

Interreg



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IPA Bulgaria – Serbia

(INTERREG VI-A) IPA BULGARIA SERBIA PROGRAMME

CCI 2021TC16IPCB007

**GUIDELINES FOR APPLICANTS WITH PROJECT PROPOSALS FOR
SERVICES OF GENERAL INTEREST**

Call for proposals

No 2021TC16IPCB007 – 2025 – 4

*under Priority 2 - Specific Objective 2.1. Fostering the integrated and inclusive
social, economic and environmental local development, culture, natural heritage,
sustainable tourism and security, in areas other than urban areas*

**DEADLINE FOR SUBMISSION OF THE PROJECT PROPOSALS IN JEMS
..... 2025, 17:00 EEST**

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INTRODUCTION

The ambition of the (Interreg VI-A) IPA Bulgaria-Serbia Programme 2021-2027 (hereafter “the Programme”, <https://ipa-bgrs.mrrb.bg/>) is to enhance territorial cohesion in the Bulgaria-Serbia cross-border region. The Programme aims to address territorial disparities, socio-economic imbalances, and the region’s overall low economic performance, which ranks among the lowest in the EU. To tackle these challenges, the Programme has established the priority “Integrated Development of the Border Region” and a dedicated Integrated Territorial Strategy (hereafter “the Strategy” <https://ipa-bgrs.mrrb.bg/en/term/15>). The Strategy falls within and reflects the strategic framework of the EU Policy Objective 5 “Europe closer to citizens” for the period 2021-2027. Therefore, it actively promotes the broad participation of local actors throughout the entire programme life cycle. It translates territorial needs and opportunities into targeted policy interventions by fostering a multisectoral approach to develop integrated solutions that address regional challenges and unlock development potential.

This call for proposals aims to contribute to the achievement **of Specific objective 1: “Expand and improve service provision”** and *M 1.1. Expand accessibility and improve quality of services of general interest in support of social and economic growth* of the Strategy. It is exclusively for organizations with experience in developing and providing services of general interest (SGIs). Overall, with the provided funding it is expected to reach jointly developed and implemented solutions that:

- Address service gaps in areas with low service intensity;
- Adapt to evolving population needs by ensuring faster access and higher-quality services that improve quality of life;
- Introduce innovative¹ and cohesive service models that reduce territorial disparities and promote balanced regional development.

The primary objective of this Guide is to facilitate interested organizations to develop and submit their project proposals for development and provision of SGIs within the territory of the Programme. Its area includes the following NUTS III regions:

- Bulgaria: districts Vidin, Montana, Vratsa, Sofia, Pernik, Kyustendil
- Serbia: districts Bor, Zaječar, Toplica, Nišava, Pirot, Jablanica, Pčinja.

For the 2021-2027 programming period, there are three key EU regulations, which rule the implementation of an Interreg programme, as follows:

- [Common Provisions Regulation](#) (EU) 2021/1060 - provides common framework for implementation of 8 EU funds complemented by fund-specific regulations;

¹ An innovative service of general interest refers to any service that is either entirely absent in the cross-border area or currently serves no more than 10% of the total CBC population, indicating very low service intensity.

- [Interreg Regulation](#) (EU) 2021/1059 – it is the fund-specific regulation for all Interreg programmes;
- [IPA III Regulation](#) (EU) 2021/1529 – provides framework for planning and delivering assistance to IPA countries

The bodies who are involved in the Strategy and the Programme management are the following:

- ❖ **Strategy Board (SB)** – the SB is a permanently acting bilateral partnership structure, without legal personality, set up in line with the provisions of Article 29 of the Interreg Regulation. The main task of the SB is to participate in the selection of projects funded under the Strategy. In addition to that, the SB has the overall responsibility for implementing, monitoring and evaluating the Strategy. The SB composes of members, chair and co-chair who are local experts from each of the partner country, representing different territorial stakeholders, who have participated in the development of the Strategy and currently operate in the programme area, such as public authorities and NGOs. A list of SB members is published on the programme website.
- ❖ **Operational Unit (OU) to the SB** - The OU carries out administrative tasks related to the work of the SB. The Joint Secretariat of the Programme assumes the functions of the OU.
- ❖ **Managing Authority (MA)** – Territorial Cooperation Management Directorate at the Ministry of Regional Development and Public Works of the Republic of Bulgaria is designated to perform the functions of the MA under (Interreg VI-A) IPA Bulgaria Serbia Programme. The MA bears the main responsibility for the effective and efficient implementation the programme and therefore fulfils a wide range of functions.
- ❖ **National Authority (NA)** – The Ministry of European Integration of Serbia is the counterpart for the MA and is in charge of the coordination of the Programme in Serbia. The NA supports the MA in the process of management and overall implementation of the programme.
- ❖ **Monitoring Committee (MC)** is formed of representatives of relevant national, regional and local authorities and stakeholders, including representatives of the MA, the NA and the European Commission. The MC regularly reviews the programme's implementation, provides recommendations for improvement, and determines the methodology and funding allocation for project proposals submitted by the MA.

The document is part of the "**Application Package for the Call for Services of General Interest**", which is available at: [\(WEB LINK\)](#). The application package consists of:

SPECIFICS OF THE CALL

Objectives of the call

The Territorial Strategy (TS) of the Programme pursues a common strategic objective, supported by two main specific objectives, as follows:

Strategic objective - “To enhance growth in all its aspects”

Specific objective 1 - “To expand and improve service provision”

Measure 1.1. - Expand accessibility and improve quality of services of general interest in support of social and economic growth

Specific objective 2 – “To enhance regional competitiveness, incl. in the area of tourism”

The objective of the present call is to collect project proposals that address identified territorial needs and capitalize on existing potentials to enhance cross-border service provision in line **only with specific objective 1**. This includes the development of new services, the improvement and adaptation of existing ones, and the introduction of innovative solutions that increase accessibility, efficiency, and quality. Proposals should focus on ensuring equal access to essential services, fostering social and economic cohesion, and leveraging technological advancements to complement infrastructural upgrades. Special attention will be given to initiatives that promote integrated, sustainable, and community-driven approaches to service delivery across the border region.

IMPORTANT

Proposals for cross-border service improvements are welcome across all sectors, with the exception of tourism and wildfire prevention, as these areas have already received dedicated programme support through previous calls.

The call provides equal support to the following areas, ensuring a balanced approach without prioritizing any single element:

- **Development and enhancement of services:** Establishing new cross-border services and upgrading existing ones to better address evolving territorial needs.
- **Integration of technological and infrastructural solutions:** Implementing digital tools, smart technologies, and infrastructure improvements to increase the availability, accessibility, affordability, quality, and safety of services.
- **Cross-sectoral and multi-stakeholder approaches:** Encouraging collaboration between public institutions and civil society to develop sustainable and efficient service models.

- **Capacity building and training:** Strengthening the skills and competencies of service providers to ensure effective and inclusive service delivery.
- **Innovative and sustainable models:** Testing and implementing new service delivery mechanisms that promote environmental, social, and economic sustainability.
- **Inclusive and equitable access:** Addressing disparities by ensuring services reach vulnerable groups, remote areas, and marginalized communities.

Eligibility conditions

Project partners

Project partners are divided into two types: Lead Partner (responsible for project communication and overall implementation) and Project Partner. Both partners need to fulfil the following eligibility conditions:

(1) National, regional, or local public authorities, including regional structures of central public authorities and statutory bodies, as well as central and regional offices or structures of central government institutions/administrations;

(2) Public equivalent body², which means any legal body:

a) Established for the specific purpose of meeting needs in the general interest³, not having an industrial or commercial character, and

b) Have legal personality, and

c) Financed, for the most part, by the state, or regional or local authorities, or other bodies governed by public law,*

* or is subject to management supervision by those authorities or bodies,

* or have an administrative, managerial or supervisory board, more than half of whose members are appointed by the state, regional or local authorities or by other bodies governed by public law

(3) Public and municipal enterprises⁴ authorized by law to provide SGI with at least 51% public/municipal capital, which are not in bankruptcy proceedings.

² Here, the “public equivalent body” means a “body governed by public law” as defined in Article 2, point 1 (4) of Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement

³ Needs in the general interest” refer to needs that cannot be met solely through market-driven goods and services. Instead, due to their importance to society, the State or Local Government chooses to provide them directly or maintain significant control over their delivery.

⁴ According to Art. 2. (1) of Public Enterprises Act, public enterprises shall be:

(4) Non-Governmental organizations, Associations of Local/Regional authorities and of other organisations,

(5) Legal Status of Project Partners: All project partners must be legally established organizations (legal entities) under the national legislation of the country in which they are located. An exception applies to subsidiary structures of local, regional, or national authorities. If such a structure does not have independent legal status, it can participate only if its parent organization officially assumes all legal and financial responsibilities on its behalf. In such cases, the legally established central organization shall act as the project partner and sign all contractual documents.

(6) Geographical Eligibility: All project partners must be registered and actively operating within the Programme area at least 3 years prior to the application. An exception of the geographical eligibility applies to national or regional public authorities whose legally defined area of competence extends to the Programme area, as well as to structures of central public authorities located within the Programme area that cannot be registered as legal entities—in such cases, the central authority shall serve as the project partner.

Project partners located outside the programme area but within Bulgaria and Serbia may also be eligible. However, their involvement must bring a clear benefit to the project (e.g., an NGO holding the copyright for a digital solution essential to the project), and their activities must be explicitly implemented in the cross-border area. Such participation is considered exceptional and must be duly justified. The adequacy and relevance of these partners will be assessed under the Partnership criterion of the Quality Assessment.

(7) Direct Responsibility: All project partners must be directly responsible for the preparation and management of project activities. They must not act as intermediaries or engage in any form of contractual relationship with each other. Subcontracting the development or the provision of the project SGI is not permitted.

(8) Competence: Each project partner must possess the necessary competence to implement the activities foreseen in the project. This means that the organization must be legally authorized, as per national legislation, to provide the services or undertake the activities proposed in the project. The scope of its competences must align with the nature of the project, ensuring compliance with relevant laws, regulations, and administrative requirements. This criterion is essential to guarantee the effective implementation and sustainability of project outcomes.

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1. commercial companies with more than 50 percent state/ municipal participation in the capital, or in which the State/ Municipality otherwise exercises a dominant influence;
 2. the subsidiaries of the commercial companies under item 1 and the enterprises under item 3, if through them, the State/ Municipality controls more than 50 percent of the voting assets / shares or otherwise exercises a dominant influence;
 3. the state-owned enterprises, established by special Acts, pursuant to Art. 62, Para. 3 of the Commercial Act.

📌 IMPORTANT

Criteria 4, 5, 6 and 7 must be fulfilled cumulatively.

The development and the implementation of the project proposal must include **at least one partner from each side of the border region. Maximum number of partners is 4** - 1 lead partner and 3 project partners. Interested organisations to apply are advised to carefully consider and rationalise the setup of the project partnership to make sure there is no partner who lacks expertise needed to address the identified challenge of the project proposal.

📌 IMPORTANT

Each **applicant** may participate in only **one project** proposal, either as a lead partner or a project partner.

Since project expenditures must be pre-financed by partners and are reimbursed only after verification, it is crucial that all project partners have sufficient financial capacity to carry out their respective activities.

All partners are expected to sign a Project Partnership Agreement outlining their respective rights and responsibilities. All signatures should appear on the same page at the end of the agreement. The signed agreement should be included as part of the application form. A template for the Project Partnership Agreement is provided in Annex 1 of this Guide. Partners may choose to incorporate additional provisions as needed.

Lead partner principle

The "lead partner principle" applies, meaning that one partner takes overall responsibility for the project. The lead partner oversees the administrative and financial management of the project and assumes full legal and financial liability. The lead partner must have the financial capacity to ensure the project's smooth implementation and cover any non-eligible expenditures related to the activities of all project partners. More information about the role and tasks of the Lead Partner is provided in the contract and in the Project Partnership Agreement template (Annex 1).

Project activities

The thematic scope of SGI project activities is broadly open, with the exception of tourism and wildfire prevention, as these areas have already been addressed in previous programme calls. What is most important is the demonstrated need for these activities and the commitment of organizations from both sides of the border to collaboratively address these needs using modern solutions.

Focus of project	Description
Including only soft component	It includes non-infrastructure activities aimed at developing and/or enhancing the provision of the SGI. Soft measures typically include stakeholder cooperation, service design, development of technological/digital solutions, capacity-building, training, awareness-raising, policy development, institutionalization, and other jointly developed and implemented actions and solutions that enhance the availability, accessibility, affordability, quality, and safety of the SGI without involving construction or physical investments
Including both soft component and investment component	It includes infrastructure works and/or supply of equipment/software/hardware necessary to develop and/or enhance the provision of the SGI.
Including only investment component	INELIGIBLE
Development, testing, and adoption of new SGI	This involves the design, pilot implementation, and institutionalization of new SGI to address identified territorial needs. It includes developing innovative (new for the entire cross-border region or a part of it) service models, testing their feasibility and impact, and ensuring their sustainable adoption within the cross-border region.
Upgrade of existing SGI	This focuses on enhancing existing SGI to improve their availability, accessibility, affordability, quality, and safety. It includes adapting service models to evolving territorial needs, integrating technological or infrastructural improvements, and implementing measures to ensure long-term sustainability and increased user benefits within the cross-border region
Including both development and adoption of new and upgrade of existing SGI	Ensuring high-quality, accessible, and sustainable SGI in the cross-border region requires a dual approach: fostering innovation through the development and adoption of new services while also upgrading and optimizing existing ones. In some cases, upgrading existing SGI may require the adoption of new solutions to enhance their availability, accessibility, affordability, quality, and safety. By supporting both aspects, the Programme ensures a comprehensive and balanced approach to strengthening service provision in the cross-border region.

👉 IMPORTANT

Irrespectively of the focus, project proposals must ensure wide and fair access to the proposed SGI, as acknowledged in the Treaty on the Functioning of the European Union (TFEU)⁵ and other key legal documents⁶. Additionally, projects solutions must ensure they “materialise” in the

⁵ Article 14 and Protocol nº 26 of the Treaty on the Functioning of the European Union

⁶ Article 36 of the Charter of Fundamental rights of the European Union

border region rather than stop at the level of the “paperwork”, which is often necessary but not sufficient.

Project proposals with investment component

Project proposals that include an investment component, i.e., those involving infrastructural improvements and/or purchasing equipment (supply), must adhere to the additional requirements outlined below.

📌 IMPORTANT

If the project involves construction activities, such as building new or rehabilitating existing infrastructure, these activities must be carried out exclusively on state-owned or municipal property. Only the property owner or a legal entity that has already acquired management rights for the specific property is entitled to contract the procurement and implementation of such construction activities. This entity must be a project partner. The legal authority to manage the property must be valid for a period that aligns with or exceeds the five-year durability requirement specified in Article 65 of the CPR Regulation, following the project's completion.

Exceptions to this rule apply only when components of technical infrastructure, supporting the construction or rehabilitation of core infrastructure, traverse private properties. This must be explicitly documented in the approved works documentation (e.g. Working Design and Building Permit). In cases where investment activities require passage through private land, a Consent of the owners of the private properties must be provided. This document must be issued in the original language and accompanied by an English translation — either as an original or a certified true copy of the original. The validity of this Consent must align with the 5-year durability period specified in Article 65 of the CPR Regulation, following the project's completion. Additionally, the project partner implementing construction must provide an Ownership Act or an equivalent document that establishes the same legal circumstances and holds the same legal validity. This document must be issued in its original language and accompanied by a translation into English, either as an original or a certified true copy of the original.

If a project proposal includes investment activities, it must include all legally required documents issued by third-party institution/s responsible for granting permits for the implementation of specific activities within the project's thematic scope. If permits are required by law but are not submitted with the project application, they will be requested during the selection process. However, applicants will be given a significantly shorter timeframe for submission compared to those who provide permits at the application stage. Failure to submit

the required permit within the specified timeframe will result in the project's exclusion from the selection process.

Project proposals with an investment component must also ensure mandatory contribution to the protection of the environment and/or provision of green and digital solutions to boost cross-border territorial potentials. Project actions must be in full accord with the DNSH principle⁷. To support applicants in this, all project partners foreseeing investments need to fill in **Annex 6 'Statement of Capacity and Compliance with the Principles for Investment'** and **Annex 7 'Climate proofing assessment'**. Additionally, applicants must incorporate measures for monitoring and controlling environmental impact (Attachment 3) in their project proposals. These measures are derived from the Environmental Impact Assessment (EIA) report of the Programme. According to the EIA report, project partners implementing works and/or supply activities must include such measures where relevant.

Overall, it is the sole responsibility of all applicants, regardless of the project's focus, to ensure that their proposals comply with all relevant environmental provisions stemming from applicable European, national, and regional environmental legislation, including any secondary acts.

Programme indicators

All project proposals should contribute to the following mandatory programme indicators:

- Output indicator **RC084 'Pilot actions developed jointly and implemented in projects'** - *design, develop, and test new or improved service models, delivery methods, or operational approaches that enhance the accessibility, quality, and efficiency of SGI in the cross-border region.*
- Output indicator **RC0116 'Jointly developed solutions'** – *focuses on creating a sustainable and replicable service or approach that is intended for long-term use beyond the project's implementation*
- Output indicator **RC074 'Population covered by projects in the framework of strategies for integrated territorial development'** - *number of people who will directly benefit from the project's implementation*
- Result indicator **RCR104 'Solutions taken up or up-scaled by organisations'** – *number of jointly developed SGI solutions that are adopted (taken up) and/or further improved and expanded (up-scaled) by organizations during the project's implementation. For instance, this may occur when a SGI developed within the project is replicated by other organizations providing services in different localities, thereby extending its impact beyond the initial project scope. Alternatively, this may occur when*

⁷ Please see the [Taxonomy Regulation](#), the [Technical guidance on the application of DNSH principle](#)) and the 'climate resilience' pillar of the climate proofing of infrastructure⁷ ([Technical guidance on the climate proofing of infrastructure](#)). Climate proofing is a process that integrates climate change mitigation and adaptation measures into the development of infrastructure projects. It enables European institutional and private investors to make informed decisions on projects that qualify as compatible with the Paris Agreement.

the project's SGI(s) are institutionalized by the organizations that participated in their development and pilot implementation.

Detailed definition of the indicators is provided in Attachment 4.

📌 **Setting Realistic Indicator Targets**

Applicants are strongly advised to set realistic and well-justified targets for all indicators. **Overestimated targets at the application stage may lead to undesirable outcomes during both project assessment and implementation.**

Targets should be based on sound reasoning, and applicants must be able to clearly explain and justify how they plan to achieve them. Setting ambitious but achievable targets is essential - not only for project success, but also for maintaining compliance during the implementation and evaluation stages.

📌 **IMPORTANT**

Projects with budgets between EUR 500,000 and EUR 1,000,000 must deliver **more than one** pilot actions (output indicator RCO84), jointly developed solutions (output indicator RCO116) and solutions taken-up (result indicator RCR104).

Projects with budgets below EUR 500,000 must deliver **at least one** pilot action (RCO84), jointly developed solution (RCO116), and solution taken up (RCR104).

Cross-border effect

Another important requirement that applicants must consider is the cross-border effect of the proposed SGI solutions, ensuring that they do not result in 'mirror' solutions. In the context of the programme, "cross-border effect" refers to the measurable outcome and added value that a proposed SGI solution brings to the entire cross-border area, rather than just mirroring similar actions on both sides of the border without real integration or cooperation.

A strong cross-border effect means that the SGI solution:

- **Addresses common challenges** shared by both countries.
- **Creates synergies** through joint development, implementation, and use.
- **Enhances connectivity** and cooperation between institutions, services providers or communities across the border.
- **Leads to sustainable benefits** that would not be achievable without cross-border collaboration

Cooperation criteria

According to the Interreg regulation (Article 23) “partners shall cooperate in the development and implementation of Interreg operations, as well as in the staffing or financing, or both, thereof.” Project partners from both participating countries must collaborate in at least two mandatory areas: **joint development** and **joint implementation**. Additionally, they must cooperate in at least one of the following: **joint staffing and/or joint financing**, as described below:

➤ **Joint Development:**

- The development of the project proposal must be a collaborative effort among all project partners.
- Applicants must describe this cooperation in the Application Form (AF).

➤ **Joint Implementation:**

- All project partners actively participate in project implementation, with clearly defined roles and responsibilities outlined in the AF and the Partnership Agreement.
- Activities should be interconnected rather than running in parallel, ensuring continuous collaboration between partners across the border.

➤ **Joint Staffing:**

- A dedicated project team is appointed to manage and implement the project.
- Team members must not have overlapping roles on either side of the border.
- Contingency measures should be in place to ensure the continuity of work in case of staff absence.
- Regular coordination and exchange of information among team members are essential for successful project execution.

➤ **Joint Financing:**

- A single, joint project budget is established, with funds allocated according to each partner's activities.
- The lead partner holds a unified project bank account for receiving EU funds.
- Payments from the MA are made to this account.
- The lead partner is responsible for administering and distributing funds among project partners, following the financial commitments outlined in the Partnership Agreement.

Horizontal principles

As outlined in Regulation (EU) No 2021/1060, horizontal principles are fundamental values that apply across all EU-funded projects, reinforcing the integrity of EU investments. All project proposals must explicitly address these principles and provide relevant justifications. The three key horizontal principles are:

(1) Sustainable Development: Aligned with the UN's Sustainable Development Goals⁸, the Paris Agreement and the DNSH⁹ principle, sustainability must be integrated into all project activities - from planning to implementation. Applicants must assess potential environmental, climate, and social impacts, ensuring contributions to nature-based solutions, climate mitigation, neutrality, and social cohesion. (Please complete **Annex 6** for DNSH compliance.)

(2) Equal Opportunities and Non-Discrimination: Projects must ensure fairness and non-discrimination¹⁰ across all activities, including recruitment, participation, and service delivery.

(3) Equality between Men and Women: Gender equality must be actively promoted in project activities. Applicants are encouraged to consult the ERNACT publication 'Women in European Cooperation projects'¹¹, which provides recommendations on improving the experiences of women in EU-funded initiatives.

Another important horizontal principle of the programme is the **New European Bauhaus (NEB) principle**, which is highly relevant and appropriate for projects envisaging infrastructural activities. NEB promotes a sustainable, inclusive, and aesthetically enriching built environment, accelerating the green transition in sectors like construction.

Three core values of NEB are:

- *Sustainability* - Circularity, zero pollution, biodiversity, and climate action
- *Aesthetics* – High-quality, innovative, and experiential design.
- *Inclusion* – Diversity, accessibility, and affordability.

Applicants should familiarize themselves with the NEB and apply its principles where relevant. More information is available at: https://europa.eu/new-european-bauhaus/index_en.

Furthermore, applicants must assess their project's impact on these horizontal principles by selecting:

✓ **Positive impact** – When the project actively contributes beyond standard requirements (explanation required).

– **Neutral impact** – When the project complies with existing regulations without additional contributions (explanation required).

✗ **Negative impact** – Not expected; however, if unavoidable, a justification must be provided.

⁸ <https://sdgs.un.org/goals>

⁹ EU Taxonomy Regulation, <https://eu-taxonomy.info/info/eu-taxonomy-overview> and <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX%3A52021XC0218%2801%29&%3Bfrom=EN>

¹⁰ EU Charter of Fundamental Rights, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:12012P/TXT>

¹¹ <https://www.ernact.eu/DocumentDetail.aspx?AttId=8228>

Simply following regulations is considered **neutral**, whereas projects must go beyond standard procedures to be deemed **positively impactful**.

Project budget and costs

The total budget available for this call is EUR 4 630 028 comprising:

- **EUR 3 935 523 from EU financial contributions (ERDF + IPA funds)**
- **EUR 694 505 from national contributions**

The ERDF/IPA co-financing rate is 85%, while the national contribution accounts for 15%. In Bulgaria, the national contribution is covered by the national budget, whereas in Serbia, it is provided directly by Serbian project partners.

Applicants may also provide additional own co-financing, which must be reflected in the project budget and will be subject to verification. For Serbian project partners, any additional own co-financing must be provided in addition to the mandatory 15% national contribution.

A detailed, economically justifiable, and consistent budget that aligns with the project activities is crucial for a successful proposal. A recommended approach is to first define project activities clearly before structuring the budget. While project development often requires iterations between goals, objectives, and activities, establishing the activity framework first helps achieve greater budget clarity.

The budget approach to Simplified Cost Options (SCOs)

All project partners should familiarize themselves with the Programme's financial management approach, which applies the Simplified Cost Options (SCOs) methodology. SCOs represent an innovative EU mechanism for grant reimbursement, shifting from actual cost verification to predefined cost methodologies based on process, outputs, or results.

Instead of reimbursing "real costs", SCOs allow expenditures to be covered based on transparent, predefined calculations, reducing the need for extensive financial documentation. This streamlines administrative processes, enabling a greater focus on achieving concrete outputs and results rather than on financial verification.

SCOs can take the following forms:

- **Flat Rate** – Certain categories of eligible costs calculated as a percentage of other eligible costs.
- **Lump Sums** – Fixed amounts allocated for specific activities.
- **Unit Costs** – Standardized maximum amounts per unit of eligible costs (e.g., fixed prices for specific goods or services).

By applying SCOs, project management shifts its focus from **financial auditing** to **project impact and policy objectives**, fostering more effective and results-driven project implementation.

The budget template, types and eligibility of costs

The budget template of a project proposal consists of seven budget categories (BC), as follows:

BC 1 Staff costs – These costs cover the remuneration of personnel involved in project implementation, including the project team (e.g., manager, coordinator, accountant, assistant) and permanent staff of project partners engaged in soft project activities (e.g., training, studies, research).

These costs will be reimbursed as a flat rate of up to 20% of the total eligible costs under BC 4, BC 5, and BC 6 from the respective partner's project budget. The exact percentage of the flat rate has to be determined by each project partner and remains unchanged for the entire project implementation period. For further details, please refer to Article 39 of the Interreg Regulation.

Project partners must ensure compliance with national legislation when appointing project team members. While partners are not required to submit proof of actual expenditures and payments for staff costs related to project management, they must provide an official document (e.g., an order) confirming the appointment and operational status of the project team once the project is contracted.

Further details on this requirement will be included in the Project Implementation Manual.

Example for the calculation of staff costs, where the flat rate is determined at 20%:

Reported eligible direct costs:

External expertise and service costs: 20.000 EUR

Equipment costs: 30.000 EUR

Costs for infrastructure and works: 50.000 EUR

Total: 100.000 EUR

Eligible Staff costs = 100.000 EUR * 20% = 20.000 EUR

BC 2 Office and Administrative Costs – Eligible office and administrative costs are defined in Article 40 of the Interreg Regulation. These costs will be reimbursed at a flat rate of up to 15% of staff costs. The exact percentage of the flat rate has to be determined by each project partner and remains unchanged for the entire project implementation period. No further justification or supporting documents are required from project partners.

BC 3 Travel and Accommodation Costs – This category covers travel and accommodation expenses exclusively for project staff involved in project management and implementation. Eligible types of travel and accommodation costs are outlined in Article 41 of the Interreg Regulation. These costs will be reimbursed at a flat rate of up to 15% of staff costs, with no additional supporting documents required from project partners. The exact percentage of the flat rate has to be determined by each project partner and remains unchanged for the entire project implementation period.

When using the flat rate, applicants do not need to provide a detailed travel and accommodation budget, as the calculation is done automatically by JEMS.

When developing the project proposals, it is important to ensure adherence to the following additional eligibility principles:

- The **duration of travel** should be directly linked to the event/meeting, and cannot exceed the period from the day before to the day after the event unless clearly justified and documented.
- The **maximum accommodation costs** and **daily allowances** must comply with national eligibility rules.
- **External experts and service providers' travel and accommodation expenses** must be declared under **BC 4 - External Expertise and Services Costs**.
- The most **economical transport options** should be used. Business or first-class tickets are **not eligible**. It is recommended to prioritize **environmentally friendly transportation** (e.g., train over flight, green public transport over taxis/cars).
- **Taxi costs** are eligible only when travelling to/from the airport/train station or to/from the event venue/hotel, and public transport is unavailable. The cost should be **duly justified**.
- **Car rental** is eligible only in exceptional, justified cases (e.g., when the event location is not accessible by public transport, or when renting a car is more cost-effective due to the number of travelers).
- **Cancellation fees** for travel and accommodation costs are eligible only in case of **force majeure**.

BC 4 - External Expertise and Services Costs – This category includes costs for expertise and services provided by entities or individuals outside the project partners, directly linked to the project and essential for its successful implementation. The scope of external support required will vary depending on the project's specific needs and objectives. All eligible cost types are specified in **Article 42** of the Interreg Regulation.

Costs associated with **external expertise** will be reimbursed based on **real costs**. All supporting documentation proving expenditures need to be presented at verification stage during the implementation of the project.

📌 IMPORTANT

Costs for event organization services can be reimbursed using either **unit costs** or **real costs**, depending on the choice of each project partner. JEMS allows flexibility, meaning two or more partners within the same project can choose for different budgeting approaches.

Unit costs for event organization are calculated based on event duration and number of participants:

- **€18.00 per participant** for **one-day events**
- **€73.00 per participant** for **multi-day events**

The unit costs cover the following expenses:

- Rental costs for meeting/exhibition halls, training venues, and conference facilities;
- Rental costs for equipment (e.g. translation and audio equipment);
- Vehicle rental for event participants (car, van, minibus, bus, etc.);
- Catering services (coffee breaks, refreshments, lunches, and dinners);
- Accommodation costs;
- Purchase of consumables and materials (e.g. paper, folders, cases, CDs);
- Printing costs for invitations, agendas, and presentations

Examples for using unit cost approach:

- * **Example for calculation of the amount for 1-day event per 20 participants:** 1 day x 20 participants = 20 units, 20 units x unit costs EUR 18 = total costs EUR 360
- * **Example for calculation of the amount for 2-day event per 20 participants:** 2 days x 20 participants = 40 units, 40 units x unit costs EUR 73 = total costs EUR 2 920

📌 IMPORTANT

For the sake of building equal and cohesive payment levels across the programme area, the gross fee-based remuneration for intellectual services contributing to the Call's indicators should not exceed a daily rate of €250. This amount includes all costs borne by both the project partner acting as a Contracting Authority and the Contractor.

BC 5 - Equipment Costs (part of the investment component)

This category includes procurement of tangible goods or physical items necessary for project implementation. Eligible equipment costs are outlined in Article 43 of the Interreg Regulation. The purchased equipment must be strictly linked to achieving the project's objectives. Procurement must comply with national regulations: Bulgarian partners must follow national public procurement rules, while Serbian partners must adhere to PRAG procurement rules. The Programme reimburses equipment costs based on real costs. All supporting documentation proving expenditures need to be presented at verification stage during the implementation of the project.

IMPORTANT

For planned supplies, a **market analysis** is required. The lead or project partner must obtain and present at least three solicited offers from independent providers, along with website references where available.

- The offers must be **comparable in terms of technical characteristics** and accompanied by a **uniform request for offer**.
- **Bulgarian partners** may, as an alternative to three offers, provide at least three extracts from national/EU public procurement systems for similar supplies with identical technical specifications.
- Budgeted expenditures derived from the market analysis should reflect the **average price** of the received offers/extracts.

Adjusting for Inflation & Price Instability:

- To account for future inflation and price fluctuations, the budgeted expenditures for works and supply **may be increased** based on the **average national inflation rate** over the last **three years** prior to application submission.
- The **maximum allowed increase** is **10%**.

Specialized Equipment Procurement:

For highly specialized equipment with a **limited pool of suppliers**, where traditional market research is **not feasible**, applicants must provide **historical data** from previous similar contracts to verify cost reasonability.

Ensuring Fair & Transparent Procurement:

- To maintain **fair competition**, project partners (acting as the **contracting authority** with the selected supplier) must **publicly disclose** all relevant information from the market consultation and historical data gathering (for specialized equipment only) on their **official**

website.

- This information will be an integral part of the **tender dossier**, ensuring transparency and fairness.

BC 6 - Costs for infrastructure and works (part of the investment component)

As specified in Article 44 of the Interreg Regulation, costs related to infrastructure and works are eligible for reimbursement. However, purchasing land and buildings is not eligible.

- The Programme will reimburse these costs based on real costs supported by relevant documentation.
- All supporting documentation proving expenditures need to be presented at verification stage.
- In Bulgaria, national public procurement rules must be fully respected and applied.
- In Serbia, the PRAG provisions must be duly followed.

Here is an **exemplary combination list of eligible project types and costs** for a SGI project proposal, demonstrating how **BC 5 (Equipment costs)** and **BC 6 (Works and/or Supply)** can be applied together or individually, always accompanied by a soft component:

Type of project	Budget category
Including only soft component	BC 1, BC 2, BC 3, BC 4, BC-5 , BC-6 , BC 7
Including both soft component and investment component	All budget categories, including BC 5 and/or BC 6
Including only investment component	Not possible

BC 7 - Project Preparation Costs (PPC)

Projects approved by the Programme’s Monitoring Committee and contracted by the MA are entitled to reimbursement for PPC in the form of a lump sum. However, projects that have already received financial support for preparation from other EU funding sources are not eligible.

Maximum PPC amount: For projects with planned costs under BC5 and/or BC6, the PPC is capped at EUR 12,000 per project proposal. For all other projects, the PPC is fixed at EUR 6 000.

Budgeting of Project Preparation Costs: The whole amount must be included in the lead partner’s budget at the application stage.

Fair cost-sharing: The partnership should fairly distribute the preparation costs among

partners. The allocation of PPC must be clearly specified in the Project Partnership Agreement (Annex 1).

Reimbursement process: The lump sum has to be added to the lead partner's reported expenditure in the first report and shall be verified and reimbursed to the lead partner.

PPC covers the following services:

- ✓ Consultancy and development of technical documentation (e.g., feasibility studies, detailed design, technical/work design stage drawings).
- ✓ Elaboration of the project proposal, application form, translation of documents, taxes, and other charges.
- ✓ Other necessary costs for submitting a valid application and contracting.

📌 IMPORTANT

The Lead partner must declare the PPC amount in the first project progress report (Content report) and first interim payment request (Finance Project report).

Eligibility of costs

The eligible and ineligible costs are set out in the Regulation (eu, euratom) 2024/2509 of the European parliament and of the council of 23 September 2024 on the financial rules applicable to the general budget of the Union (recast) (Financial Regulation), the Regulation (EU) 2021/1058 of 24 June 2021 (ERDF Regulation), the CPR Regulation and the Interreg Regulation.

When budgeting and incurring expenditures, project partners should follow this hierarchy of rules: EU regulations take precedence. If no specific provisions exist at the EU level, Programme rules apply. If neither EU nor Programme rules provide guidance, national or regional legislation should be followed. Finally, if no applicable rules exist at the previous levels, the partner's internal regulations may be applied.

Additional conditions

1. Rational Budgeting and Market Prices

All project costs should be budgeted rationally and based on market prices. Relevant supporting documents (as outlined in section 1.2.4 "Additional Documents Supporting the Full Project Proposals") must be provided at the application stage. However, expenditures related to flat rates, unit costs, and lump sums, where final costs are automatically derived or represent a fixed amount for a specific activity, are exempt from this requirement.

2. No Double Funding

Project costs must not be financed by other financial instruments. Double funding is strictly prohibited and will be checked during screening and contracting procedures.

3. Alignment with Project Work Plan

All project costs must align with the project work plan, ensuring that expenditures are explicitly linked to the planned activities, deliverables, and outputs.

Ineligible costs

- ❖ Interest on debt;
- ❖ The purchase of land and existing buildings;
- ❖ Second hand equipment;
- ❖ Fines, financial penalties and expenditure on legal disputes and litigation;
- ❖ Costs of gifts;
- ❖ Costs related to fluctuation of foreign exchange rate;
- ❖ In-kind contributions (including unpaid voluntary work);
- ❖ Project expenditure split among project partners (i.e. sharing of „common costs”);
- ❖ Consultant fees between partners for services and work carried out within the project;
- ❖ Contracting of employees of the partner organizations as external experts, e.g. as freelancers;
- ❖ Charges for national financial transactions;
- ❖ Other non-eligible expenditures according to EU and national legislation, Programme`s rules and Subsidy Contract;

State Aid

All project activities will be examined for compliance with state aid regulations. This assessment is conducted on a case-by-case basis, meaning that the applicability of state aid rules depends on the specific activities of each project. All project partners must fill in Annex 5 'De minimis State Aid Declaration'.

Activities of economic nature may only be financed under the de minimis rule. In this case, the provisions of REGULATION (EU) 2023/2831 of 13 December 2023 on the application of Articles 107 and 108 of the Treaty to de minimis aid must be followed. For more information, please consult Attachment 6 'De minimis FactSheet'.

VAT expenditure

Each project partner must take the respective national VAT legislation into consideration when budgeting project costs.

- **For Bulgarian partners:** The expenditures for VAT is eligible for operation where the VAT is non-recoverable under national VAT legislation. In the implementation phase of the project the project partners should be requested to provide the necessary documentation proving the VAT requested for reimbursement is non-recoverable under national VAT legislation.
- **For Serbian partners:** The expenditures for VAT is eligible for operations the total cost of which is below EUR 5 000 000 (including VAT). The respective national VAT legislation must

be taken into consideration when budgeting project costs by each project partner in the project proposal.

No-profit principle

Non-applicable for Non-governmental organizations (Article 195, par. 3, c) of Regulation 2024/2509).

This explanation of the no-profit principle ensures that EU-funded projects do not generate financial gains for beneficiaries beyond covering their actual, eligible costs. Here's a simplified breakdown of how it works:

- **EU & national co-financing cannot create a surplus for project partners** (i.e., total income from grants + revenues cannot exceed total eligible expenditures).
- If a project **generates revenue** from the grant during implementation of particular operation, the MA will **deduct this amount from the final grant payment** to prevent profit. Revenues can come from various sources, including:
 - **User fees** for services or infrastructure use.
 - **Rental income** from buildings or land.
 - **Penalties received** from subcontractors due to contract breaches.
 - **Bank interest** earned on pre-financing.
- Project partners must **track and report all revenues** and provide a declaration at the **final reporting stage**.

Commission decisions on infringement

In accordance with Article 22(i) of the Interreg Regulation, Interreg operations must not be directly affected by a reasoned opinion issued by the European Commission under Article 258 TFEU. Such an infringement procedure could jeopardize the legality and regularity of expenditure or the performance of operations. Therefore, before developing a project idea, partners are encouraged to check whether any active reasoned opinion affects their proposed activities in Bulgaria. A dedicated link is available to review ongoing infringement cases https://ec.europa.eu/atwork/applying-eu-law/infringements-proceedings/infringement_decisions/?lang_code=en&langCode=EN

If a reasoned opinion is in place, project partners are advised not to proceed with project development, unless there are clear indications that the infringement will be resolved before the project submission deadline specified in this Guide.

Currency exchange for budgeting purposes

Project costs budgeted in a currency other than EUR must be converted into Euro using the European Commission's monthly accounting rate applicable in the month of project proposal

submission. The official exchange rates can be found at:
http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm

Subcontracting Guidelines

- Project partners that are **public authorities** are required to adhere to the **Green Public Procurement (GPP) principle**. GPP is defined as 'a process whereby public authorities seek to procure goods, services, and works that have a reduced environmental impact throughout their life cycle compared to alternatives with the same primary function'¹².
- When procuring, **Bulgarian partners**, that are not public authorities, need to follow Government decree No. 4/2024 (*Постановление на Министерски съвет №4/ 11.01.2024 г. за определяне на правилата за разглеждане и оценяване на оферти и сключването на договорите в процедурата за избор с публична покана от бенефициенти на безвъзмездна финансова помощ от Европейските фондове при споделено управление*);
- When procuring, **Serbian partners** adhere to Annex II of the Financing Agreement between European Commission and Serbia. To support them in implementing tendering procedures, they are encouraged to use PRAG templates to ensure compliance with the provisions outlined in Annex II. Additional practical guidance on public procurement for Serbian partners will be detailed in the Project Implementation Manual.
- Subcontracting procedures must **not create an economic advantage** for any specific economic operator.
- Project partners must not act as intermediaries or engage in any form of contractual relationship with each other.

DEVELOPMENT OF THE PROJECT PROPOSALS

Applicants must carefully review the entire application package, available on the following websites:

- **Programme website:** <http://www.ipacbc-bgrs.eu/>
- **MA website:** <https://www.mrrb.bg/>
- **NA website:** <https://www.mei.gov.rs/eng/>
- **EU Structural Funds in Bulgaria website:** www.eufunds.bg

The application process is conducted exclusively through [JEMS](#); no paper documents are required at the application stage. Technical guidance on project application and submission is available in the JEMS Manual, accessible at <https://JEMS.interact-eu.net/manual/>.

¹² https://green-business.ec.europa.eu/green-public-procurement_en

Additionally, project partners may submit **substantive questions in writing** up to **14 calendar days before the submission deadline**. The **Operational Unit (OU)** will provide replies **no later than 7 calendar days before the submission deadline**.

Questions should be sent via email to the address listed below, clearly indicating the **reference of the Call for Proposals - No 2021TC16IPCB007 – 2025 – 4**:

E-mail: ma_ipacbc@mrrb.government.bg

All questions submitted by potential applicants, along with the corresponding answers, will be published on the Programme website: <https://ipa-bgrs.mrrb.bg/>

Project description

The following instructional guidelines provide recommendations on how to effectively describe and justify the SGI project proposal, ensuring a well-balanced presentation of content while adhering to the character limits in the JEMS application form.

C.1 Project overall objective

The overall objective should clearly articulate what the project aims to achieve in the long run and how it contributes to the Call's objective. Describe the core purpose of the project in a way that highlights its strategic importance. Ensure that the project objective is specific, measurable, and realistic within the given timeframe. Focus on the expected impact and how the project will address SGI identified needs or potentials in the programme area. Avoid vague or overly broad statements—concentrate on the added value your project will bring.

C.2 Project relevance and context

In this section, applicants need to explain why the project is needed, providing relevant background information, data, and references to policies or strategies that support its importance. Identify the key challenges or gaps the project seeks to address and demonstrate its alignment with regional, national, or EU priorities. If applicable, highlight how previous projects or initiatives have influenced this proposal. Make sure to emphasize the cross-border or territorial cooperation aspects, explaining why a joint approach is necessary and beneficial compared to separate national efforts.

Applicants are strongly encouraged to approach Section C.2.7 'How does the project build on available knowledge?' with a **strategic mindset**, as it plays a crucial role in demonstrating how the project benefits from existing knowledge and previous initiatives. This section is directly linked to the capitalisation of results, which is a key objective for Interreg programmes.

What is Capitalisation?

Capitalisation refers to **collecting, analysing, exchanging, and transferring/adapting good practices** from past projects and initiatives in a particular area of regional development policy. It ensures that newly funded projects **do not start from scratch**, but rather build upon

established findings, methodologies, and best practices. Interreg, along with other EU-funded initiatives, has already **invested substantial resources** in addressing services of general interest in a cross-border context. By integrating past knowledge into new project proposals, applicants can:

- ❖ **Enhance project relevance** by demonstrating continuity with past efforts.
- ❖ **Strengthen impact** by leveraging tested solutions instead of duplicating work.
- ❖ **Improve efficiency** by learning from previous challenges and adapting existing methodologies.
- ❖ **Foster synergies** by aligning with ongoing or completed initiatives, avoiding fragmentation.

Therefore, applicants are encouraged to explore the KEEP database (<https://www.keep.eu/>) for EU-funded projects in the service provision area, including the following additional resources:

- https://ec.europa.eu/regional_policy/policy/cooperation/european-territorial/cross-border-public-services_en - Study "Cross-border public services: CPS inventory analysis and policy recommendations"
- <https://archive.espon.eu/cps-2> - ESPON Cross-border Public Services 2.0 (CPS 2.0). At the bottom of the page, you will find an inventory of cross-border public services available in over 40 cross-border areas across Europe.

By carefully crafting this section, applicants can demonstrate a deep understanding of the service provision landscape and position their projects as valuable contributions to cross-border cooperation.

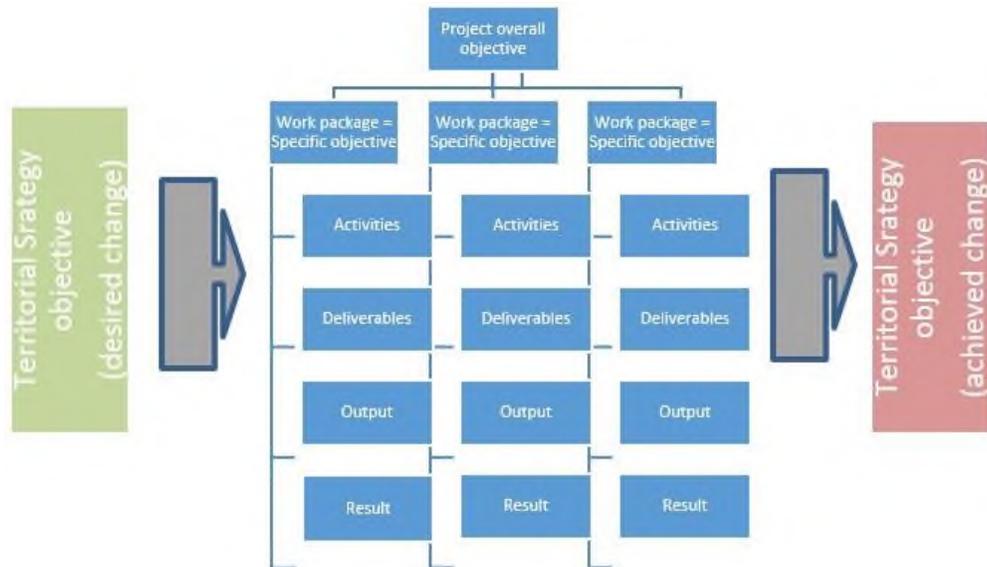
C.3 Project partnership

A strong partnership is essential for successful project implementation. Applicants need to clearly outline the role of each partner and why they are included. Demonstrate how their expertise, capacity, and responsibilities contribute to achieving project objectives. Ensure that the partnership is balanced in terms of expertise and workload. Explain how collaboration will be managed, ensuring effective coordination and communication among partners. If relevant, highlight any past cooperation experience that strengthens the credibility of the partnership.

C.4. Project work plan

C.4.1 Project intervention logic

A well-structured work plan should be based on a clear intervention logic, ensuring that all project elements are interconnected and contribute to the achievement of desired results. The following visual representation illustrates how each component of the project aligns with the Territorial Strategy.



Key concepts and their meanings:

- **Territorial Strategy objective** ⇒ Represents the thematic area that reflects the most relevant needs and opportunities of the target region. Projects must align their objectives with these strategic priorities;
- **Project overall objective** ⇒ Defines the long-term change in the service provision the project seeks to achieve for the communities in the cross-border area. This objective should be clear, ambitious yet realistic, and aligned with both the Territorial Strategy and the Programme objectives;
- **Project specific objective (work package)** ⇒ Specifies *what* the project aims to achieve during its implementation. Each specific objective is operationalized through a work package, which includes a set of activities designed to achieve the objective. The work plan (structured in work packages) details how the project will deliver its objectives. Work packages are not predefined by the Programme - applicants are free to structure them based on their project needs. However, they must be clearly linked to the specific objectives. Project management and communication activities should be integrated within relevant work packages rather than presented as a separate work package. This approach ensures consistency and avoids duplication, particularly with *sub-section C.4.3 (Communication Objectives and Target Audience)*.
- **Project activities** ⇒ Each work package consists of a series of activities aimed at achieving the related specific objective. Activities must be clearly defined and logically sequenced. To ensure efficiency and coherence, the number of activities per work package should be limited. Each activity should result in one or more deliverables.
- **Project deliverables** ⇒ Tangible evidence of what has been produced through an activity. Examples include reports, studies, action plans, digital tools, training modules, permits,

tender dossiers, etc. Deliverables contribute to project outputs. It is recommended to minimize the number of deliverables and design them as efficiently as possible to avoid unnecessary documentation.

- **Project outputs** ⇒ Direct products of project activities that contribute to the desired change. Outputs are defined at the work package level. The project's outputs must align with the Programme outputs, which are measured through predefined output indicators. The aggregated results of all project outputs contribute to achieving the Programme's overall output indicators. Not every work package needs to have an output—some projects may have only one main output. Outputs must be sustainable - they should remain in use by the project partners and/or target groups after the project ends. For specific examples of output indicators, refer to Attachment 4: Programme indicators fiches.
- **Project results** ⇒ Define the desired change in the identified service provision area achieved through the project. Results go beyond outputs - they represent societal benefits brought by the project. The project result must be coherent with the overall objective and should quantify the level of change expected within the project timeframe.
- **Project budget** - Project costs must be closely aligned with the project work plan, ensuring that all expenditures are clearly linked to planned: activities, deliverables, outputs.

IMPORTANT

A key horizontal principle shaping the implementation of the Programme is the integration of green and digital policies into every supported intervention. Each project must include a component that contributes to environmental protection, biodiversity conservation, or offers green and digital solutions. These elements are essential for ensuring that integrated territorial development in the cross-border region aligns with sustainability and digital transformation goals.

IMPORTANT

Applicants are strongly encouraged to design project proposals that foster genuine cross-border cooperation, rather than simply linking local actions through a common service. Stand-alone activities or investments that primarily serve local needs without a clear cross-border dimension do not align with the Programme's objectives. Instead, projects should focus on collaborative solutions that address shared challenges in a cohesive and integrated manner.

C.4.2 List of investments

Applicants submitting SGI proposals that include an investment component need to list and describe in more details project investments that will be delivered within the project.

IMPORTANT

Investment activities, including the construction of new infrastructure or the rehabilitation of

existing facilities, are eligible only when carried out exclusively on state-owned or municipal property.

Furthermore, the investment activities must align entirely with the environmental mitigation measures and indicators provided in the Attachment 3 'Measures for monitoring and control of the environmental impact'. Project partners are mandated to integrate these measures and indicators into their projects' work plans.

The investment description in the proposals should encompass a title, expected delivery period, justification (explaining the need for the investment, its cross-border relevance, who is benefiting from that investment and in what way), location of the physical investment, and investment documentation (including all technical requirements and permissions required according to respective national legislation).

📌 IMPORTANT

Applicants are solely responsible for ensuring that all submitted investment documentation fully complies with the relevant legal requirements, particularly regarding the acquisition of legally required permits issued by third-party institutions. If permits are mandated by law but not submitted with the project application, they will be requested during the selection process. However, applicants who do not provide the permits at the application stage will be given a significantly shorter timeframe to submit them. Failure to submit the required permits within this period will result in the project's exclusion from the selection process.

To avoid disqualification, applicants are strongly advised to carefully review all legally required investment documents and ensure their availability at the time of application submission.

Furthermore, applicants need to identify and describe in their proposals risk associated with the investment and suggest risks mitigation measures.

Additional detailed information regarding the documents that justify and support the investments in the SGI project proposals is provided below (see section 'Additional documents for submission').

C.4.3 Communication objectives and target audience

Communication is a fundamental component of every Interreg project, playing a crucial role in achieving project objectives and driving changes in the target audience's awareness and behavior. Notably, there is no dedicated communication work package in the Application Form. Instead, communication activities and objectives must be directly integrated into the work packages. This ensures that communication efforts are fully embedded within the project's overall strategy rather than treated as a separate, standalone element. Given the importance of communication, project partners are required to outline their communication approach in **Section C.7 of the Application Form**. Applicants are strongly encouraged to rethink

traditional communication methods and adopt a more modern, dynamic approach by leveraging the vast digital opportunities available today. Instead of relying on outdated practices, projects should focus on generating engaging digital content that enhances their territorial and social visibility.

A well-designed communication strategy should enable project partners to tell a compelling story, highlighting the value of European cooperation through their project. For inspiration, applicants may refer to the following resources: <https://www.interact-eu.net/communication-and-visibility/communication/harmonised-branding>

Here are additional practical guidelines:

- **Durable Plaques and Billboards:** In accordance with Article 36 of Regulation (EU) 2021/1059 and Annex IX of Regulation (EU) 2021/1060, project partners must install permanent plaques or billboards that are clearly visible to the public as soon as physical investment activities begin or equipment is installed. This applies to Interreg-funded operations where the total cost exceeds EUR 100,000 per partner.
- **Programme Branding:** All documents and communication materials intended for the general public or project participants must visibly display the Programme's branding elements, ensuring clear identification of the project's affiliation with the Interreg Programme.
- **Use of Programme Logo:** The official Programme/Interreg brand manual must be followed when applying the project logo on all materials. Proper use of branding ensures consistency and visibility across all communication efforts.
- **Eco-Friendly Promotional Materials:** In line with the Interreg VI-A IPA Bulgaria-Serbia Programme's Communication Strategy, any promotional materials (e.g., banners, gifts, gadgets) distributed during public events should preferably be environmentally friendly to promote sustainability.
- **Integration of Communication Activities:** Communication objectives and activities should be fully embedded within the work packages rather than treated as standalone actions. This ensures alignment with the project's overall strategy and maximizes outreach impact.
- **Language Considerations:** When addressing the general public or specific target groups, project communication should be conducted in the language of the participants. Where necessary, appropriate translation and/or interpretation services should be arranged to ensure accessibility and inclusivity.
- **Acknowledgment of EU Support:** All activities, including investment-related activities such as infrastructure works, equipment supply, and major project results, must visibly acknowledge EU co-funding. This includes:

- Displaying the European emblem alongside the funding statement: "Co-funded by the European Union."
- Ensuring that the statement is fully spelled out in both the operational language of the Programme and relevant local languages.
- Placing the funding statement next to the emblem in all materials.

By following these guidelines, applicants can ensure their project meets all necessary communication, branding, and visibility requirements while enhancing public awareness and recognition of EU support.

C.5 Project results

The Project Results section is critical in demonstrating the impact of your project. Applicants must clearly define the intended changes their project will bring to the cross-border region and how these results align with the Programme result indicator. Below are key guidelines to structure this section effectively:

- **Define Clear and Measurable Results** - Clearly describe the societal, economic, or environmental improvements the project aims to achieve, ensure results are realistic, measurable, and achievable within the project timeframe.
- **Ensure coherence with project objectives and outputs** - Results should directly stem from the project's activities, deliverables, and outputs. Each output should contribute to a tangible result - if an output does not lead to a measurable change, reconsider its relevance. Ensure results address the challenges and needs identified in the project proposal.
- **Consider cross-border added value** - The results should go beyond local benefits and demonstrate how they strengthen cross-border cooperation. For instance, answering the following question may help applicants describe their project results: *Would the expected results be possible without joint action?* Showcase how results address shared challenges and opportunities in the cross-border area.

C.6 Project time plan

The overview table is automatically generated from thematic work packages. It displays activities (length), deliverables (delivery period), outputs (delivery period) and results (delivery period). The time plan shows only periods, not months. The length of the periods is 3 months.

📌 IMPORTANT

Plan the deliverables regularly during the implementation period, do not cluster all of them in the final period.

C.7 Project management

Effective project management is essential for ensuring smooth coordination, strategic decision-making, and the successful delivery of project results. In addition to the activities outlined in the work plan, applicants must incorporate provisions for:

- **Project Coordination and Internal Communication:** Clearly define the roles and responsibilities of all partners, outlining decision-making procedures and internal communication strategies to ensure seamless collaboration.
- **Management Structures and Risk Mitigation:** Describe how project management will be implemented at both strategic and operational levels, including the setup of management bodies, responsibility distribution, and procedures for identifying and mitigating risks.
- **Quality Assurance and Monitoring:** Explain how the quality of deliverables and outputs will be monitored, including the responsible partner(s) and any mechanisms in place for ensuring high standards. If a project evaluation is planned, describe its purpose and scope.
- **Communication Management:** Detail how the project's communication strategy supports the achievement of project results. Outline key tactics, channels, and tools for engaging target audiences and explain how the communication coordinator will facilitate active contributions from all project partners.

Applicants should ensure that project management activities, while not explicitly listed in the work plan, are accurately planned and budgeted within the proposal.

C.8 Long-term plans

The Interreg Programme seeks to fund projects that generate lasting benefits for the cross-border region and its communities. Applicants must demonstrate how their project will maintain its impact beyond the implementation period, particularly regarding:

- **Ownership and sustainability of investments:** After project closure, project outputs—particularly those involving productive investments and infrastructure—must be maintained and used as intended.
- **Regulatory compliance:** In accordance with Article 65(1) of Regulation (EU) 2021/1060, project partners must ensure that for five years following the final payment, the funded investment does not:
 - Cease or transfer its productive activity outside the NUTS 2 region where it received support.
 - Change ownership in a way that grants undue advantage to a firm or public body.
 - Substantially alter the investment's nature, objectives, or implementation conditions, undermining its original purpose.

Applicants must outline how they will ensure compliance with these durability rules and describe plans for maintaining, managing, and further developing project results beyond the funding period.

IMPORTANT

In the event of non-compliance with this rule, the Programme Authorities will request reimbursement of the grant in proportion to the period of non-compliance¹³. Partners are required to inform the Programme Authorities of any non-compliance with this rule.

In more practical terms, the projects' lasting impact is viewed through three perspectives:

C.8.1 Ownership

To maximize the impact and long-term sustainability of project results, applicants must outline concrete actions to maintain, replicate, and integrate project outputs beyond the project's duration. The following guidelines will help ensure a strong and strategic approach:

- **Clearly identify the entities** (partner institutions, regional/national authorities, sectoral stakeholders) responsible for maintaining and further developing the project outputs and results.
- **Specify financial mechanisms** (e.g., public funding, private sector investment, integration into operational budgets) that will support the continuation of project results after funding ends.
- Where applicable, **outline governance structures** that will oversee long-term implementation.

C.8.2 Durability

The long-term durability of project outputs and results is of great importance for the programme. In this section of the Application Form applicants need to describe the concrete measures to ensure and/or strengthen the durability of the project outputs and results after project completion.

- Demonstrate **how project outputs/deliverables will be embedded** into the standard operations of the partner institutions.
- Describe the **mechanisms for formal adoption** (e.g., policy changes, agreements, integration into work processes).
- Where relevant, ensure **alignment with national/regional strategic frameworks** and sectoral policies.

¹³ This rule does not apply to a project partner, which undergoes cessation of a productive activity due to a non-fraudulent bankruptcy.

C.8.3 Transferability

All outputs and deliverables of supported projects must be transferable, replicable and adaptable within the Programme cooperation area enabling their use by other target groups or in different territories. Applicants are required to outline their actions to ensure that relevant groups are informed about the projects' outputs/deliverables and have the capability to utilize them.

- Outline how the **project's outputs will be replicated and expanded** to benefit additional users and territories within the Programme area.
- Highlight the **scalability and adaptability of project results**, ensuring that solutions can be adjusted to fit different regional/local contexts.
- Encourage **knowledge-sharing and exchange of best practices** to facilitate adoption by other institutions and stakeholders.

SUBMISSION OF PROJECT PROPOSALS

Main documents for submission

Applicants must submit their project proposals by in [JEMs](#). All sections of the application form must be completed, and it is the applicant's responsibility to ensure compliance.

As a general rule, all documents must be submitted in English. If a document has been translated from its original language into English, the original version must also be provided and verified as a 'true copy' for reference. Translated versions of documents take precedence and will be the ones considered for the screening of the project proposals. The attached documents may be scanned signed versions or electronically signed, but they must be accompanied by the respective signature certificate. Additionally, the e-signature must pertain to the legal representative of the project partner.

Electronic signatures are valid as long as they are accompanied by the corresponding signature certificate. However, the electronic signature must belong to the legal representative of the project partner and cannot be attributed to an individual without a formal legal affiliation with the project partner.

IMPORTANT

Detailed instructions for completing and submitting the entire application package of the project proposal is accessible at: <https://jems.interact-eu.net/manual/>.

Applicants should be aware that automatic pre-submission checks in JEMS do not guarantee that a submitted application form is complete and meets all eligibility criteria. The lead partner is ultimately responsible for ensuring that all eligibility requirements are met before the final submission.

Each applicant should **attach to their application form in JEMS the following mandatory annexes**, specifying the responsible party for their completion and signature (indicated in brackets):

- ✓ Annex 1 – Project Partnership Agreement;
- ✓ Annex 2 – Project Partner Declaration (all project partners)
- ✓ Annex 3 - Partnership and Co-Financing Statement (all project partners)
- ✓ Annex 4 – Declaration of e-mail address of the Lead Partner (only the Lead partner)
- ✓ Annex 5 – De minimis State Aid Declaration (all project partners)
- ✓ Annex 6 – Statement of Capacity and Compliance with the Principles for Investment (all partners foreseeing investments - works and/or supply)
- ✓ Annex 7 – Climate proofing assessment (partners foreseeing investments)
- ✓ Annex 8 - Justification for expenditures planned as a total amount under Budget Category 4 (all project partners with envisaged expenditures in BC4)
- ✓ Annex 9 – Declaration regarding the absence of circumstances under article 51 of Council Regulation (EU) No. 2022/576 of April 8, 2022, Amending Regulation (EU) No. 833/2014
- ✓ Any supporting documents, enabling the eligibility screening and the contracting conditions process. The list of these attachments is presented in the next sub-section '**Additional documents for submission**'.

Attachments for information and consideration:

Attachment 1 – Template of the application form

Attachment 2 – Draft Subsidy Contract (for information only)

Attachment 3 – Measures for monitoring and control of the environmental impact. Project partners are mandated to integrate these measures and indicators into their project proposals.

Attachment 4 – Programme's indicators fiches

Attachment 5 – Complaint procedure

Attachment 6 – FactSheet: State Aid and De minimis Provision

Attachment 7 – Grid for projects screening

Attachment 8 – Methodology for calculation of Service Impact Index

Attachment 9 - Grid for projects assessment

The Application Form, all annexes and listed below additional documents must be presented in scanned version or signed with qualified electronic signatures. For better flow, clarity, and

structure, it is recommended that all documents be archived thematically. This will help to facilitate the screening process and ensure that the team can easily find and screen the necessary information.

Additional documents for submission

Here are the additional documents based on which the eligibility screening of the project proposals is carried out:

1. Document indicating the legal status (for Serbian partners only)

For new partners from Serbia, documentary and other evidence of the most recent legal status should be provided, only if the information is not available in the official State register. These documents should be issued no later than 6 months before the submission of the SGI project.

In cases where the document does not specify the legal representative of the organization, an additional document (such as an act of appointment, order, decision, etc.) must be submitted, clearly indicating the name of the person with representative authority.

The document detailing the recent legal status should include:

- The date of establishment of the organization,
- The place of establishment (registration),
- The scope of territorial competence (if applicable).

If the issued document does not provide sufficient information on these circumstances, supplementary documents like the act of establishment or certificates from relevant authorities (Ministries, Agencies, Regional Administration, Inspectorates) can also be provided.

2. Decision/Letter of Acknowledgement/Letter of Support of the Managing body/Municipal Council/Board of Directors of each project partner

The required document type depends on the legal status of the project partner. However, this document should explicitly demonstrate the consent of the decision-making body of each partner to execute the proposed project and to ensure the sustainability of the project results for a period of five years following the completion of the implementation phase.

📌 IMPORTANT

Applicants should include the following statement in the Decision/Letter of Acknowledgement:

The [decision-making body] confirms that the project facility will not be subject to any complementary works that could potentially compromise or damage it during the five-year period following project completion. In the event that such works or incidents nonetheless

occur, the [decision-making body] commits to undertake all necessary measures to restore the proper functionality of the facility as quickly as possible, thereby ensuring the durability of the project results and avoiding any potential concerns related to the misuse of EU funds

Local Governments: When local governments act as project partners, the document must be issued by the respective Municipal Council to confirm their approval and support for the project. This requirement also applies to municipal enterprises.

Dual Authority: If the official representative of the project partner also holds decision-making authority within the organization, this document must be signed by another authorized representative from the same organization to ensure a clear division of roles and responsibilities.

Bulgarian partners as second-level budget administrators: They are required to submit a Letter of Support issued by the respective first-level administrator. This letter should explicitly state the support of the first-level administrator for the development, implementation, and sustainability of the project results for five years after the completion of the implementation period.

📌 IMPORTANT for SGI projects with investment component

In cases where the owner of the assets (buildings, facilities, machinery, equipment) subject to investment activities differs from the decision-making body of the project partner, a Consent of the Owner must be provided. This document must explicitly state that the owner grants the assets for free right of use for the purpose of the project for at least five years after the project's completion. The document must be signed and stamped by the legal representative of the owner and must clearly identify the assets, including their location and any relevant legal references confirming ownership.

2.1. Legalized mandates of delegation from the legal representatives of partners

When required, if the application form, annexed declarations, or project partnership agreement are not signed by the legal representatives of the Lead Partner or project partners. If the signatures are from a deputy by rights, the following documents must be provided:

- A document certifying the substitution by rights.
- The act of nomination for the person holding the deputy position.

When granting a mandate of delegation, the legal representative must present evidence that their delegation rights are unrestricted. The mandate must be legalized and duly signed by the legal representative.

3. Justification for expenditures planned as a total amount under Budget category 4.

Each project partner planning lump-sum expenditures under BC 4 must provide a detailed justification in English, signed by the legal representative or authorized person (Annex 8). The justification must include:

- ✓ Detailed description of the proposed activity.
- ✓ Calculation of expert input, including:
- ✓ Number and type of experts needed.
- ✓ Days/months of involvement.
- ✓ Remuneration unit rate.
- ✓ Detailed description of expected outcomes, including:
 - * Information on any printed materials (type, number of copies, number of pages).
 - * Price calculation.
 - * Any additional relevant information supporting the justification.

This justification ensures transparency and compliance with Programme financial rules.

4. Documents verifying legality and programme eligibility of project investments

☞ Applicable only for SGI projects with project costs under Budget Category 5 and or Budget Category 6

4.1 Ownership act or equivalent

4.1.1 Ownership Documentation for Tangible Assets:

Applicants must submit an ownership act, certificate, or legal document proving municipal or state-owned property status for tangible assets intended for works activities. The document must demonstrate that the project partner responsible for the investment is either:

- The rightful owner

OR

- Holds management rights over the property.

The management rights must remain valid for at least five years after project completion, as per Article 65 of the CPR Regulation.

4.1.2 Ownership Documentation for Permanent Installations:

If the project involves supplies requiring permanent installation (e.g., outdoor equipment, kiosks, permanent video walls):

- A decision for the use of the property must be provided, specifying the installation location, issued by the relevant institution.
- An ownership act for the municipal or state-owned property must also be submitted.

4.1.3 Consent of Private Property Owners (if applicable)

If investment activities pass through private property, the applicant must provide:

- Consent of the owners, issued in the original language and translated into English.
- An Ownership Act (original and translated).

The consent must align with the **5-year durability period** (as per Article 65 of the CPR Regulation).

👉 IMPORTANT

When technical infrastructure construction or rehabilitation requires passing through private land, this must be evident from the approved works documentation (working design and building permit).

4.2 Permits

4.2.1 Environmental and Special Status Areas

If investment activities occur in areas with special status (e.g., national parks, protected areas, cultural heritage sites, Natura 2000), applicants must provide relevant documentation (permits, approvals, certificates, statements, etc.) required by national law.

4.2.2 Environmental Impact Assessment

Applicants must submit a copy of a letter issued by the relevant competent body clearly stating that an Environmental Impact Assessment (EIA) for the project investment is not necessary. Alternatively, if the competent authority confirms the need for an EIA, a copy of a positive EIA is required.

4.2.3 Water Management and Environmental Compliance (for Bulgarian partners)

Step 1: Environmental Impact Assessment (EIA):

- If EIA is not required, submit a letter from the competent authority confirming this.
- If EIA is required, submit a copy of the approved EIA.

Step 2 only in cases when EIA opinion (outcome of step 1) requires obtaining consent from the competent Basin Directorate:

- Copy of a letter from the relevant Basin Directorate confirming project compliance with the River Basin Management Plans and Flood Risk Management Plans.

If requested by authorities, Bulgarian partners must provide an explanatory note detailing measures to prevent water pollution in emergency situations.

4.2.4 Any additional permits necessary for commencing the actual works or installing permanent equipment, as mandated by the respective national law.

4.2.5 Building permit

Bulgarian partners:

- A validated building permit ("entered into force") issued no later than three years before project submission is required for activities needing permits.
- If a building permit is not required, submit a document from the competent authority confirming that the works are exempt under Article 151 (1) of the Bulgarian Spatial Development Act.

Serbian partners:

- Building permit or Decision on Approval for the Execution of Works must be valid and in force on the project submission day.
- If no permit is required, provide a document from the competent authority confirming the exemption under Articles 144-146 and 201 of the Serbian Law on Planning and Construction.

4.3 Approved Detailed Works Design (Работен проект, Projekat za građevinsku dozvolu - PGD)

General Requirements:

- **Documentation should include:**
 - Explanatory Notes for each works design part
 - Detailed Bill of Quantities (BoQ)
 - Technical or working design stage drawings
 - Any additional documents that may aid assessment
- **English translation is required** at least for:
 - Explanatory Notes
 - Bill of Quantities
 - Cover sheets of technical drawings
 - Any other relevant documents

Specific National Requirements:

Bulgarian Partners:

- The **Works Design** must comply with Chapter 8, Section 1 of the Bulgarian Spatial Law and Ordinance 4/21.05.2001.
- Approval from the relevant authority is required, with an official seal placed on the investment project designs (as per Article 145 (1) of the Bulgarian Spatial Law).

Serbian Partners:

- The **Project for Building Permit (PGD)** must be developed in line with Article 118a of the Law on Planning and Construction and its corresponding Rulebook.
- If works are based on a Decision on Approval for Execution of Works (Article 145), a Preliminary Design (IDP) is required instead.

If No Formal Works Design is Required:

If national law does not mandate an approved works design, applicants must still provide:

- ❖ Explanatory Note describing the construction/repair works
- ❖ Scheme/plan/drawings of the planned intervention
- ❖ Bill of Quantities (see details below)

Bill of Quantities (BoQ) Requirements:

- Presented in an Excel table format with:
 - Type of construction works (e.g., water/sewage, electrical, architectural)
 - Unit of measurement
 - Estimated quantity
 - Unit price
 - Total amount for each type of work
 - Grand total
- Breakdown per investment site or per works design section where possible
- Must include total amount with and without VAT
- If in national currency, a conversion to EUR must be included using the European Commission's monthly exchange rate at project submission (for Serbian partners only) http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm
- Stamped and signed by the certified designers of the relevant parts
- Submitted in:
 - Scanned original (PDF) in national language
 - English translation, signed as a true copy

- Editable Excel file

Supporting documents may be requested at any time during screening (e.g., cost justifications).

4.3.1 Additional Documentation for Project Investments

- Explanatory notes for each part of the working design.
- Technical drawings (working design stage).
- Detailed Bill of Quantities (BoQ), presented in a breakdown format:
 - Per investment site

OR

- Per section of the working design

Additionally, (BoQ) must include:

- Unit price calculations in EUR
- A total amount with and without VAT

This ensures transparency in cost estimation and compliance with Programme financial requirements.

4.4 Supply of equipment

This section outlines the requirements for the supply of equipment within the project. Key points include:

- **Technical Specification & Estimated Value**
 - Each project partner supplying equipment must submit a technical specification detailing the supplies.
 - The estimated value must be provided in EUR. Serbian partners must convert from local currency using the European Commission's monthly exchange rate at time of submission, (please see above).
 - The specification should be clear and precise to ensure the identification of the required deliverables.
- **Plans/Schemes for Equipment Positioning**
 - Detailed plans/schemes must be submitted for placing the equipment, whether outdoors in public spaces or indoors.
 - If required by national law, these plans/schemes must be approved by the relevant competent authority.

➤ **Installation Permit**

- A valid permit for installation must be provided, with validity at the time of project submission.
- If no permit is required, a statement from the competent authority confirming this must be submitted.

➤ **Market Analysis**

- A market analysis for the planned supply is mandatory.
- The Lead Partner or Project Partner must obtain at least three comparable offers from independent providers, including website references (where available).
- The offers must be based on a uniform request for offer to ensure comparability.
- For Bulgarian partners, as an alternative to three offers, a minimum of three extracts from national/EU public procurement systems for similar supplies with identical technical specifications may be provided.
- The project budget should reflect the average of the received price offers or extracts.
- To account for inflation, the budgeted costs can be increased by the average national inflation rate over the last 3 years, but not exceeding 10%.

➤ **Procurement of Highly Specialized Equipment**

- If the equipment is highly specialized and market research is not feasible, applicants must submit historical data from previously concluded contracts for similar supplies.
- This data will serve as proof that the budgeted costs are reasonable.

SELECTION PROCESS

Overall, the selection process is structured into four three stages, ensuring a focused, effective, and role-driven approach and ends with contracting:

- **Stage 1 – Strategic assessment¹⁴** – performed by the Strategy Board
- **Stage 2 - Screening¹⁵ for administrative, eligibility, and operational compliance** (including content and budget optimization) – conducted by Programme bodies establishing Screening Working Group (SWG).
- **Stage 3 - Grant awarding** – finalized by the Monitoring Committee.

¹⁴ A *scoring process*, where project proposals receive scores within a defined range based on their alignment with the required criteria.

¹⁵ A *Yes/No verification process* ensuring the project proposal meets all Programme requirements for contracting

- **Stage 4 - Contracting** (including checks for double funding, de minimis and on-the-spot visits) – executing by the SWG and the Managing Authority.

Actors involved, roles and responsibilities in the selection process:

Monitoring Committee (MC) - It is responsible for approving the present Assessment rules and making final decisions on projects selection, including the amount of funding granted (as per Regulation (EU) No 2021/1059).

The Managing Authority (MA) oversees the selection process by appointing key personnel, participating in screening, reviewing assessment reports, submitting them for approval to the MC, and ensuring the integrity of the process through supervision and corrective actions.

The National Authority (NA) supports the selection process by appointing key personnel from the partnering country, participating as voting members in screening, and assisting the MA in ensuring fairness, impartiality, and effective problem-solving.

The Operational Unit (OU) supports the selection process by participating in screening, assisting the Strategy Board in strategic assessment, and providing continuous support to the MA and NA throughout the selection cycle.

The Strategy Board (SB) is responsible for Stage 1 'Strategic Assessment', ensuring that project proposals align with the objectives of the Territorial Strategy and the Programme by evaluating their strategic relevance, territorial footprint, cross-border impact, and contribution to integrated territorial development.

The Screening working group (SWG) - Consists of assessors nominated by the MA and NA. It is established by an administrative order signed by the Head of the MA and is responsible for Stage 2 'Administrative, Eligibility, and Operational Compliance'.

External assessors - In cases where the number of submitted proposals is exceptionally high, external assessors may be engaged to support Stage 2 of the selection process. These assessors are nominated by the MA and the NA. They operate under the supervision of the SWG Chairperson, ensuring adherence to the principles of confidentiality, fairness, and impartiality. External assessors perform the same tasks as internal assessors.

General principles of the selection process

Confidentiality

The selection process is confidential, with all involved parties bound by non-disclosure obligations. Information on proposals and assessments is restricted to authorized bodies, assessors' identities remain confidential, and all documents must be securely stored and accessed only when necessary.

Objectivity, Impartiality, and Equal Treatment

All proposals are assessed solely based on merit, following predefined criteria. Evaluators must avoid conflicts of interest, report any potential bias, and sign declarations of impartiality. Assessors cannot evaluate proposals linked to their institutions or participate in subcontracted services for assessed projects.

Transparency and Accountability

The two-tier selection process ensures fairness by first filtering non-compliant proposals (Stage 1) and then ranking eligible ones based on strategic impact (Stage 2). Assessment criteria remain fixed throughout, and clear, detailed feedback is required. The MA monitors compliance.

Additional Commitments

All participants must ensure high-quality evaluations, adhere to set deadlines, and maintain proper documentation for traceability and audit purposes while safeguarding confidentiality.

Stages of the selection process

Stage 1: Strategic Assessment (Scoring & Ranking performed by SB). The Assessment grid is provided as Attachment 9.

- *All submitted proposals are scored*
- **Scoring Process Options :**
 - **Option 1:** Consensus decision (preferred)
 - **Option 2:** Average score voting (one delegation – one score, final score calculated as the average of both delegations' scores)
- *Projects ranked from highest to lowest*
- *The Head of OU summarizes stage outcomes in a draft report and send it to the Head of the MA and the NA*

Stage 2: Screening (Administrative, Eligibility, and Operational Compliance carried out by SWG). The Screening grid is provided as Attachment 7.

- *All submitted project proposals that have not received an overall score of 0 at Stage 1*
- *Each proposal reviewed independently by two assessors (MA & NA nominations)*
- If both assessors give a **Yes** → Proceed to Stage 3
- If both assessors give a **No** → Proposal is disqualified
- If one says **Yes** and the other **No** → Arbitration required

- Content and budget optimizations¹⁶
- Calculation of Service Impact Index (by a methodology, provided as Attachment 8)
- *SWG Chair prepares the Final Evaluation Report (Stage 1 + Stage 2)*
- *MA submits the report & the ranking to MC*

Stage 3: Grant Award (MC Approval & Notifications)

- MC reviews the report & ranking list
- If no votes against, MC approves the list
- MA notifies Lead Partners of their project’s outcome
- Disqualified/low-ranked projects can file a complaint. The Complaint procedure is provided as Attachment 5

Stage 4: Contracting (MA)

Begins after MC approval and continues until the Call’s budget is exhausted, based on projects that have fulfilled the following contracting criteria:

- Double funding check
- De minimis check
- On-the-spot visits (*only for SGI projects with investment component*)

INDICATIVE TIMETABLE

Step	Description	Indicative date of period
1	Launch of the Call	The begging of June 2025
2	Application process	3,5 months
3	Selection process	4 months
4	Grant award decisions	December 2025 – January 2026

¹⁶ **Budget and Content Optimization** refers to the structured review and fine-tuning of key project elements to enhance realism, consistency, and compliance with programme requirements for contracting. This step typically involves:

- **Deliverables Optimization** – Ensuring that project activities are aligned with clear and measurable deliverables. If necessary, deliverables may be adjusted or introduced to better reflect project activities and objectives, facilitating accurate project implementation and monitoring.
- **Indicator Refinement** – Revising target values for output and result indicators to ensure they are realistic, achievable, and aligned with programme expectations.
- **Budget Adjustments** – Strengthening the cost-activity-objective linkages to ensure cost-effectiveness, realism, and the eligibility of expenses.