipt of the letter sent by the Contracting Authority), the application may be rejected.

Based on the verification of the supporting documents by the Evaluation Committee it will make a final recommendation to the Contracting Authority which will decide on the award of grants.

¹⁵ No supporting document will be requested for applications for a grant not exceeding EUR 25 000.

¹⁶ Where the applicant and/or (a) partner(s) is a public body created by a law, a copy of the said law must be provided

¹⁷ To be inserted only where the eligibility conditions have not changed from one call for proposals to the other.

¹⁸ This obligation does not apply to natural persons who have received a scholarship, nor to public bodies nor to international organisations. It does not apply either when the accounts are in practice the same documents as the external audit report already provided pursuant to section 2.4.2.

2.5 NOTIFICATION OF THE CONTRACTING AUTHORITY'S DECISION

2.5.1 Content of the decision

Applicants will be informed in writing of the Contracting Authority's decision concerning their application and the reasons for the decision.

Applicants believing that they have been harmed by an error or irregularity during the award process may petition to the Contracting Authority directly. The Contracting Authority must reply within 90 days of receipt of the complaint.

2.5.2 Indicative time table

	DATE	TIME*
Deadline for request for any clarifications from the Contracting Authority	4 July 2008	16h00
Last date on which clarifications are issued by the Contracting Authority	10 July 2008	-
Deadline for submission of Application Form	25 July 2008	16h00
Information to applicants on the opening & administrative check	1 August 2008*	-
Information to applicants on the evaluation of the Concept Notes	4 September 2008*	-
Information to applicants on the evaluation of the Full Application Form	30 September 2008*	-
Notification of award (after the eligibility check)	15 October 2008*	-
Contract signature	1 December 2008*	-

***Provisional date.** All times are in the time zone of the country of the Contracting Authority

2.6 CONDITIONS APPLICABLE TO IMPLEMENTATION OF THE ACTION FOLLOWING THE CONTRACTING AUTHORITY'S DECISION TO AWARD A GRANT

Following the decision to award a grant, the Beneficiary will be offered a contract based on the Contracting Authority's standard contract (see Annex F). By signing the Application form (Annex A), the applicant declares accepting, in case where it is awarded a grant, the Contractual conditions as laid down in the Standard Contract.

Implementation contracts

Where implementation of the action requires the Beneficiary to award procurement contracts, it must award the contract to the tenderer offering the best value for money, that is to say, the best price-quality ratio, in compliance with the principles of transparency and equal treatment for potential contractors, care being taken to avoid any conflict of interests. To this end, the Beneficiary must follow the procedures set out in Annex IV to the contract.

3. LIST OF ANNEXES

DOCUMENTS TO FILL IN

ANNEX A: GRANT APPLICATION FORM (WORD FORMAT)

ANNEX B: BUDGET (EXCEL FORMAT)

ANNEX C: LOGICAL FRAMEWORK (EXCEL FORMAT)¹⁹

ANNEX D: LEGAL ENTITY SHEET (EXCEL FORMAT)²⁰

http://ec.europa.eu/europeaid/work/procedures/index_en.htm

ANNEX E: FINANCIAL IDENTIFICATION FORM

DOCUMENTS FOR INFORMATION

ANNEX F: STANDARD CONTRACT (WORD FORMAT), available at the following address:
http://ec.europa.eu/europeaid/work/procedures/index_en.htm

ANNEX G: DAILY ALLOWANCE RATES (PER DIEM), available at the following address:
http://ec.europa.eu/europeaid/work/procedures/index_en.htm

ANNEX H: STANDARD CONTRIBUTION AGREEMENT, applicable in case where the beneficiary is an International organisation, is available at the following address:
http://ec.europa.eu/europeaid/work/procedures/index_en.htm

¹⁹ Optional where the total amount of the grants to be awarded under the call for proposals is EUR 100 000 or less.

²⁰ Only applicable where the European Commission is the Contracting Authority or will make the payments under the contracts to be signed.