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BULGARIA - TURKEY IPA CROSS-BORDER PROGRAMME

GUIDELINES FOR APPLICANTS

Call for proposals

No. 2007CB16IPO008 – 2011 – 2

Deadline for submission: December 8, 2011

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Legal Basis

In the elaboration of these Guidelines for Applicants the following legal provisions have been observed:

Basic EU rules

- Council Regulation (EC) **No 1085/2006** of 17 July 2006 establishing an Instrument for Pre-accession Assistance – the IPA general regulation;
- Commission Regulation (EC) **No 718/2007** of 12 June 2007 implementing Council Regulation (EC) No 1085/2006 establishing an instrument for pre-accession assistance – the IPA implementing regulation (IPA IR).
- Commission Regulation (EC) **No 80/2010** of 28 January 2010 amending Regulation (EC) No 718/2007 implementing Council Regulation (EC) No 1085/2006 establishing an instrument for pre-accession assistance (IPA)

Basic programme rules

- • Bulgaria-Turkey IPA Cross-border Programme 2007-2013 approved by Commission on 20.12.2007 with programme reference number CCI 2007CB16IPO008, amended with C(2010) 3777/22.6.2010;
- Financing Agreement between the Commission of the European Communities and the Government of Republic of Turkey.

National legislation

Besides EU rules and rules of the Operational Programme, national rules have to be respected. Some examples:

- valid national legislation ruling specific fields e.g. environmental interventions, natural and cultural heritage, construction, and others.

Please note that all these legal provisions must also be observed by the applicants during both project preparation and implementation phases.

1 General Information

These Guidelines for Applicants aim to provide practical information to the potential beneficiaries under Bulgaria – Turkey IPA Cross Border Programme.

It is the most practical level of documentation needed for the successful submission of a project proposal under this programme. These Guidelines for Applicants provide information on how to fill in the application form, budget and related forms, the application procedure, the project selection criteria, the decision procedure and other practical advices.

IMPORTANT

Please note that this is not an EU Phare programme or Joint Small Project Fund. Therefore please read carefully these Guidelines for Applicants in order to avoid confusion!

1.1 Overview of Bulgaria – Turkey IPA Cross Border Programme

This programme is co-financed by the European Union through the IPA instrument and co-financed by Bulgaria and Turkey through contributions from state budgets and if applicable - from project potential beneficiaries.

The programme document drafted jointly by the two countries through a large partnership with national, regional and local stakeholders was approved by the European Commission on 20 December 2007 (Decision no. C(2007) 6477). It sets out the general framework of intervention of IPA in the Programme cross-border area. **The programme document is available on <http://www.ipacbc-bgtr.eu/> and <http://www.abgs.gov.tr>**

The programme continues the evolution of the EU's cross-border initiatives, reflected in the External Border Initiative Programme and Phare Cross Border Co-operation Programme between Bulgaria and Turkey.

Information on types of eligible projects, activities and beneficiaries, the budget breakdown per priority axes and key areas of intervention are given below.

1.1.1 Eligible Cross-border Area

The eligible co-operation area is determined in accordance with the IPA rules set out in Regulation 1085/2006 where only NUTS III regions (or respective equivalents) are eligible for cross-border co-operation programmes. In Bulgaria the corresponding NUTS III administrative-territorial units are the districts established by the Law on the Administrative Territorial System in Republic of Bulgaria. In Turkey the corresponding equivalent of NUTS III administrative-territorial units are the provinces established by Decision of Council of Ministers No 2002/4720.

The eligible cross-border co-operation area includes districts **Bourgaz, Yambol** and **Haskovo** on the Bulgarian side and provinces of **Edirne** and **Kirklareli** on the Turkish side. Bulgaria – Turkey co-operation area covers a territory of 29032.9 km² with total population of 1 561 984 people. Common Bulgarian – Turkish border stretches along 288 km with 3 currently operating border crossing points.



Geographical structure of the co-operation area

1.1.2 Programme Strategy

IPA replaces five previously existing pre-accession instruments, namely PHARE, ISPA, SAPARD, Pre-Accession Financial Assistance Programme for Turkey and CARDS, and thus uniting under a single legal basis all the pre accession assistance. IPA has also been designed to better adapt beneficiaries to the different objectives and thus providing a targeted and effective support according to their needs and evolution.

Border regions are often facing disadvantages due to their peripheral geographical locations and relative isolation from national economies. At the same time the development of the internal market within the Union (and the free movement of people, goods, services and capital) also brought out the need for the balanced development and integration of the European territory.

The CBC Programme is targeted at maximizing the specific value that can be added within the described framework.

The Programme strategy is developed by giving a stress on fostering the strengths and use of the potential opportunities of the region through the defined priorities and spheres of intervention taking into account cross-border needs and possibilities for cooperation.

1.1.3 Programme Objectives

The strategy, therefore, sets out to address the specific needs of the border area both in the short and long term, and supports the following **overall objective**:

Achieving balanced sustainable development build upon the key strengths of the Bulgaria-Turkey cross-border co-operation area in contribution to stronger European co-operation and integrity.

The overall objective of the programme, with the core elements of the strategy derived from the SWOT analysis, together led to the formulation of the following **specific objectives of the IPA CBC Programme**, which should be taken into account when preparing a project:

- ***Specific objective No. 1: To boost sustainable economic development in co-operation area built on the comparative advantages.***
- ***Specific objective No. 2: To improve the overall social development and promote social cohesion among people and communities.***
- ***Specific objective No. 3: To improve the quality of life by efficient use of common natural resources as well as protection of natural, cultural and historical heritage values***

Each of the development areas (economic, social, cultural, environmental) represent an integral part of the term: "sustainable development" which corresponds to the overall objective of the CBC Programme. The issues of sustainable development on other hand shall be addressed with an integrated approach, as the limited funds will not allow for special attention and separate funds to be spent for each issue.

📌 IMPORTANT

For further details on programme strategy please refer to the programme document.

1.1.4 Programme Priority Axes

In order to achieve the objectives set out in the programme document, the partnering countries have jointly agreed upon the main directions on which the interventions under this programme should focus. These main directions are called "Priority Axes" and are as follows:

- ***Priority Axis 1: Sustainable Social & Economic Development;***
- ***Priority Axis 2: Improvement the Quality of Life;***
- ***Priority Axis 3: Technical Assistance.***

📌 IMPORTANT

Only the first two Priority Axes finance projects submitted by applicants while the third one is dedicated to ensure the proper functioning of the programme management and implementation bodies.

The priority axes are broken down to key areas of intervention as follows:

Priority Axis 1: *Sustainable Social & Economic Development*:

Measure 1.1: Improvement of the social development and social cohesion links;

Measure 1.2: Economy Competitiveness increasing;

Measure 1.3: Infrastructural support for the improvement of the economic potential of the co-operation area;

Priority axis 2: Improvement the Quality of Life

Measure 2.1: Protection of environment, nature and historical and cultural heritage;

Measure 2.2: Capacity building for sustainable use of natural resources, cultural and historical heritage.

1.2 Programme Implementation Structures

According to the relevant IPA Regulations, the two partnering countries have established the following main management and implementation bodies:

Managing Authority - Ministry of Regional Development and Public Works of the Republic of Bulgaria. Directorate General Territorial Cooperation Management, part of the specialized administration at the Ministry is appointed as Managing Authority for Bulgaria-Turkey IPA Cross Border Programme (CCI Number 2007CB16IPO008) The Managing Authority is responsible for managing and implementing the cross-border programme in accordance with the principle of sound financial management.

National Authority – Republic of Turkey Ministry for EU Affairs cooperates in joint programming, management and implementation of the programme.

Joint Monitoring Committee (JMC) is formed of representatives at national, regional and local level from both countries, supervises the programme and is responsible for its strategic adaptation.

Joint Technical Secretariat (JTS-main office) is based in Haskovo (Bulgaria). It assists the programme management bodies in carrying out their respective duties and is the main contact point between the programme and the potential beneficiaries/project partners.

Joint Technical Secretariat (JTS-branch office/antennae) is based in Edirne (Turkey) as part of the JTS, having as main role to serve as local contact point for potential beneficiaries/project partners.

📌 IMPORTANT

The JTS – main office and branch office/antennae – are the main structures responsible for providing information and support to potential beneficiaries.

1.3 Programme Financial Allocation for the Second Call for Proposals

The total budget of the programme under Priority axis 1 and Priority axis 2 for the 2010-2011 programming period is **8.941.025 Euro**, of which **7.599.872 Euro** is represented by EU contribution. The remaining **1.341.153 Euro** are national contributions from national budgets of partnering countries.

Please note that the programme financial allocation is neither broken down by each partner country nor by eligible region.

The total amount allocated for this call for proposals for the two priority axes is broken down as follows:
(in Euro)

Priority Axis	Community Funding	National Public Funding*	Total Funding
	(a)	(b)	(a)+(b)
Priority Axis 1	3.377.721	596.068	3.973.789
Priority Axis 2	4.222.151	745.085	4.967.236
TOTAL	7.599.872	1.341.153	8.941.025

****Contributions from national budgets of partnering countries***

The Managing Authority saves the right to reallocate all financial resources in case of fewer projects applied or projects with insufficient quality.

1.4 Programme indicators

The programme indicators are vital to the efficient and effective implementation of the Programme. They serve to monitor and evaluate the extent to which the Programme has achieved its objectives, and the efficiency with which it has done so. The aim of the indicators is to measure whether the CBC programme has achieved its strategic objectives or not and to measure the effectiveness of the chosen intervention.

Two levels of indicators could be distinguished:

Horizontal level - Indicators on the horizontal level comprise measurements referring to transversal principles that need to be upheld at all impact levels of the programme (short-term, medium-term and long-term).

Vertical level - The achievement of specific objectives of the programme will be measured by specific impact, output and result including the cooperation indicators.

- Impact indicators refer to the consequences of the programme beyond the immediate effects.
- Result indicators relate to the direct and immediate effect on direct beneficiaries brought about by a programme on its direct beneficiaries.
- Output indicators relate to activity. They can be quantified for measures and projects.

1.5 State Aid

"State aid" is any aid, granted by the State or through state or municipal resources, or on behalf of state or municipal resources, directly or through other persons, in any form whatsoever, which distorts or threatens to distort competition by favouring certain undertakings or the production or the trade of certain goods, or the delivery of certain services, in so far as it affects trade between Member States.

Any entity engaged in an economic activity, that is, an activity consisting in offering goods or services on a given market, regardless of its legal status and the way in which it is financed, is considered an undertaking. To qualify, no intention to earn profits is required, nor are public bodies by definition excluded. Commercial and profit-making **activities** are **not** eligible under this Call for Proposal.

1.6 Revenue Generating Projects

No revenue generating projects shall be financed under the present call for proposals.

2 Rules of the Call for Proposals

2.1 Cooperation criteria

The projects must have direct cross-border impact, which shall be understood in terms of respecting at least one of the following conditions as described below: joint development, joint staffing, joint implementation and joint financing.

Joint development – means that the project must be designed in close cooperation of the partners from both sides of the border. This means that project proposals must clearly integrate the ideas, priorities and actions of stakeholders on both sides of the border. The Lead Partner is the coordinator of this process but should include other partners from the beginning of the development process;

Joint implementation – means that activities must be carried out and coordinated among partners on both sides of the border. It is not enough that activities run in parallel. There must be clear content-based links between what is happening on either side of the border and regular contact between the two sides. The Lead Partner is responsible for ensuring that activities are properly coordinated, that schedules are kept and that the right quality levels are achieved;

Joint staffing – means that the project should not duplicate functions on either side of the border. Therefore, regardless of where the person is located, there should be a joint project management. The staff will be responsible for project activities on both sides of the border;

Joint financing – The budget should be divided between partners according to the activities carried out. There is only one project bank account for the EU and national contribution (held by the Lead Partner). The Lead Partner is responsible for administration and distribution of these funds and for reporting on their use.

2.2 Horizontal themes

The following horizontal themes shall be observed by all applicants in the development and implementation of their projects:

- a) **Equal opportunities** – a fundamental right, a shared value and a key objective of the European Union – represent a priority fully taken on board by the programme and consequently all the financed projects are expected to observe it when developing the project objectives, target groups, activities and results.

Equal opportunities refer to preventing any discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation or on any other similar criterion.

- b) **Sustainable development** – meeting the present needs while thinking of those of the future generations – should be regarded from the ecologic, economic and social point of view. In designing and implementing the project, the applicants should aim at a balanced use of resources, appropriate choice of logistics and raising public awareness on sustainable development issues (e.g. by inserting messages on printed materials or in the e-mails).
- c) **Climate change** – a great concern at global and EU level – should be another key element of which the applicants should be aware of. The main factors contributing to climate change are greenhouse gases deployed in the atmosphere from energy and non-energy sources. Projects should at least avoid making use of such sources and additionally support the fight against climate change.

The observance of the horizontal themes shall be taken into account during project evaluation and additional points shall be awarded to projects which propose explicit measures with positive impact on one or more of them, even in terms of raising public awareness. Please see the attached evaluation grid.

For more information regarding the Programme commitment towards observing the horizontal themes, please consult the official version of the Programme, available at http://ipacbc-bgtr.eu/eng/page/documents/programme_documents

2.3 Applicable law and public procurement

The projects must be in line with the national and European legislation on equal opportunities and environmental protection. The project must also respect the European legislation provisions on information and publicity.

The beneficiaries have the possibility to award contracts to contractors. Contractors are neither partners nor associates, and are subject to the procurement rules set out in the **PRAG (Practical Guide to Contract Procedures for EC External Actions)** rules.

IMPORTANT

When the beneficiaries of a project contractor the activities in order to achieve the goals of the operation, the contracting must be done by a transparent tendering procedure, following the provision of EU Regulation 718/2007, article 121, translated into Practical Guide to Contract Procedures for EC external actions.

2.4 Communication and Visibility

The information and publicity measures for the interventions of the IPA Funds are aimed at publicising the actions of the European Union, increasing transparency and creating a uniform image of the interventions throughout participating countries. In all actions (projects, programmes) communication activities should be properly planned. Communication should focus on the achievements and impact of the project actions. In order to maximise the impact of communication efforts:

- Activities need to be timely
- Activities should be appropriate in terms of resources spent and expected impact.
- Information used must be accurate
- The right audience(s) should be targeted, etc.

The following communication and visibility activities might be foreseen by the applicants in their Application forms:

- Press releases
- Press conferences
- Leaflets, brochures and newsletters
- Web sites
- Display panels
- Commemorative plaques
- Banners
- Promotional items
- Audiovisual productions
- Public events
- Information campaigns

More detailed practical guidelines (including templates) concerning the basic information and publicity measures are provided by the European Commission in the Communication and Visibility Manual for EU External Actions, published on the following EU website:

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

2.5 Eligibility Criteria

The financing under the current Programme shall be made available to potential beneficiaries through a competitive process. The Managing Authority together with the National Authority and the Joint Technical Secretariat are launching the present call for proposals.

The present call for proposal has the goal of establishing solid partnerships in the eligible area by financing “soft projects” (as studies, strategies, seminars, know-how exchanges etc.) and “investment projects” (as works activities, supply etc.).

The submission of projects is open to all potential beneficiaries that meet the eligibility criteria set below.

In order to be eligible for funding under the programme, a project should meet three sets of eligibility criteria:

- eligibility of applicants (see section 2.5.1),
- eligibility of activities (see section 2.5.2),
- eligibility of expenditures (see section 2.5.3).

2.5.1 Eligibility of Applicants (Lead Partner and Partners)

IMPORTANT

Under this call for proposal the Applicant is considered a group of Lead Partner and its Project partners.

Lead Partner Principle: For each project, a “Lead Partner” (LP) among the project partners must be appointed prior to the submission of the project proposal. The Lead Partner shall be a legal person *in the eligible border region of the Programme*. The Lead Partner, as the applicant of the project proposal, will be responsible for the development and submission of the project proposal, and will sign the grant contract (Annex C) with Managing Authority.

The lead partner assumes the following responsibilities:

- lays down the arrangements for its relations with the partners participating in the operation in an agreement comprising, inter alia, provisions guaranteeing the sound

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- financial management of the funds allocated to the operation, including the arrangements for recovering amounts unduly paid;
- signs the subsidy contract for implementation of the operation with MA and further addenda to the contract (if any);
- is responsible for ensuring the implementation of the entire operation;
- is responsible for transferring the relevant budget amount to the partners participating in the operation according to the partnership agreement and certified costs;
- ensures that the expenditure presented by the partners participating in the operation has been paid for the purpose of implementing the operation and corresponds to the activities agreed between the partners participating in the operation;
- verifies that the expenditure presented by the partners participating in the operation has been validated by the controllers referred to in Article 108 of Commission Regulation (EC) No.718/2007 of 12 June 2007;
- collects the information from the project partners, cross-checks the verified activities with the progress of the project and submits the reports to the JTS;
- signs the agreement for implementation of the operation with MA;
- informs MA about project modifications.

More information about the role and tasks of the Lead Partner are provided in the grant contract and in the partnership agreement template (Annex A3);

📌 IMPORTANT

Every project must include at least one partner from each side of the border region. Projects which do not comply with this requirement will not be eligible.

All partners are directly responsible for the project implementation and cannot act as an intermediary.

All organizations participating, as applicants, under this Call for Proposals, are called partners. The partners shall select one, among themselves, to be the Lead Partner.

General Criteria for Eligibility of Applicants (Lead Partner and Partners)

1) Lead Partner and its partners must complete all of the following general eligibility criteria:

- be legally established organizations (legal persons) or public institutions (provincial directorates and/or local branches of central administrations, etc.)

and

- be established within the eligible cross border region between Bulgaria and Turkey

and

- be non profit making

and

- belong to one of the following categories:
 - be local/regional/national authorities or subsidiary structure(s) of local/regional/national authorities situated in the eligible area. In case a local/regional/national structure **is not and can not act as a legal entity**, its legally established central organization, if such exists, shall be the project partners
 - be national and regional agencies (responsible at central, regional and municipal level)
 - be nature park administrations
 - be local/regional forestry directorates
 - be health care institutions
 - be cultural institutions
 - be community centres
 - be regional employment agencies

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- be non-governmental or non-profit organisations such as business support organizations, local enterprise agencies, development agencies, chambers of commerce, Information and Communication Technology (ICT) development agencies, educational, training and Research and Development (R&D) institutions, employers and producer associations, labour unions; state and public agencies and organizations
- be educational institutions such as universities, schools, colleges and libraries
- be Euro regions

and

- be directly responsible for the preparation and management of the action, not acting as an intermediary.

and

- not be affected by potential conflict of interest with the Joint Structures of the Programme (Managing Authority, National Authority, Certifying Authority, Audit Authority, Joint Monitoring Committee, Joint Steering Committee and Joint technical Secretariat). Should such situation arise during performance of the contract the beneficiary must immediately inform the Managing Authority

The above criteria are cumulative and all must be fulfilled together.

📌 IMPORTANT

Lead Partner must be registered within eligible border region between Bulgaria and Turkey at least 12 months before the deadline for submission of project proposals under current call for proposals.

IMPORTANT

The Lead Partner and the other partners in a project have to complete a declaration for the absence of conflict of interest. The content of the Declaration must be complied with the provisions of the national legislation of the respective partner. The Declaration should indicate that for every declared information the person, completing this declaration for the availability or the absence of conflict of interest, shall be borne responsible for and could be started proceedings against.

DEFINITION OF CONFLICT OF INTEREST-article 52 of Regulation 1605

1. All financial actors and any other person involved in budget implementation, management, audit or control shall be prohibited from taking any action which may bring their own interests into conflict with those of the Communities. Should such a case arise, the person in question must refrain from such actions and refer the matter to the competent authority.

2. There is a conflict of interests where the impartial and objective exercise of the functions of a financial actor or other person, as referred to in paragraph 1, is compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other shared interest with the beneficiary.

The availability of conflict of interest is present when all requirements to article 52 of Regulation 1605 are realized cumulative

2) Potential applicants are not eligible to participate in calls for proposals if:

- (a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are

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- the subject of proceedings concerning those matters, or are in any analogous situation, arising from a similar procedure provided for in the national legislation or EU regulations;
- (b) they have been convicted of an offence concerning professional conduct by a judgment which has the force of *res judicata* (i.e., against which no appeal is possible);
 - (c) they are guilty of serious professional misconduct proven by any means;
 - (d) they have not fulfilled obligations relating to the payment of debts to the consolidated state budget;
 - (e) they have been the subject of a judgment which has the force of *res judicata* for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities or national financial interests;
 - (f) they have been declared to be in serious breach of contract for failure to comply with their contractual obligations in connection with a procurement procedure or other grant award procedure financed by the Community or national budget.

Applicants are also excluded from participation in calls for proposals or the award of financial support if, at the time of the call for proposals, they:

- (g) are subject to a conflict of interests; the conflict of interests represents any circumstances that may affect the evaluation or implementation process, in an objective and impartial manner. Such circumstances may result from economic interests, political or national preferences or family connections.
- (h) are guilty of misrepresentation in supplying the information required by the Managing Authority/ Joint Technical Secretariat as a condition of participation in the call for proposals or fail to supply this information;
- (i) have attempted to obtain confidential information or influence the evaluation bodies during the evaluation process of current or previous calls for proposals;

In the cases referred to in points (a), (c), (d), (f), (h) and (i) above, the exclusion applies for a period of two years from the time when the infringement is established. In the cases referred to in points (b) and (e), the exclusion applies for a period of four years from the date of notification of the judgment.

📌 IMPORTANT

The LP on behalf of all partners should sign a “Declaration of eligibility” (Annex A4), declaring that all project partners including Lead Partner, do not fall into any of the above categories (a) to (i).

📌 IMPORTANT

The maximum number of partners in a project shall not exceed five (5) including the Lead Partner.

All partners must sign a partnership agreement that stipulates their rights and duties. The partnership agreement should be annexed to the application form. A partnership agreement template is annexed to the present Guidelines (Annex A3). The partners may decide to add additional provisions to the partnership agreement in a separate annex to partnership agreement.

All partners must have clear roles in project development and implementation.

Under no meanings political parties and ideologically based organizations are not eligible under this call for proposal.

🔔 IMPORTANT

Number of project proposals and grants per institution/organization:

Under the current call for proposals an institution/organization may submit maximum one project proposals as a Lead Partner. In case an institution/organization has submitted more than one project proposal as a Lead Partner, all these submitted (as Lead partner) proposals will be eliminated at the administrative evaluation stage.

Under the current call for proposals an institution/organization may participate in no more that 5 (five) project proposals as a partner (i.e. if an organization/institution has submitted a proposal as a Lead Partner, it can be a partner in no more than 4 other projects, and if it has not submitted a project as a Lead Partner it can participate as a partner in no more than 5 projects). In case an institution/organization participates in more than 5 (five) project proposal, all submitted proposals will be eliminated at the administrative evaluation stage.

2.5.2 Eligibility of Actions

The project proposals must be in line with the indicative operations from the key area of intervention under each priority axis as stipulated in the Bulgaria – Turkey IPA Cross-Border Programme.

🔔 IMPORTANT

Under this call for proposals, two types of projects shall be financed

- “soft”(non-investment) projects aiming at developing studies, workshops, seminars and exchanges of experience, etc. and
- “investment” projects such as works activities, supply etc. Such projects may also include “soft” measures.

In addition feasibility studies or other types of preparation of technical documentation shall be financed under this call for proposals.

Project Duration and Grant Amounts

Priority axis	Area of intervention	Type of measure	Grant Amounts (€)	Project Duration (minimum - maximum months)
Priority Axis 1 <i>Sustainable Social & Economic Development</i>	1.1 Improvement of the social development and social cohesion links	Soft	50.000-150.000	6-12
	1.2 Economy Competitiveness increasing	Soft	50.000-150.000	6-12
	1.3 Infrastructural support for the improvement of the economic potential of the co-operation area	soft	50.000-150.000	6-12
		Investment	250.000-750.000	6-24
Priority Axis 2 Improvement the Quality of Life	2.1 Protection of environment, nature and historical and cultural heritage	Soft	50.000-150.000	6-12
		Investment	250.000-750.000	6-24
	2.2 Capacity building for sustainable use of natural resources, cultural and historical heritage	Soft	50.000-150.000	6-12

In addition, no grant may exceed 85% of the total eligible costs of the project (see also section 2.2.3). The remaining amount (15%) is financed from the national budgets of the partnering countries as national co-financing. Contributions from the applicant's or partners' own resources are not obligatory. However the applicants may provide its own co-financing which should be reflected in the project budget and it will be a subject of checking for spending.

📌 IMPORTANT

Non-investment ("soft") projects, containing mainly soft activities **can envisage investment measures (small scale construction, repair works, renovation and supply of equipment)** if necessary. Investment expenditures **in this case must not exceed 25 % of total eligible project costs**, and their need for the purpose of specific activity/activities has to be sufficiently justified.

"Investment" projects including "soft" measures are also eligible for financing. In this case expenditures for investment activities should form **at least 60 % of total eligible project costs**.

Priority axis	Area of intervention	Type of measure	Available funding for current call (€)	% of soft/investment funding from the respective Priority Axis
Priority Axis 1 <i>Sustainable Social & Economic Development</i>	1.1 Improvement of the social development and social cohesion links	Soft	1 192 137	30%
	1.2 Economy Competitiveness increasing	Soft		
	1.3 Infrastructural support for the improvement of the economic potential of the co-operation area	Soft		
		Investment	2 781 652	70%
Priority Axis 2 Improvement the Quality of Life	2.1 Protection of environment, nature and historical and cultural heritage	Investment	3 477 065	70%
		Soft	1 490 171	30%
	2.2 Capacity building for sustainable use of natural resources, cultural and historical heritage	Soft		

📌 IMPORTANT

Allocation of the budget between “Soft” and “Investment” projects within each Area of Intervention will be respectively 30:70 % from the total amount of the respective Area of Intervention.

Location: **Actions must take place in one or both following countries: Republic of Bulgaria and Turkey within the eligible regions listed below**

For Republic of Bulgaria the following regions and municipalities are eligible:

- ✓ District of **Burgas**: 13 municipalities – Aitos, Burgas, Sredets, Kameno, Karnobat, Malko Tarnovo, Tsarevo, Nesebar, Pomorie, Ruen, Sozopol, Sungurlare, Primorsko ;
- ✓ District of **Yambol**: 5 municipalities – Yambol, Bolyarovo, Elhovo, Straldja, Toundzha;
- ✓ District of **Haskovo**: 11 municipalities – Haskovo, Dimitrovgrad, Ivaylovgrad, Lyubimets, Madjarovo, Mineralni bani, Svilengrad, Simeonovgrad, Stambolovo, Topolovgrad, Harmanli.

For Turkey the following provinces and districts are eligible:

- ✓ **Edirne**: 9 districts - Edirne, Enez, Havsa, İpsala, Keşan, Lalapaşa, Meriç, Süloğlu, Uzunköprü;
- ✓ **Kirklareli**: 8 districts – Babaeski, Demirköy, Kirklareli, Kofçaz, Lüleburgaz, Pehlivan köy,

Pınarhisar, Vize;

Types of Activities:

The types of activities financed under each Priority axis, Key areas of Intervention and Indicative operations must demonstrate a clear cross-border effect to the eligible programme area.

IMPORTANT

One project proposal may be submitted for financing under only one Key Area of Intervention which must be clearly indicated. This is obligatory condition.

Detailed description of the eligible activities under this call for proposals are given below:

Priority Axis 1 – Sustainable Social & Economic Development

This priority axis aims to increase the overall competitiveness of the cross border economy and to improve social development and social cohesion of the border region:

The axis is split in three key areas of intervention, referring to:

- **Improvement of the social development and social cohesion links;**
- **Economy Competitiveness increasing;**
- **Infrastructural support for the improvement of the economic potential of the co-operation area.**

Key Area of Intervention 1 – Improvement of the Social Development and Social Cohesion Links

Eligible activities should use soft measures and are symbolically characterized by two types of characteristics: human resource development by promoting the European concept of Lifelong learning and people to people collaboration activities.

The list of activities includes but is not limited to:

- Development of joint training products, guides, textbooks, manuals etc. materials;
- Implementation of cross border activities targeting human resource development and improvement of skills of vulnerable persons so to match the labour market demands and requirements;
- Establishment of joint Human Resources development systems, development of strategies and sharing of best practice in the field of HR management;
- Pilot actions and networking activities among organizations/institutions by implementation of training/education and capacity building initiatives and schemes aimed to reinforce social and cultural links; development and implementation of cross border initiatives between relevant (training/educational/scientific) institutions (such as seminars, conferences, training events, targeting transfer of know-how, technology transfer, scientific and cultural exchange), creation of cooperation between the education/vocational training institutions and the labour market, creation of a joint information systems giving the possibility of institutional contacts for cross-border activities, research for establishment of common social and public services including health care cooperation, etc.;

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- Implementation of cross border activities in the border region aimed to promote best business and cross-border cooperation practices and strengthening the transfer of expertise;
- Creation of information networks for e-services (e-health, e-learning, e-government etc.)

Key Area of Intervention 2 – Economy Competitiveness Increasing

Eligible actions should use soft measures. The list of actions includes but is not limited to:

- Preparation of joint research studies for market opportunities.
- Implementation of initiatives for development of common labour market and more close collaboration between labour forces.
- Development of training, scientific transfer and best practices exchange aimed to creation of knowledge based economy.
- Cross-border awareness raising activities on acquis compliance for SMEs, about market development and market conditions across the border: seminars, training courses, information campaigns, joint development of guides and other publications, assessments and other types of co-operation in the field.
- Creation of co-operation structures for providing joint cross border services to business and especially SMEs, advising on preparation and certification of private companies, NGOs and public institutions ensuring systems for quality of management, products, ecological requirements;
- Joint actions for business-support of cross-border business activities: establishment of centres to support cross-border business initiatives, development of joint marketing and promotion services, use of ICT¹ for promoting cross-border cooperation between companies (information services, creation of databases for regional stakeholders, joint business directories, Internet platforms, various Internet-based informational resources), joint initiatives for attracting direct investment in the cross-border region and strengthening the transfer of expertise, etc.
- Counseling and advice in business start up, business planning and strategy development, technology transfer, patents and trade marks, legal affairs, finance and marketing;
- Cross-border initiatives for the promotion of entrepreneurial collaborations: training programmes, development of support schemes and establishment of economic networks;
- Promoting cross border networking by organization of cross-border business events such as meetings, seminars, training sessions, workshops, conferences, business excellence awards aimed to partner search, general business advice and training, development of clustering opportunities, etc.
- Support for the setting up of the joint ventures, co-operatives or consortia for joint manufacturing or provision of tourist services - preparation of business and marketing plans, market studies, market and public relations (PR) campaigns, direct export sales and marketing.
- Actions aimed to develop, diversify and promote sustainable tourism in the area based on the uniqueness of common natural heritage, biodiversity abundance and cultural richness, promoting cross border area as unique destination;

¹ ICT – information and communication technologies

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- Joint studies related to the increase of the energy efficiency and of the use of renewable energies;

Key Area of Intervention 3 – Infrastructural Support for the Improvement of the Economic Potential of the Co-operation Area

(1) "Soft" measures

Under this indicative operation, the following actions are eligible:

- Pre-feasibility and feasibility studies;
- Economic and technical studies;
- Cost-benefit analyses, marketing studies, financial and cash-flow plans;
- Environmental Impact Assessments;
- Research and information services for entrepreneur, health, social and education organizations – Creation of Data Bases, Internet platforms, Joint business directories, Technical Studies;
- Background studies and rules for the preparation of aid schemes and financial support tools
- Detailed project designs, architectural and engineering designs, architectural survey projects and preparation of other necessary documentation;
- Preparation of tendering (public procurement) documents and bills of quantities

(2) "Investment" measures

Investment actions aimed to improve small scale infrastructure are eligible under this indicative operation. The list of actions includes but is not limited to:

- Development/reconstruction social infrastructure (educational, health care, child care, etc.) including small-scale infrastructure ensuring equal opportunity access to main facilities;
- Investment/Supply of specialized equipment (i.e. data base, information systems equipment, furniture, etc);
- Renovation and establishment of small scale infrastructure, communication networks, and adjacent facilities (bus stops, parking places, pavements, lighting and green areas, street widening, etc);
- Works supervision services related to the small scale infrastructure investments.

IMPORTANT

All works activities should be implemented on a public municipal or public state-owned property. The property should be:

- free of any encumbrances;
- not the object of an pending litigation;
- not the object of a claim according to the relevant national legislation.

All envisaged works activities have to be supported with approved/certified detailed works design, detailed bill of quantities and issued Construction Permit (where applicable according to the relevant legislation²). In case of construction works, for which the relevant legislation do not require approval of a work design and issuing

² Law of Spatial Planning (Official Gazette of Republic of Bulgaria № 1/2001

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Construction Permit, the applicants have to present a statement by the relevant institutions for exception of the rule for design's approval.

All supplies have to be supported by detailed technical specification, relevant unit prices and total price.

All prices concerning investment activities have to be in Euro.

All the investment proposals should have positive environmental impact assessment (EIA), if for such kind of activities an EIA is required by the national legislation.

When the relevant legislation does not require positive environmental impact assessment, the applicants have to present a statement by the relevant institutions for exception of the rule for environmental impact assessment.

Priority Axis 2 – Improvement of the Quality of Life

The overall objective of this Priority axis is to stipulate cooperation for protection of nature and specific fields of environment, protection of historical and cultural heritage as well as provision of assistance in emergency cases.

The axis is split in two key areas of intervention, referring to protection of environment, nature and historical and cultural heritage and capacity building for sustainable use of natural resources, cultural and historical heritage

Key Area of Intervention 1 – Protection of environment, nature and historical and cultural heritage

The list of actions includes but is not limited to:

(1) "Soft" measures

- Establishment of cross-border integrated approaches, networks and cooperation between the existing environmental institutions (e.g. environment protection agencies, administrations of the protected areas) for the maintenance of the sustainability of ecosystems and protection of the natural environment by development and implementation of joint/correlated management plans and joint solutions for nature protected areas and biodiversity safeguarding, by development and implementation of joint plans/educational/training programmes for pollution prevention, deforestation and soil erosion prevention;
- Activities aimed at strengthening of cross-border collaboration of cultural institutions/organisations by creation of new common cross-border cultural products and services, development of cultural tourism, joint studies on cultural heritage, elaboration of models for management of cultural sites, etc;
- Development of new cross border integrated rural tourism products covering the whole tourism cycle – destinations, services and skills development, interpretation programmes, marketing, promotion, etc.
- Cultural cooperation through development of joint traditional and new festivals, exhibitions, cultural events, encouragement/revitalization of traditional craftsmanship, traditional customs and cultural heritage;
- Initiatives promoting historical and cultural heritage in the cross border area;

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- Development of joint early warning systems for prevention of natural and technological disasters;
- Joint studies on climate change impacts on the area and joint action plans for reducing these impacts;
- Activities for mitigation of environmental pollution in mining sites (for example, exchange of experience, cross-border studies, elaboration of sustainable management plans, etc.);
- Pre-feasibility and feasibility studies and Environmental Impact Assessments;
- Development of detailed plans, detailed project designs, architectural and engineering designs, mapping (in line with the national legislation of partnering countries), and preparation of necessary documentation for investment under this particular key area of intervention;
- Research and information services – creation of Data Bases, Internet platforms, Technical Studies, etc;
- Implementation of programs and systems for observations, data gathering, data storage and dissemination, including institutional capacity building.
- Implementation of activities for improvement of forest management and sustainable usage of local natural resources, including collection of non-forest products (herbs, mushrooms) ensuring sustainable use of those and public awareness campaigns for promotion of nature protection.

(2) "Investment" measures

- Improvement and re/construction of small-scale infrastructure addressing natural and cultural sites;
- Restoration, prevention and conservation of important areas, species and habitats (remediation of impacted areas, including destroyed by fires, replanting, wetland restoration, revitalization of populations of endemic species, enrichment planting, etc.).
- Creation/renovation of marks - boards, pointers, map schemes, trail marking, interpretation/directional boards, etc., according to the established nomenclature, maps and written guides.
- Re/Construction or rehabilitation of a modern tourism infrastructure - camping grounds and associated facilities adjacent to areas of high natural value; systems of walking paths, hiking trails, eco-paths, riding trails; creation of zones and facilities for rock climbing, water sports; creation and equipment of rest places, fire safe picnic places and related supervision (as per the requirements of national legislation where the place of the action is settled).
- Construction of cycling and motor cycling trails in suitable locations (due to the environmental problems created by those activities, areas and routes liable to erosion should not be developed for this purpose. Environmental Impact Assessments must be required for this type of activities).
- Creation and equipment of animal-watching places: bird watchers' and photo-hunters' platforms, wild birds'/animals' feeding places made of aesthetically/environmentally appropriate materials, "Green' and 'theme' eco-paths (ornithological, botanical), educational/scientific itineraries.
- Creation of better infrastructure for tourist visits, including for disabled people, improvement of access and utilities to natural phenomenon/sightseeing and cultural

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spots e.g. stairs, lighting, water supply and sewerage, electricity, heating and ventilation; installation of signs, slopes, toilets, small waste collection facilities, etc.

- Works to improve road access to sights and objects for rural tourism - car-parks, re/construction of roads (with limited length of up to 2 km), recreation zones, etc., and related supervision (as per the requirements of national legislation where the place of the action is settled).
- Re/Construction/refurbishment/rehabilitation of buildings, 'nature based' interpretation / education / visitor centers (these are centers which perform activities aiming at attracting the tourists closer to nature), combined/or not with vocational training of guides, animators, mountain guides, rescue teams etc.
- Development and construction of small-scale infrastructure related to cultural sites; Re/Construction/Rehabilitation of cultural centers/sites and adjacent small infrastructure.
- Small scale investment activities and supply of specialized equipment and technologies related to the nature protection and necessary for implementation of the actions under this component (e.g., purchase and implantation of systems for field observations, data gathering, data storage and dissemination, early warning systems, improvement of forest management, etc.).
- Procurement of equipment and materials - for interpretation, education, visitor or other centers; creation of information systems in tourism information and cultural centers, equipment for cultural events, equipment for monitoring systems (for example for monitoring of humidity and temperature in museums), for ventilating systems, for security systems, etc.
- Small scale investment measures aimed at improving/rehabilitating water wells/springs/ponds and surrounding areas, soil eroded and wet areas, archaeological, ethnographic and folklore spots.
- Preparation or reconstruction of farms for adoption (or conversion to) of technologies for organic aquaculture, farming and stock breeding.
- Small scale investment activities aimed at development of sustainable nature-friendly organic farming, fishery, agriculture and fruit-culture, including cultivation and production of herbs, nuts, medical plants, aromatic species, vegetables, honey products, animal products, mushroom-growing, wild berries, tree-nursery, etc.
- Small scale investment activities aimed at removing the technical barriers through improvement of infrastructure for agriculture/organic waste disposal, herbicides disposal, anaerobic digestion and biogas production, agricultural waste water treatment, etc.
- Activities for permanent protection on the negative effect of flood phenomena – cleaning of rivers beds, relief works, renewal/rehabilitation of water control and water redirection structures such as: protective walls, embankments, dikes, piers; rehabilitation and construction of drainage facilities and infrastructures, creating of small scale hydro-technical structures and other actions for improvement of the cross border flood management, reinforcement of river cross-sections for the purposes of water monitoring, etc.
- Works supervision services related to the small scale infrastructure investments.

IMPORTANT

All works activities should be implemented on a public municipal or public state-owned property. The property should be:

- free of any encumbrances;
- not the object of an pending litigation;
- not the object of a claim according to the relevant national legislation.

All envisaged works activities have to be supported with approved/certified detailed works design, detailed bill of quantities and issued Construction Permit (where applicable according to the relevant legislation³). In case of construction works, for which the relevant legislation do not require approval of a work design and issuing Construction Permit, the applicants have to present a statement by the relevant institutions for exception of the rule for design's approval.

In case of works activities for protection of cultural and historical heritage, the detailed works design for conservation/restoration/construction should be approved by the relevant national institutions for cultural heritage, prior submission of the project proposal.

All supplies have to be supported by detailed technical specification, relevant unit prices and total price.

All prices concerning investment activities have to be in Euro.

All the investment proposals should have positive environmental impact assessment (EIA), if for such kind of activities an EIA is required by the national legislation.

When the relevant legislation does not require positive environmental impact assessment, the applicants have to present a statement by the relevant institutions for exception of the rule for environmental impact assessment.

Make sure that all investments (e.g. infrastructure works) be carried out in compliance with the relevant Community environmental legislation. The procedures for Environmental Impact Assessment (EIA) as set down in the EIA-directive⁴ fully apply to all investment projects under IPA. If the EIA-directive has not yet been fully transposed, the procedures should be similar to the ones established in the above-mentioned directive. If a project is likely to affect sites of nature conservation importance, an appropriate nature conservation assessment shall be made, equivalent to that provided for in Article 6 of the Habitats Directive⁵.

Key Area of Intervention 2 – Capacity building for sustainable use of natural resources, cultural and historical heritage

Indicative operations

(1) "Soft" measures

- Joint research studies, information and know how exchange on cross-border area's natural resources protection, exchange of best practices and know-how in the sphere of revival and preservation of the cultural heritage, promotion of natural and cultural sites and their transformation into tourist sites;
- Joint cross-border information and public awareness campaigns focused on environmental protection and nature-friendly behaviour, protection of fragile/vulnerable areas/habitats, on environmental risk prevention and fight against climate change challenges, sustainable use of natural resources and popularization of regulations for collection of non-forest products, emergency readiness, reduction of negative effects of economic activities on the environment and encouraging of friendly environmental economic activities, etc.;

³ Law of Spatial Planning (Official Gazette of Republic of Bulgaria № 1/2001);

⁴ Council Directive 85/337/EEC of 27 June 1985 on the assessment of the effects of certain public and private projects on the environment (OJ L 175, 5.7.1985, p. 40. Directive as last amended by Directive 2003/35/EC, OJ L 156, 25.6.2003, p. 17.

⁵ Council Directive 92/43/EEC of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora (OJ L206, 22.7.1992). Directive as last amended by Regulation (EC) No 1882/2003 (OJ L284, 31.10.2003, p. 1)

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- Establishment of information networks for promotion of common cultural heritage in the region;
- Activities related to marketing and advertising of the cultural, natural and rural sights, such as publishing of brochures and leaflets, promotion of rural products in the particular area, organization of exhibitions/seminars/conferences, creation of data-bases, web pages and multimedia products, identification of the existing needs and trends of the market and development of proper marketing strategies for the products;
- Initiation of partnerships among local stakeholders in the border area and implementation of joint actions aimed at awareness raising, marketing and promotion, capacity building, organization of round tables and workshops for discussing topics related to sustainable rural tourism development and to valorisation of local assets and cultural heritage.

Under both Priority Axis the following types of activities are ineligible:

- Activities concerned only or mainly with individual sponsorships for participation in workshops, seminars, conferences, congresses;
- Activities concerned only or mainly with individual scholarships for studies or training courses or research actions;
- Activities without a real cross-border impact;
- Activities with provisions for financing the usual management activities of the local organizations,;
- Activities that started before Applicants have signed a contract for awarding grants except project preparation activities;
- Activities linked to political parties;
- Charitable donations;
- Activities covered by other Community programmes
- one-off actions such as conferences, round tables, seminars or similar events. These actions can only be funded if they form part of a wider project. For this purpose, preparatory activities for a conference and the publication of proceedings do not in themselves constitute such a wider project;
- actions for which the Partner is already receiving funding e.g. from the Governmental budget, other Community programmes or other funds;
- commercial activities;
- actions which are ideologically biased;
- sub-granting activities (i.e. the use of the grant to make further grants (financial or in-kind) or loans to other organisations or individuals such as for those who are establishing their businesses);
- actions that include provisions to finance the core activities currently carried out by the applicant or (if any) his partners;
- actions supporting establishment or activities of private or public enterprises, and profit-earning activities.

2.5.3 Eligibility of Expenditures

Only "eligible costs" can be taken into account for financial support. The budget is therefore both a cost estimate and a maximum ceiling for "eligible costs". Note that the eligible costs must be based on real costs based on supporting documents. The eligibility of expenditure applies to EU and national contribution.

Recommendations to award a grant are always subject to the condition that the checking

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process which precedes the signing of the contract does not reveal problems requiring changes to the budget (for instance arithmetical errors, inaccuracies or unrealistic costs and other ineligible costs). The checks may give rise to requests for clarification and may lead the Managing Authority to impose modifications or reductions to address such mistakes or inaccuracies. The amount of the grant and the percentage of the EU co-financing as a result of these corrections may not be increased.

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

Requirements for eligible expenditures:

Expenditures must be made according to the:

- Commission Regulation (EC) No 718/2007 of 12 June 2007 [OJ L 170 from 29.06.2007] implementing Council Regulation (EC) No 1085/2006 establishing an instrument for pre-accession assistance (IPA);
- Commission Regulation (EC) No 80/2010 of 28 January 2010 amending Regulation (EC) No 718/2007 implementing Council Regulation (EC) No 1085/2006 establishing an instrument for pre-accession assistance (IPA)
- Practical Guide to Contract procedures for External actions (PRAG);
- Decree № 275 of Council of Ministers from 23/11/2009 laying down detailed rules for eligibility of expenditures under the IPA Cross Border Cooperation Programme between Republic of Bulgaria and Republic of Turkey for the 2007 – 2013 programming period.

Eligible costs are costs actually incurred by the Lead Partner or its partners, which meet all the criteria below.

To be eligible for financial support under the call for proposals, expenditures must:

- be necessary for carrying out the action and must comply with the principles of sound financial management, in particular value for money and cost-effectiveness;
- have been stipulated in the project budget;
- have actually been incurred by the Lead partner or its partners during the implementing period for the actions defined in the application form;
- be recorded in the partners' accounts and tax documents, be identifiable and verifiable, and be backed up by supporting documents;
- be verified and certified as eligible by the controllers designated by the Managing Authority and the National Authority respectively;
- be in line with the provisions of the subsidy contract, European and national legislation;
- have not been subject to financing from any other public funds;
- be effectuated until the end of project. The starting date for the eligibility of expenditure for project preparation is the date of the official approval of the Financing Agreement between the Government of Republic of Turkey and the Commission of the European Communities (May 26, 2009), but not earlier than one year before the date of publication of the present call for proposals. The starting date for the eligibility of the rest of expenditures is the date of signing of the grant contract between MA and Lead Partner.

The expenditures are generally eligible if they comply with the principles of efficient financial management and, if applicable, with the relevant rules for public procurement.

The start date of the project is “the day following that on which the last of the two Parties signs” the Grant Contract with the exception of expenditures for project preparation.

As VAT is not eligible if recovered by a final beneficiary, final beneficiaries claiming costs “inclusive VAT” will have to issue a statement that they do not recover VAT by any means. The final beneficiaries partially recovering VAT have to provide the controllers with the proof of the percentage of non-recoverable VAT.

According to Article 89(3) of Commission Regulation (EC) No 718/2007 by way of derogation from Article 34(3), the following costs shall be **eligible** for a contribution from the IPA:

- (a) value added taxes, if the following conditions are fulfilled:
 - i. they are not recoverable by any means from other sources according to national legislation (for Bulgaria – Bulgarian VAT Act, letter № 91-00-502/27.08.2007 of the Ministry of Finance; for Republic of Turkey - Value Added Tax Act Law No:3065; and Declaration Letter of the Ministry of Finance № 91-00-502/27.08.2007);
 - ii. (ii) it is established that they are borne by the final beneficiary; and
 - iii. (iii) they are clearly identified in the project proposal.
- (b) charges for transnational financial transactions;
- (c) Where the implementation of the operation requires a separate account or accounts to be opened, the bank charges for opening and administering the accounts;
- (d) legal consultancy fees, notarial fees, costs of technical or financial experts, and accountancy or audit costs, if they are directly linked to the co-financed operation and are necessary for its preparation or implementation;
- (e) the costs of guarantees provided by a bank or other financial institutions, to the extent that the guarantees are required by national or Community legislation;
- (f) overheads, provided they are based on real costs attributable to the implementation of the operation concerned. Flat rates based on average costs may not exceed 25% of those direct costs of an operation that can affect the level of overheads. The calculation shall be properly documented and periodically reviewed.
- (g) The purchase of land for an amount up to 10% of the eligible expenditure of the operation concerned

📌 IMPORTANT

In-kind contribution is not eligible expenditure!

📌 IMPORTANT

Under the authorization of JMC the MA/NA reserve the right to perform negotiations and applied budget reductions after evaluation and based on the recommendations provided by the assessors and the Assessment Working Group!

List of Eligible Expenditures

📌 IMPORTANT

The total sum of the maximum rates of the budget lines listed below exceeds 100 %. In real project proposals with real expenditures the amount should be 100 %. The minimum rate in Budget line 6 for investment projects is obligatory and may be ground for rejection of the project proposal. For other Budget lines, **the below mentioned thresholds are strongly recommended and will be observed during the evaluation of the project proposals.**

BUDGET LINE 1: Project management costs – maximum 25 % of total eligible project costs for “soft” projects and maximum 15 % of total eligible project costs for “investment” projects *

Staff involved in project implementation remuneration. Including all expenditures related to the offices as:

Sub-line	Eligible expenditures
Project staff* remuneration	<p>Administrative staff is:</p> <p>Project Manager, Coordinator, Accountant, Assistant. The members of the project staff perform periodically repetitive actions related to the organization, coordination, management and reporting of the activities and results related to the project during the project period. For all Bulgarian beneficiaries this suggests that the appointment of duties to the members of the project staff will be done through the use of:</p> <ul style="list-style-type: none"> • Labor contract/second Labor contract or addendum to the labor contract in accordance with the Labor Code. • For persons employed under civil servants contract, an Order by the Head of the Administration must be issued to determine the project team. The expenditure on the team members' remuneration are reported proportionally to the work performed during the project implementation through a report for the hours worked on the project (time sheet). <p>The costs of the administrative staff executing tasks for the project management and/or tasks for the project activities are eligible under the following conditions:</p> <ul style="list-style-type: none"> - members of the project team should be directly employed by the project organisation on the basis of a regular work contract (or any similar type of contract according to the national rules) between themselves as employees and the project organisation as employer. - Contribution of civil servants as “employees” of a partner organisation can be considered eligible under budget line “staff costs”. - The employee could work full-time or part-time for the project. <p>The units which can be used for the sub-line are “month” and “hour”. “Per month” shall be used for full time employment, “per hour” - for the part time employment. The employment (full or part time) shall be indicated together with the respective position and it should reflect to the unit rate (maximum amount of unit rate can be used only for full time employment). Maximum amount of the unit rate can be based on the average amount for the respective region and position.</p> <p>If it is necessary the organizations can employ/contract external technical experts for implementation of project activity/activities but not regular tasks (legal expert, procurement expert, trainers etc.) according to Bulgarian Obligations and Contracts Act (OCA). The costs for those experts shall be budgeted under the budget line 5 “External expertise and services”.</p>

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Rent of office	Expenses covering rent of office for the purpose of the project.
Overheads	Expenses covering electricity, heating, water etc.
Consumables	Expenses covering paper, pens, diskettes, folders, toners etc.

* **Thresholds for staff remuneration are calculated on the bases of: maximum budget and length of a project, a team of 4 members for the "soft" projects and a team of 6 members for the "investment" projects and full time employment of the members. Increasing the average monthly team member salary by reducing the length of the project or by introducing part time employment, while keeping the maximum threshold amount is not recommended and can lead to lower scores in the technical evaluation and/or negotiations for budget revision.**

BUDGET LINE 2: Travel and accommodation - maximum 15 % of total eligible project costs for "soft" projects and maximum 10 % of total eligible project costs for "investment" projects.

This budget line will cover the expenses for the project staff members from both countries (project staff and/or direct beneficiaries) in events taking place in the two partnering countries, as follows:

- events related to the project (technical meetings, meetings of joint working groups, meetings of the project team etc. ,workshops, trainings & seminars)
- business trips related to the project activities;

Sub-line	Eligible expenditures
Travel costs	<p>Travel costs will usually cover expenses for:</p> <ul style="list-style-type: none"> • train tickets; • bus tickets; • rent of vehicle for the operation; • car/mini-bus travels (expenditure for fuel/kilometer, insurances for cars, green cards, motor way taxes, vignettes, etc.): • medical insurances; • visa expenditures; <p>⚡ IMPORTANT Total number of kilometers should be determined in the project proposal in compliance with the project scope. The expenditure for fuel of personal vehicle, vehicle of the organization or rent vehicle is budgeted in kilometers. In the sub-line shall be budgeted expenses for fuel of vehicle used for events.</p>
Daily allowances	<p>Daily allowances In the eligible border region of the two partnering countries daily allowances are € 20; Outside the eligible area daily allowances are € 35.</p>
Accommodation	<p>Accommodation costs In the eligible border region of the two partnering countries the accommodation costs are up to € 60; Outside the eligible area the accommodation costs are up to € 130.</p>

BUDGET LINE 3: Meetings, conferences, events

Costs for organization of meetings, seminars, press conferences, awareness campaigns, trainings, evaluation committees etc. include:

Sub-line	Eligible expenditures
Rent of hall	Expenses for rent of halls – for meetings, trainings or evaluation

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	procedures; (proposed unit rate – per hour)
Rent of audio/video equipment	Expenses for rent of equipment, including: <ul style="list-style-type: none"> • translation equipment; • audio equipment; • video equipment; • other related to the purpose of the event equipment.
Coffee breaks, refreshments etc.	Expenses for coffee breaks, refreshments, catering, business diners and lunches for all participants in the events; ⚠ IMPORTANT The costs are only eligible if stated clearly and easily visible on the invitation/agenda. Expenditures for alcoholic beverages and cigarettes are not eligible
Preparation of materials	Expenses for preparation of materials supporting the events (invitations, agenda, presentations etc.);
Consumables	Expenses for consumables as paper, files, folders, cases, diskettes, compact disks, etc.
Rent of vehicle for event	Expenses for rent of vehicle for event.
Accommodations for participants in the events	Expenses for direct beneficiaries, target groups, participants in the events, etc. In the eligible border region of the two partnering countries the accommodation costs are up to € 60; Outside the eligible area the accommodation costs are up to € 130.

⚠ IMPORTANT

In each budget sub-line the expenses shall be budgeted as per event and per participants in accordance with the description of the project activities.

BUDGET LINE 4: Information and publicity

Sub-line	Eligible expenditures
Purchase of advertising materials	Expenses only for purchase of advertising materials as pens, key chains, CDs, USBs, hats, bags, note books, folders etc.
Elaboration, design, translation, etc.	Expenses for elaboration, design, translation, publishing or printing of: <ul style="list-style-type: none"> • information materials (concerning the project documents, implementation provisions etc.) • brochures, leaflets (informing about the project's implementation and results); • manuals and guidelines (related to the project); • design of project's logo. • design and printing of advertising items with the logo of the project or with the logo of the programme (pens, key chains, CDs, USBs, hats, bags, note books, folders).
Publications in mass-media	Expenses for publications in press and broadcasting in mass-media (radio, TV).

BUDGET LINE 5: External expertise

Sub-line	Eligible expenditures
Consultancy,	Expenses for feasibility studies, surveys, technical expertise, legal advice,

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studies, designs etc.	elaboration of works design/specialized software/web-pages, etc.
Authorizations, certificates, etc.	Expenses for obtaining authorizations, certificates, agreements, permits etc. related to elaboration of documents, supplies and works. Bank charges for transnational financial transactions ; Bank charges for opening and administering the separate bank account(s) required by the programme only for the Lead partner;
Interpreters, lecturers, trainers	Expenses for interpreters, lecturers, trainers

BUDGET LINE 6: Investments - minimum 60 % of total eligible project costs in case of "investment" project. This threshold is obligatory for "investment projects". Maximum 25 % of total eligible project costs in case of "soft" projects. This threshold is obligatory for "soft" projects.

Sub-line	Eligible expenditures
Purchase of land	Expenses for purchase of land – only in exceptional cases when it is absolutely necessary for the project implementation. Has to be well justified providing all documents for evaluation of the value of the land. Value of the land should be certified by an independent qualified appraiser or duly authorized official body.
Small scale construction	Expenses for land preparation – any works aimed at making the land suitable for the purpose of the project (removal of unnecessary materials and vegetation, drainage etc.); Main investment (construction, reconstruction, rehabilitation, widening and modernization of the building(s)/site(s) and the related installations). Connection to utilities: power connection, water supply and sewage connection, gas connection etc. Site organization: places for workers and equipment, waste removal, fences etc. Expenses for land rehabilitation after completion of works and/or environment protection activities; Expenditure for supervision (if necessary) – in compliance with the relevant national legislation
Supply*	Expenditure for purchase and rental of IT equipment and furniture ; Expenditure necessary to bring the equipment to working condition ; Expenditure for purchase of software ; Purchase of vehicles is eligible provided that they are mandatory for achieving the project objective (i.e. specialized vehicles for interventions in case of disasters).

*** For equipment that will not be used by the project partners or the project target group after the project completion and if the economic lifetime of the equipment (respectively – the period of amortization) is longer than the project duration, only the depreciation costs for the period of project duration are eligible.**

The depreciation rate has to be in line with national rules.

Depreciation is charged proportionally for each relevant period for which a periodical report is required and prepared. The full value of depreciated costs on equipment in relation to the total

Guidelines for Applicants

project duration cannot be charged as total amount for one particular period.

Only the proportionate sum of the depreciations costs according to the use of equipment for the project is eligible. The amount (percentage used and time duration) has to be properly clarified (auditable).

The depreciation costs of equipment can never exceed the purchase price of the equipment.

BUDGET LINE 7: Others – maximum 10 % of total eligible project costs

Sub-line	Eligible expenditures
Project preparation	<p>Expenses for project preparation (meetings between partners, consultancy, studies, translation of documents, feasibility studies, detailed project design and other technical documentation, fees, charges and other supporting expenditure) carried out before the Subsidy contract is signed.</p> <p>📌 IMPORTANT Expenditures are eligible from the date of the Financing Agreement between the Government of Republic of Turkey and the Commission of the European Communities (May 26, 2009), but not earlier than one year before the date of publication of current call for proposals. If necessary contracting PRAG rules shall be applied. Maximum 3 % of total eligible project costs. NB: Payment of a grant towards the cost of Project Preparation, will only be made to those applicants whose projects are approved for grant. Otherwise, this cost is not recoverable.</p>
Other specific for the project	<p>Specific activities foreseen in the project that cannot be put down under any of the above budget lines. Those costs are eligible only if they are detailed in the explanatory documents, according to the complexity of the project.</p> <p>📌 IMPORTANT Maximum 2 % of total eligible project costs.</p>
Contingency	<p>📌 IMPORTANT Maximum 5 % of total eligible project costs.</p>

📌 **IMPORTANT**

Before filling an application form each beneficiary should clarify its VAT status and determine the VAT as recoverable or non-recoverable for each activity.

The eligible VAT (non-recoverable from other sources) shall be filled in row "Eligible VAT". The amount of unit rates shall be VAT excluded.

Ineligible expenditures

1. According to Article 34(3) and Article 89(2) of Commission Regulation (EC) No 718/2007 the following costs **shall not be eligible** for a contribution from the IPA:

- (a) taxes, including value added taxes;
- (b) customs and import duties, or any other charges;
- (c) rent or leasing of land and purchase, rent or leasing of existing buildings;
- (d) fines, financial penalties and expenses of litigation;
- (e) operating costs;
- (f) second hand equipment;

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- (g) bank charges, costs of guarantees and similar charges;
- (h) conversion costs, charges and exchange losses associated with any of the component specific euro accounts, as well as other purely financial expenses;
- (i) contributions in kind;
- (j) interest on debt

with exception the derogation given in Article 89(3) of Commission Regulation (EC) No 718/2007 and in Article 1(26) Commission Regulation (EU) No 80/2010 of 28 January 2010 amending Regulation (EC) No 718/2007”.

2. In addition to the above the expenditures concerning the actions listed below shall not be eligible:

- Actions concerned only or mainly with individual sponsorships for participation in workshops, seminars, conferences, congresses;
- Actions concerned only or mainly with individual scholarships for studies or training courses;
- Actions with provisions for financing the usual management activities of the local organizations;
- Actions that started before Applicants have signed a contract for awarding grants except project preparation activities;
- Actions linked to political parties;
- Charitable donations;
- Activities covered by other public funds.

📌 IMPORTANT

In addition to the above a detailed instruction on how to complete the project budget is given in these Guidelines for applicants – Application Form Part III.

2.6 How to Apply

The financing under the Bulgaria –Turkey Cross-Border Cooperation Programme is available to potential beneficiaries through a competitive process.

The submission of projects is open to all potential beneficiaries that meet the eligibility criteria.

2.6.1 How to get the Applicants' Package

The Applicants' Package contains the Guidelines for Applicants, Application Form, Annexes and Supporting documents. These are the official forms that should be submitted when applying for financial support under the programme. The Guidelines for Applicants provides potential beneficiaries with detailed guidelines on the application for funding process.

The Applicants' Package is available on the following websites:

- MA website: www.mrrb.government.bg
- NA website: <http://www.abgs.gov.tr>
- Joint Technical Secretariat's website: www.ipacbc-bgtr.eu
- Bulgarian Ministry of Finance's website: www.eufunds.bg

Applicants may submit questions of substance in writing up to 21 calendar days before the deadline for submission of proposals. The JTS will reply no later than 11 calendar days before the deadline for the submission of proposals.

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Questions may be sent by e-mail or by fax to the address listed below, indicating clearly the reference of the Call for Proposals - No. 2007CB16IPO008 – 2011 – 2:

Fax: ++359 38 663 888

E-mail: ma_cbc_bg_tr@yahoo.com

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

Questions that may be relevant to other applicants, together with their answers, will be published on the internet site: www.ipacbc-bgtr.eu, www.mrrb.government.bg, <http://www.abgs.gov.tr>

2.6.2 How to fill in the Application Form and its Annexes

Application Form and Annexes must be submitted using the forms included in the Applicants' Package.

The Application Form and Annexes must be filled in English. The Supporting documents issued by national/local authorities or other bodies shall be attached in the original language accompanied by a translation in English.

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

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

Make sure you fill in the documents by computer; hand-written applications will not be accepted.

📌 IMPORTANT

Modifying the standard application form or Annexes will result in the rejection of your application.

All pages should have written by hand consequent page number, in the lower right corner (which will continue from the Application Form until the last page of the last annex).

Application Form

Application Form Cover:

The project title and the name of the Lead Partner organization should be stated in English and in brackets – in the native language. Priority axis No. and Key area of intervention (Measure) no. should be taken from the table shown at item **1.1.4. Programme priority axis** of this document.

Application Form PART I

📌 IMPORTANT

Please fill the information below for every project partner starting with No 1 for Lead partner / beneficiary

1. Identity

1.1. Detailed information

State the official and *full name* of the organisation.

State the official address, legal representative, telephone, fax and e-mail.

If the partner is a regional/local branch with legal personality, it should be mentioned.

The names of all the partner organizations should be stated both in their native language and in English. The "legal status" field should be filled in with the type of organization (from public sector - Public body or Public equivalent body and from private sector - Non-profit organisation).

Public sector

- Public body - legal entity established and governed by public law assigned with specific competences and tasks performed in public interest (e.g. national, regional, local authorities).
- Public equivalent body - legal entity that has to fulfill the following criteria:
 - established under public or private law mainly for the specific purpose of meeting needs in the general interest;
 - having legal personality (including non profit organisation with public financing);
 - financed, for the most part, by the State, regional or local authorities, or other bodies governed by public law; or subject to management supervision by those bodies; or having 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

Private sector

- Private non-profit organisation - legal entity whose primary objective is to support private interest or public concern for non-commercial purposes, without concern for financial profit (e.g. foundations, civic associations with private financing only).

For the all partners including the Lead Partner organization, the name and position of the legal representative are requested.

The Lead Partner and the partners must present data regarding the object of activity and the tax registration number.

The *Lead Partner* is, as lead beneficiary, responsible for the implementation of the entire project. The Lead Partner will be the addressee of the entire correspondence during the application evaluation process and will also be responsible for reporting to the JTS after approval of the project. More information about the role and tasks of the Lead Partner are stipulated in the grant contract template annexed to this Guide.

1.2. Partner profile

State the past experience (over past 3 years) in territorial co-operation actions.

State the specific role of each partner in the implementation and management of the current project. If the Lead Partner participates as a partner in other project proposals under the present Call for Proposals, these project proposals should be clearly stated by the Lead Partner.

1.3. Partner experience

State already financed and implemented projects (maximum 10 per project partner).

Here the project partners must state if they have ever received financing from European funds. Here partners must provide detailed information about those projects (maximum three projects per project partner).

2. Financial data

2.1. Detailed information

State national registration code, VAT registration, IBAN, BIC, bank details

2.2. Financial status, capacity and equipment

The project partners must state information concerning annual turnover, number of full time staff, number of part time staff, number of offices and equipment.

Application Form PART II

1. Project identity

1.1. Project title

State the official and *full name* of the project and acronym.

State priority and priority measure of the project. Priority axis no. and Key area of intervention no. should be taken from the table shown at section 2 - **item 2.2.2. Programme priority axes** of this document.

1.2. Project duration

State the project duration in months.

1.3. Cross border character of the project

In order to prove the cross-border character of the project you must explain which of the following criteria are fulfilled (**minimum one**): Joint Development, Joint Implementation, Joint Staffing, Joint Financing (please refer to section 2 – General requirements).

1.4. Cross border impact of the project

The applicants must provide information regarding the cross-border impact of the project. As it could be seen in the Evaluation Grids, the cross-border impact of the project is assessed under the Technical and Quality Evaluation No. 12.

2. Financial information

2.1. Sources of financing (EUR)

State the information concerning total value of the project (based on eligible costs), total value of the EU funds, total value of the national co-financing and if applicable - own contribution.

2.2. Breakdown of eligible expenditure per year (EUR)

The partners shall describe eligible expenditures planned (per Budget Lines as included in Application Form – Part III – table 3).

3. Project description

3.1. Consistency with programme strategy

All projects in Bulgaria – Turkey IPA Cross Border Programme must comply with the *strategy set out in the Programme*. This can be demonstrated by explaining the foreseen contribution of a project to the aims of the programme. Project partners should explain briefly and clearly how their project will contribute to the aims of the programme.

In this area the partners must explain how the project complies with the programme strategy and state the priority axis, key area of intervention and indicative operation aimed by the project.

In case the project envisages activities which might contribute or influence another priority axis or key area of intervention or indicative operation, explanations are to be given in this section.

3.2. Project objectives

The projects should set its own clear objectives (general and specific), in line with the programme objectives. It must be explained how the project objectives comply with the objectives of the programme and of the priority axes.

3.3. Background and demand for the overall project

Project partners should provide a clear description of the problem which the project is going to tackle and the contribution which the project will make to help solve it. It is recommended to describe what is new about the project in relation to what has been previously achieved – including other supported by EU activities and other projects and programmes in the area – and in relation to what will be achieved in this area in the future. It should be described why the chosen partnership is necessary for the project. Furthermore, the level of achievements of the project should be justified in terms of having a long-lasting impact from its final results.

3.4. Description of the target groups, beneficiaries and estimated number

The project partners should provide clear description of the target groups, beneficiaries and estimated number.

“Target groups” are the groups/entities who will be positively affected by the project

“Direct beneficiaries” are those directly involved in the project implementation

“Final beneficiaries” are those who will benefit from the project in a long term

3.5. Project activities

Project partners should fill in the activities planned to achieve the objectives as set out in 3.2. Please state the location of each activity and the responsible partner for each activity.

3.6. Duration and action plan

For each activity must be clearly stated the starting date, the completion date and duration.

4. Monitoring indicators

4.1. Expected outputs and results

Output and Results indicators allow measuring the achievement of the quantitative targets presented in the Application Form. When preparing their Application Form, the applicants should provide quantification of those programme's indicators that are relevant to the project outputs and results, following the instruction given in the “Methodology of output and result indicators”⁶, elaborated by MA.

Filling the “quantities” in the specific sections of the Application Form, the applicants have to strictly follow the programme units for each indicator. Please note that the quantities are:

- in “Number” for all output indicators,
- in “Percentage” (%) for all result indicators with exception of indicator “*Joint information services established*” in Key Area of Intervention 1.2. “*Economy Competitiveness increasing*”, which shall be measured in “Number”.

In the “justification” field of the result section, the applicants must describe the sources of verification of the results' achievement.

During the implementation period, the Lead partner provides information about achievement of the project's outputs and results in the Project Progress Report from the start till the end of the project.

Generally, all target values of indicators must be reached before the completion of the project and the source of information is the Final Progress Report, provided by the Lead partner.

⁶ The document is available on the Programme's web-page: <http://www.ipacbc-bqtr.eu/eng/page/documents/others>

4.2. Multiplier effect

Describe the possibilities for replication and extension of the action outcomes.

4.3. Sustainability

The applicants should explain how the sustainability of the outputs and results of the project will be ensured after completion of the action. This part should include aspects of ownerships; necessary follow-up actions and resources for maintenance of the outputs delivered under the project; built-in strategies; etc. The Lead Partner and project partners should ensure the sustainability of the project results not less than five years after completion of the implementation period in terms for investment support projects and not less than 2 years after completion of the implementation period in terms for soft measures projects.

Please note, that in accordance with the Article 57(1) of Regulation (EC) No 1083/2006, the project retains the contribution from the Funds only if that project does not undergo a substantial modification:

- affecting its nature or its implementation conditions or giving to a firm or a public body an undue advantage; and
- resulting either from a change in the nature of ownership of an item of infrastructure or the cessation of a productive activity.

5. Project coherence with

5.1. Other programmes/strategies

The project partners should identify those regional/national/European programmes or strategies in the field to which the application refers and demonstrate the coherence of the project to the respective documents/actions if applicable.

5.2. Other projects

The project partners must identify projects to which the present application has complementary/ upgrading /multiplier impact.

5.3 Horizontal themes

Explain how your project will contribute towards the promotion of the three *horizontal themes* (equal opportunities, environmental impacts and Innovative elements/methods).

If a negative impact is envisaged, for any reason, then it should be clearly explained as to how such effects will be minimized or otherwise offset.

6. Management of the project

6.1. General coordination and management including administrative and financial aspects

The role and responsibilities of the Lead Partner and project partners should be clearly described.

In general Lead Partner is responsible for the overall coordination, management and administration of the project and project partners are responsible for definite activities.

The Lead Partner and the project partners should draft and sign a Partnership Agreement, which clearly defines the roles and responsibilities of each partner. A template for the Partnership Agreement is included in the application package, indicating the minimum standards of the Partnership Agreement. The concrete agreement for the project can be extended and more detailed.

📌 IMPORTANT

A partner can never be a contractor and vice versa!

Please note that a "partner" involved in the project implementation as "Lead Partner" or "project partner" is excluded from any forms of contracting to other partners within the project.

6.2. Team proposed for project implementation

The project partners should provide information regarding the project management staff and their roles and responsibilities in the project.

The following unified names of the positions within this part of the Application Form, as well as in BL1 in the budgets should be used:

- a. Project Manager
- b. Coordinator for ...
- c. Accountant
- d. Assistant ...

The Manager and the Accountant are compulsory position in the team (unless management and financing are issues of external expertise. Coordinator could be appointed either for a separate partner, or for a group of partners, but also for activities performed on Bulgarian or Turkish territory or on the territory of certain administrative units. Of course, the Coordinator is not a compulsory position. The expert is a specialist, qualified in certain field, while the Assistant performs routine technical tasks. The name of the position has to reflect also the nature of their duties. The project team cannot be constituted by only a Manager and an Accountant. Under each position the name of the person whose CV is attached must be fulfilled. It must be stated as well which partner is nominating the proposed position in the team.

Each position of the team must be pointed out in Budget line 1 of the Application Form as well, regardless of the fact is it paid by the project budget or not. The one not paid will remain with "0" for budget expenses. In this respect the number of the positions shown in the current section must be equal to the number given in Budget Line 1 of the Application Form. For positions paid under budget line 1 "Administrative costs" expenditures for staff are not eligible if staff is hired on the bases of **civil contract for service**.

Partners should propose a balanced team in terms of experience, competences and capacity.

7. Information and publicity

According to the EC Regulations and the Programme, the project partners must promote their projects and the added value of the Community funds. The communication activities should promote the fact that the project financing is provided from the European Union (under the Instrument for Pre-Accession Assistance) and ensure the adequate presentation of the project and the European cooperation.

The plan of the information and publicity activities has to be in accordance to the specific goals and target groups of the particular project. In general it is advisable the beneficiary to include as promotion activity organization of at least one final public event. Within a project the Lead Partner or each of the partners in the project must perform communication and promotion activities (media campaigns, events, promotional and informational materials, electronic channels etc). All project partners shall indicate concrete measures to be taken in this respect and also in order to disseminate the project results. All costs for proposed measures need to be included in the financial plan for the project and accounted for in the Budget Form. It should also mention who will benefit from the project and it might also specify other target groups such as authorities on different levels, enterprises, NGOs, other projects concerning the same issues as the proposed project, the general public and the mass media. These activities must be eventually evaluated to establish the impact they had on the target groups (the means and methods of evaluation should be mentioned in the table).The beneficiaries will accept to be included on a list containing the following information: the names of the beneficiaries, the titles of the projects and the amounts of public funding allocated to the respective projects.

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Table 1 – TOTAL BUDGET PER PROJECT PARTNERS

In Table 1 – fill names of project partners starting with PP1 (Lead partner) and country code. Total financial contribution will be automatically filled after you finish the AF part III.

Table 2 – DETAILED BREAKDOWN OF BUDGET LINES PER PARTNER (PP1, PP2, PP3 etc.)

All project partners fill a separate Table 2 – answering to their number in Table 1 (PP1, PP2, PP3 etc.) giving a breakdown of the expenditures that each of them will be responsible for during the project implementation. The figures in the column “Unit rate” should be without VAT.

The amount of eligible VAT (in total) is not calculated automatically and should be filled by every partner in row “Eligible VAT” in the end of Table 2. Table 2 – DETAILED BREAKDOWN OF BUDGET LINES PER YEARS will be automatically filled and will provide a detailed summary of the project costs per Budget lines and Sub-lines.

📌 IMPORTANT

It is very important for proper evaluation, implementation and reporting of the project every project partners to fill Table 2 carefully, precisely and logically to the project activities. The use of the right units (hour, day, month, kilometres, etc.) and number of units in the budgeting process avoid future problems in reporting and more important, in reimbursement of expenditure. For example: unit “per month” means 8 hours, 22 working days; “part time” is not a unit; two days seminar does not always mean three accommodations and four daily allowances.

Table 3 – SUMMARY BREAKDOWN OF BUDGET LINES PER YEARS

Table 3 will be filled automatically providing a summary of the project costs only per BLs and years – this is the table that has to be inserted in AF part 2, item 2.2.

Table 4 - SUMMARY BREAKDOWN OF BUDGET LINES PER PROJECT PARTNERS

This table will be filled automatically providing information for the distribution (balanced/unbalanced) of the project budget between project partners.

Table 5 – PROJECT SOURCES/PARTNERS’ CONTRIBUTION

In Table 5 the sources of national co financing should be inserted – 15 % state co-financing is provided and if applicable (not compulsory) own contribution and/or other sources.

📌 IMPORTANT

EU co-financing should not exceed 85% of the total project costs.

PARTNERSHIP AND COFINANCING STATEMENT- automatically filled. Additionally each project partner should fill name and position of the legal representative and date. After printing the statement has to be signed and stamped.

📌 IMPORTANT

The Managing Authority reserves the right to propose to the JMC reduction of the project costs if they are deemed excessive.

3 Annexes

3.1 Annexes (A)

The following Annexes should be filled according to the template and submitted together with the Application form:

A1. Project summary

The project summary contains: The title of the project, the name and country of the Lead Partner, the names of the other partners, the priority axis under which the project is categorized by the applicant, the area of intervention, the duration (in months) of the proposed project, total budget (in €) of the project, the objectives of the project, the activities of the project, the results of the project, and the target groups towards which the project is aimed.

📌 IMPORTANT

Project summary should be filled in English, Turkish and Bulgarian according to the template in Annex_A.1. In case of inconsistency between the three versions, the English version shall prevail.

A2. Logframe Matrix

A3. CVs of the project management team

A4. Partnership Agreement

A5. Declaration of eligibility

A6. Sworn Statement

A7. Declaration of Commitment

3.2 Supporting Documents (B)

The following Supporting documents should be provided and submitted together with the Application form:

B1. Documentary and other evidence (in original or certified copy and English translation, stamped and signed by respective organization as true copy) on the most recent legal status of all partners. (issued not later than 6 months prior the date of application). In the cases when the applicable document does not show the legal representative of the organization, additional document should be provided (the act of appointment/nomination, decision of municipal election commission, etc.) showing clearly the name of the person with representative authority.

The document on the recent legal status should indicate also the date of establishment of the organization, the place of establishment (registration) and scope of territory competence (if applicable), and it should prove the eligibility of the organization in accordance to all criteria stated above in section 2.2.1. In case the issued document does not justify all of the above circumstances, other documents could be provided, like the act of establishment or certificates from superior authorities (Ministries, Agencies, District governments, Inspectorates).

B2. Copy and English translation stamped and signed by respective organization as true copy of the partners' accounts - Annual Balance Sheet and Profit and Loss Account for 2009 and 2010 /if completed/

In case an organization acting as partner, according to national legal requirement does not prepare its own accounts – an excerpt from the Annual Balance Sheet and Profit and Loss

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Accounts of the principal organization (which prepares and administers partner's budget) has to be presented, stating the positions (Assets and Liabilities, Incomes and Expenditures) concerning the respective partner's organization.

Please note that Annual Balance Sheet is assumed as a financial statement which summarizes an organization's assets, equity and liabilities by the end of the fiscal year. Its main parts are:

I. Assests – Fixed Assets (Intangible fixed assets, Tangible fixed assets, Financial assets); Current Assets (Stocks, Debtors due and payable after more than one year, Debtors due and payable within a year, Cash at bank and in hand, Investments, etc.)

II. Liabilities – Capital and reserves (Subscribed capital, Revaluation reserve, Legal Reserve, etc.), Creditors (amounts falling due within one year and more than one year)

Profit and Loss Account or Income Statement is assumed as a financial statement that summarizes the revenues, costs and expenses incurred during a fiscal year.

B3. Copies of the partners' national registration code and certificate for VAT registration (if applicable), accompanied by English translation stamped and signed by respective organization as true copy.

Bulgarian partners have to present copy of BULSTAT registration and the Turkish partners – certificate from the tax office indicating TAX number.

B3.1.A certificate from the Tax office for a VAT registration (or the lack of such) has to be provided also from the partners.

B4. Copies of the partners' certificate issued by the relevant body (National Income Agency, Tax office, Social Security Office) **for lack of obligations** (taxes and social security duties) issued not later than 6 months prior the date of application or plan for rescheduling of the debts if existing (accompanied by English translation **stamped and signed by respective organization as true copy**) .

Please note that Turkish partners have to present two separate certificates – for lack of tax obligations and for lack of obligations to the Social security system.

Some of the certificates under section B3, B3.1 and B4 can be issued in one document if the national legislation permits it.

B5. The applicants have to annex a Decision of Local Council/ Board of Directors/ any similar body or managing person regarding the project development and implementation – original or certified copy and English translation **stamped and signed by respective organization as true copy**. This decision will indicate the legal representative of the partner.

Decision for project development and implementation has to be provided in all cases, no matter whether sole or collective managing authority takes the decisions in the organization.

In the cases where the executive authority is different from the collective managing body (i.e. Mayor and Municipal Council), the decision has to be taken by the second one.

B6. Legalized mandates of delegation from the legal representatives of partners (in case the application form and annexed declarations are not signed by the legal representatives of the Lead Partner/partners) – **original** and English translation **stamped and signed by respective organization as true copy**.

In case the signatures are of a deputy by rights, the act certifying the substitution by rights has to be presented together with the act for nomination of the person at the position of a deputy. When giving a mandate of delegation the legal representative has to present evidences that his/her rights for delegation are not limited by any means.

B7. Supporting documents concerning INVESTMENT SUPPORT ACTIVITIES ONLY

B7.1. In case investment activities will be performed on **public** property:

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- Ownership act or certificate (or other legal document according national legislation) for public ownership of the tangible assets, which will be subject of works activities together with recent outline/design of the property - certified copy and English translation **stamped and signed by respective organization as true copy**
- Consent of the owner, clearly stating that the assets are given for free right of use for the purpose of the project at least for 5 years after end of the project - certified copy and English translation **stamped and signed by respective organization as true copy.**

The consent should be signed by the person/body with the decision-taking authority (e.g. the Municipal Council, not the Mayor).

Consent of the owner is necessary in all cases even when the partner is the owner of the assets. In case the assets are owned by a partner the consent can be given in the same act (document) as the one containing the Decision for project development and implementation described in section B5.

B7.2. In case of investment activities required passing through private territories the consent of the owners must be obtained and presented in a due legal form and copy of the ownership act - certified copy and English translation **stamped and signed by respective organization as true copy.**

B7.3. In case of investment activities within territories/objects with special status (National parks, environmental and architectural reserves, cultural monuments, protected areas, areas included in Nature 2000 etc.) relevant documentation (permits, approvals, certificates, statements, etc.) required by the respective national applicable law - certified copy and English translation **stamped and signed by respective organization as true copy.**

Please note that in case of construction activities concerning renovation/restoration of cultural monuments: relevant documentation required by the respective national legislation (original or notary certified copy) should be duly applied;

B7.4. Copy of letter issued by the relevant body clearly stated that Environmental Impact Assessment is not necessary - certified copy and English translation **stamped and signed by respective organization as true copy.**

OR

Copy of positive Environmental Impact Assessment (positive opinion from the relevant body), required by the national legislation - certified copy and English translation **stamped and signed by respective organization as true copy.**

B7.5. Approved detailed works design and Construction Permit (if applicable according to the relevant legislation) - certified copy and English translation **stamped and signed by respective organization as true copy** of building Permit, Explanatory note, Bill of Quantities, Cover sheets of technical drawings and any other parts that the applicants thinks might contribute to better assessment.

In case of construction works, for which the relevant legislation does not require approval of a works design and issuing Construction Permit, the applicants have to present a letter issued by the relevant body clearly stating that approval of the works design and issuing Construction Permit are not required.

Detailed works design has to be submitted in all cases of construction activities (even in cases when the national legislation permits such kind of activities without the presence of works design). A compulsory part of the works design is an explanatory note revealing the current situation of the object for intervention and all work and supply stages necessary to reach the goal of the investment activities.

All construction activities should be supported by detailed bill of quantities. All items in the bill of quantities have to be specified in details and all unit prices and total price have to be pointed

Guidelines for Applicants

out. The bill of quantity can be incorporated in Budget line 6 of the Application Form if it contains all the attributes described above. If the bill of quantity is presented in local currency it has to contain a separate column showing all unit and total prizes in Euro and a note pointing out the exchange rate for the date the bill of quantity was prepared, together with sufficient evidence about the stated exchange rate.

If the national legislation provides the elaboration of detailed works design and/or approval of works design, respectively issuing Construction Permit, the subsequent submission of required documents (drawings, coordination documents, construction permits etc.) is unacceptable and it will be considered as improving the offer!

Please note that missing of approved works design (when applicable) is a reason for direct elimination without possibility for additional supplementations.

B7.6 Technical specification for supplies – the detailed specification should be clear enough for determination of the seeking deliverables.

Please note that trades and models must not be indicated!

B7.7 Latest photographs of the site. At the back of the photograph the following information has to be provided - **name of applicant, place, the exact location of the object on the photo, date.**

Any other documents/permissions/authorizations/etc. concerning the project should be provided as Annexes.

📌 IMPORTANT

Unless stated differently, all supporting documents must be presented in the form of copies, certified "True to the original" by the legal representative or an authorized person from the respective partner or by the Lead partner or an authorized person from the Lead Partner. No notary certifications are needed at the stage of application.

📌 IMPORTANT

Supporting documents must be supplied also in English translation stamped and signed by respective organization as true copy or at least the relevant parts of these documents, proving the partners' eligibility must be translated in English. The translated version will prevail for the purposes of evaluation of the application.

In case of changes in facts and circumstances concerning one or more of the partners in the period after submitting the project proposal, annexes A3, A4, A5, A6, A7 and Supporting documents B1 and B5 have to be presented to MA with respectively changed content and in the required form (English translation, certification and electronic copy). If the period of validity of Supporting document B4 Certificates for lack of obligations (taxes and social security duties) has expired at the date of contracting, a new valid document has to be supplied by the LP before signature of the subsidy contract.

In case the application is approved for funding, on the pre-contracting stage after request the Lead Partner has to present to the Managing authority the following documents:

- Copy of the partners' accounts - Annual Balance Sheet and Profit and Loss Accounts for 2009 and 2010 (*certified by the partner that is a true copy*);
- Copies of the partners' Certificate for registration or national registration code and VAT registration (if applicable) (*certified by the partner that is a true copy*).

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- Copies of the partners' certificate issued by the relevant body for lack of obligations (taxes and social security duties) issued not later than 6 months prior the date of application or plan for rescheduling of the debts if existing (**notary certified**).
- Declaration from all partners that they are familiar with the definition for irregularity and fraud according to a template.

3.3 Documents for information (C)

The following documents are provided for information only:

C. Subsidy contract - The contract annexed is only indicative.

IMPORTANT

The Assessment Working Group /Evaluation Committee can request additional documents or explanations, for clarification or justification of information/documents submitted in the project proposal.

4 Where and How to Send the Application

Each application form should be bound (together with its annexes) in the way that pages could not be taken away from the whole set. The project proposal should be submitted packed in archival cardboard box/es for the respective paper format. The cover page of the Application Form should be visible, where <Project Title>, <Name of the Lead Partner>, <Signature and Stamp of Lead Partner> should be written by the applicant. A full electronic version of the Application Form and its annexes must be also enclosed on a CD or DVD. The electronic format must contain **the same** proposal as the paper version enclosed.

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

Postal address, Address for hand delivery or by courier service

Bulgaria

6300 Haskovo

2 Patriarh Evtimiy Street

Floor 2, east wing,

offices: 88,89,90,91

Joint Technical Secretariat of the Bulgaria – Turkey CBC Programme

The outer envelope must bear the:

- **Call for Proposal number: 2007CB16IPO008 – 2011 – 2 and**
- **the full name and address of the applicant**































A copy of the cover page of the application form must also be attached to the front side of the envelope for identification. This should show: The Project Title: The name of the Lead Partner: The Priority Axis and the Measure”.








































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

Applications (application form and annexes) shall be submitted in **one original** and 1 copy , bound in A4 format.

Guidelines for Applicants

The complete application form must also be supplied in electronic format (CD or DVD). The electronic format must contain exactly the same proposal as the paper version enclosed. The documents issued by public authorities or other bodies should be scanned. The directories and files within the electronic carrier (CD or DVD) have to be structured according to the following predefined pattern and file formats of the appendixes (.doc, .pdf, .jpg, etc.) has to be as stated in the pattern:

CD or DVD	Directories, subdirectories and files	Explanations
	AF_ipacbcgtr_acronym.xls	The application form in Excel at the level of the main directory of the CD or DVD disk
	Annexes_A	
	Annexes_A1	
	Annex_A.1_Project Summary_en.doc	This should be an editable text document, not a scanned one.
	Annex_A.1_Project Summary_bg.doc	Editable text document
	Annex_A.1_Project Summary_tr.doc	Editable text document
	 Annex A2 Logframe	
	Annexes_A3	
	Annex_A.3_CV1_Manager.doc	According to the positions in Section 6.2. of the AF
	Annex_A.3_CV2_Coordinator.doc	
	Annex_A.3_CV3_Accountant.doc	
	Annex_A.3_CVn_..... .doc	
	Annex_A4	
	Annex_A.4_Partnership agreement.pdf	This should be a scanned document
	Annex_A5	
	Annex_A.5_Declaration of Eligibility.pdf	This should be a scanned document
	Annex_A6	
	Annex_A.6_PP1_Sworn Statement.pdf	This should be a scanned document
	Annex_A.6_PP2_Sworn Statement.pdf	This should be a scanned document
pdf	And so on for all partners
	Annexes_A7	
	Annex_A.7_PP1_Declaration of Commitment.pdf	This should be a scanned document
	Annex_A.7_PP2_Declaration of Commitment.pdf	This should be a scanned document
pdf	And so on for all partners
	Annexes_B1-6	
	Annex_B1	
	B1_PP1_en.pdf	The legal status of PP1 in English – scanned
	B1_PP1_bg/tr.pdf	The legal status of PP1 in original – in Bulgarian or Turkish language
	B1_PP2_en.pdf	The legal status of PP2 in English – scanned

 B1_PP2_bg/tr.pdf pdf  Annex_B2  B2_PP1_Balance2009_en.pdf  B2_PP1_Balance2010_en.pdf  B2_PP1_PLA2009_en.pdf  B2_PP1_PLA2010_en.pdf  B2_PP2_Balance2009_bg/tr.pdf  B2_PP2_Balance2010_bg/tr.pdf  B2_PP2_PLA2009_bg/tr.pdf  B2_PP2_PLA2010_bg/tr.pdf pdf  Annex_B3  B3_PP1_en.pdf  B3_PP1_bg/tr.pdf pdf  Annex_B4  B4_PP1_en.pdf  B4_PP1_bg/tr.pdf pdf  Annex_B5  B5_PP1_en.pdf  B5_PP1_bg/tr.pdf pdf  Annex_B6  B6_PP1_en.pdf  B6_PP1_bg/tr.pdf pdf  Annexes_B7  Annex_B7.1  B7.1_PP1_Ownership_en.pdf  B7.1_PP1_Ownership_bg/tr.pdf  B7.1_PP1_Agreement_en.pdf  B7.1_PP1_Agreement_bg/tr.pdf pdf  Annex_B7.2  B7.2_PP1_en.pdf  B7.2_PP1_bg/tr.pdf pdf	<p>The legal status of PP2 in original – in Bulgarian or Turkish language And so on for all partners</p> <p>The Balance Sheet of PP1 in English for 2009 The Balance Sheet of PP1 in English for 2010 The Profit and Loss Accounts of PP1 in English for 2009 The Profit and Loss Accounts of PP1 in English for 2010 The Balance Sheet of PP2 in original for 2009 The Balance Sheet of PP2 in original for 2010 The Profit and Loss Accounts of PP2 in original for 2009 The Profit and Loss Accounts of PP2 in original for 2010 And so on for all partners</p> <p>The National registration numbers of PP1 in English – scanned The National registration numbers of PP1 in original – scanned And so on for all partners</p> <p>The Certificate for lack of obligations of PP1 in English – scanned The Certificate for lack of obligations of PP1 in original – scanned And so on for all partners</p> <p>The Decision of Local Council/Board of Directors of PP1 in English – scanned The Decision of Local Council/Board of Directors of PP1 in original – scanned And so on for all partners</p> <p>The Legalized mandates of delegation of PP1 in English – scanned The Legalized mandates of delegation of PP1 in original – scanned And so on for all partners</p> <p>Only in case of investment activities</p> <p>The Ownership act or certificate for public ownership of PP1 in English – scanned Ownership act or certificate for public ownership of PP1 in original – scanned The Agreement with the owner of PP1 in English – scanned The Agreement with the owner of PP1 in original – scanned. And so on for all partners</p> <p>The Consent of the Owners concerning private territories of PP1 in English. The Consent of the Owners concerning private territories of PP1 in original And so on for all partners</p>
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<div data-bbox="320 152 375 203"></div> <div data-bbox="392 159 580 192">Annex_B7.3</div> <div data-bbox="392 203 430 255"></div> <div data-bbox="451 210 691 244">B7.3_PP1_en.pdf</div> <div data-bbox="392 255 430 306"></div> <div data-bbox="451 262 724 295">B7.3_PP1_bg/tr.pdf</div> <div data-bbox="392 360 430 412"></div> <div data-bbox="451 367 724 400">B7.3_PP1_bg/tr.pdf</div> <div data-bbox="392 465 430 517"></div> <div data-bbox="451 472 542 506">... .pdf</div> <div data-bbox="320 510 375 562"></div> <div data-bbox="392 517 580 551">Annex_B7.4</div> <div data-bbox="392 573 430 624"></div> <div data-bbox="451 580 691 613">B7.4_PP1_en.pdf</div> <div data-bbox="392 656 430 707"></div> <div data-bbox="451 663 724 696">B7.4_PP1_bg/tr.pdf</div> <div data-bbox="392 759 430 810"></div> <div data-bbox="451 766 542 799">... .pdf</div> <div data-bbox="320 804 375 855"></div> <div data-bbox="392 810 580 844">Annex_B7.5</div> <div data-bbox="392 855 430 907"></div> <div data-bbox="451 862 691 896">B7.5_PP1_en.pdf</div> <div data-bbox="392 907 430 958"></div> <div data-bbox="451 913 724 947">B7.5_PP1_bg/tr.pdf</div> <div data-bbox="392 958 430 1010"></div> <div data-bbox="451 965 542 999">... .pdf</div> <div data-bbox="392 1010 430 1061"></div> <div data-bbox="451 1016 691 1050">B7.5_PP1_en.doc</div> <div data-bbox="392 1061 430 1113"></div> <div data-bbox="451 1068 724 1102">B7.5_PP1_bg/tr.doc</div> <div data-bbox="392 1113 430 1164"></div> <div data-bbox="451 1120 542 1153">... .doc</div> <div data-bbox="392 1176 430 1227"></div> <div data-bbox="451 1182 683 1216">B7.5_PP1_en.xls</div> <div data-bbox="392 1281 430 1332"></div> <div data-bbox="451 1288 718 1321">B7.5_PP1_bg/tr.xls</div> <div data-bbox="392 1355 430 1406"></div> <div data-bbox="451 1361 536 1395">... .xls</div> <div data-bbox="320 1400 375 1451"></div> <div data-bbox="392 1406 580 1440">Annex_B7.6</div> <div data-bbox="392 1451 430 1503"></div> <div data-bbox="451 1458 691 1491">B7.6_PP1_en.pdf</div> <div data-bbox="392 1503 430 1554"></div> <div data-bbox="451 1509 724 1543">B7.6_PP1_bg/tr.pdf</div> <div data-bbox="392 1554 430 1606"></div> <div data-bbox="451 1561 542 1594">... .pdf</div> <div data-bbox="320 1599 375 1650"></div> <div data-bbox="392 1606 580 1639">Annex_B7.7</div> <div data-bbox="392 1650 430 1702"></div> <div data-bbox="451 1657 836 1691">B7.7.1_PP1_explanation.jpg</div> <div data-bbox="392 1702 430 1753"></div> <div data-bbox="451 1709 836 1742">B7.7.2_PP1_explanation.jpg</div> <div data-bbox="392 1753 430 1805"></div> <div data-bbox="451 1760 536 1794">... .jpg</div>	<p>Permission for construction in special territories of PP1 in English – scanned</p> <p>Permission for construction in special territories of PP1 in original</p> <p>In case of investment activities concerning renovation of cultural monuments: relevant documentation required by the respective national legislation in English and in original – scanned</p> <p>And so on for all partners</p> <p>Positive Environment Impact Assessment or letter that it is not necessary of PP1 in English</p> <p>Positive Environment Impact Assessment or letter that it is not necessary of PP1 in original.</p> <p>And so on for all partners</p> <p>Approved detailed works design of PP1 in English</p> <p>Approved detailed works design of PP1 in original.</p> <p>And so on for all partners</p> <p>Explanatory note from the Approved detailed works design of PP1 in English</p> <p>Explanatory note from the Approved detailed works design of PP1 in original.</p> <p>And so on for all partners</p> <p>Estimated Bill of Quantities from the Approved detailed works design and/or Estimated Bill of Quantities for the supplies of PP1 in English</p> <p>Estimated Bill of Quantities from the Approved detailed works design and/or Estimated Bill of Quantities for the supplies of PP1 in original.</p> <p>And so on for all partners</p> <p>Detailed technical specification for supplies of PP1 in English</p> <p>Detailed technical specification for supplies of PP1 in original.</p> <p>And so on for all partners</p> <p>Replace “explanation” with the name or a description of the construction site</p> <p>Replace “explanation” with the name or a description of the construction site</p> <p>And so on for all partners</p>
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Please note that the documents have to be scanned by conventional scanning machine and not photographed by camera, mobile phone or other picture taking device. Annexes and Supporting documents have to be provided in separate files, as described above. They should not be provided all in one file. If some of the scanned files becomes too large and difficult to handle by regular computers it is acceptable the same file to be divided into several files clearly noting

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which part of the respective annex they contain, e.g. B7.6_PP1_en.pdf can be separated in two parts as follows: B7.6_PP1_en-part1.pdf and B7.6_PP1_en-part2.pdf.

5 Deadline for Receipt of Applications

📌 IMPORTANT

The deadline for the receipt of applications is December 8, 2011, 5 30 pm.

Any application registered after the deadline will automatically be rejected, even if the postmark indicates a date preceding the deadline or if the delay is due to the courier service.

6 Evaluation and Selection of Applications

The project evaluation and selection criteria prepared by the Managing Authority together with the National Authority and the Joint Technical Secretariat are approved by the Joint Monitoring Committee(JMC).

The JMC will decide on the approval of projects and the amount of programme's financial contribution to each operation. Following that, each Lead partner/beneficiary will be informed with an official letter, signed by the MA on behalf of JMC, about approval/rejection of their project. For the approved projects this letter will also provide information on the next steps. Detailed rules on decision making will be included in the rules of procedure of the Joint Monitoring Committee.

Contracts with the lead beneficiaries of the approved projects will be prepared on the standard template. Implementation of the projects may start only after the contracts are signed by both - the MA and the lead beneficiary.

6.1 STEP 1: OPENING SESSION AND ADMINISTRATIVE CHECK

The following will be assessed:

- The deadline has been respected. If the deadline has not been respected the proposal will automatically be rejected.
- The project proposal satisfies all the criteria mentioned in the Table for administrative compliant check. If any of the requested information is missing or is incorrect, the proposal may be rejected on that sole basis and the proposal will not be evaluated further.

📌 **IMPORTANT** Additional clarification concerning administrative and eligibility compliance of the project proposals could be requested. The Assessment Working Group may request submission of certified translation in English of any Supporting Document in case the presented translation is considered as not convincing. Please have in mind that additional information/clarification must not be requested when improvement of proposal is possible.

ADMINISTRATIVE COMPLIANCE CHECK

ADMINISTRATIVE PART (to be filled by JTS)

Registration No	
Project No	
Lead Partner	
Partner/s	

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Project title	
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No	CRITERIA FOR ADMINISTRATIVE COMPLIANCE	YES	NO	COMENTS
1.	The Project proposal has been delivered within the deadline			
2.	The identification details are clearly stated on the outside of the sealed package			
3.	The Lead partner has not submitted any other project proposal (as a Lead partner) under this call for proposals. All project partners (including the Lead partner) do not participate in more than 5 (five) projects (including the current one) under this call for proposals.			
4.	All parts of the Application Form and supporting documents are submitted in one original and one copy			
5.	An electronic version of the Application Form has been provided according to the spreadsheet template within the Application package Electronic versions of Annexes and Supporting documents have been provided, they are readable and in the required file formats.			
6.	Project summary is submitted in 3 (three) languages English, Bulgarian and Turkish and it contains all the attributes given in the template. The project summary in the Application form has the same activities as the one described in the other parts of the Application form. The date version of the summary in the application form matches with the date version of the Partnership and co-financing statement.			
7.	The Application Form is duly completed in compliance with the template. All sheets of the Application Form have the same date versions. The electronic version is fully identical to the paper version, the CD/DVD is organized according to the guidelines and all documents are readable			
8.	All sections of the Application Form are typed in English			
9.	Logframe is presented in English (Annex A2)			
10.	CVs of the project team are presented in English and they contain all the attributes given in the template (Annex 3) The number of the presented CVs are equal to the number of the staff pointed out in the Application Form.			
11.	Partnership agreement of all partners is presented (Annex 4)			
12.	Declaration of eligibility signed by Lead partner is presented (Annex 5)			
13.	Sworn statement signed by Lead partner and all partners is presented (Annex 6)			
14.	Partnership and co-financing statement signed and stamped by every partner			
15.	Declaration of Commitment signed and stamped by every partner (Annex 7)			
16.	Only for investment projects - The minimum rate in Budget line 6 for investment projects is observed			
No	SUPPORTING DOCUMENTS	YES	NO	
17.	Documentary and other evidence (in original or certified copy) on the most recent legal status of all partners is provided (issued not later than 6 months prior the date of application) it contains all the attributes described in section 3.2 of the Guidelines for Applicants. In case of Subsidiary structure(s) of local/regional/national authorities			

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	situated in the eligible area acting as partner(s)– the respective act with assignment of the functioning of the unit in the definite territory is attached.			
18.	Copy of the partners' accounts - Annual Balance Sheet and Profit and Loss Accounts for 2009 and 2010 /if completed/ (<i>certified by the partner that is a true copy</i>).			
19.	Copies of the partners' BULSTAT registration/Tax number and certificate for VAT registration/ lack of VAT registration (<i>certified by the partner that is a true copy</i>).			
20.	Copies of the partners' certificate issued by the relevant body (National Income Agency/BG/, Tax office and Social Security Office /TR/) for lack of obligations (taxes and social security duties) issued not later than 6 months prior the date of submission of application or plan for rescheduling of the debts if existing (<i>in original or certified by the partner that is a true copy</i>). Note: a certificate indicating presence of obligations that have not an approved plan for rescheduling is a reason for elimination. Unfinished procedure for rescheduling of obligations is not considered as approved rescheduling.			
21.	Decision of the managing authority: Local Council (Municipal Council)/Board of Directors / any similar body or managing person regarding the project development and implementation is provided.			
22.	Legalized mandates of delegation from the legal representatives of partners (in case the application form and annexed declarations are not signed by the legal representatives of the Lead Partner/partners) – original and English translation is/are presented			
No	SUPPORTING DOCUMENTS CONCERNING INVESTMENT ACTIVITIES	YES	NO	
23.	In case investment activities will be performed on public property			
23.1.	Ownership act or certificate for public ownership of the tangible assets, which will be subject of works activities (<i>certified by the partner that is a true copy</i>), together with recent outline/design of the property (<i>certified by the partner that is a true copy</i>)			
23.2.	Consent of the owner clearly stating that the assets are given for free right of use for the purpose of the project at least for 5 years after end of the project. (<i>certified by the partner that is a true copy</i>)			
24.	In case of investment activities required passing through private territories the consent of the owners must be obtained and presented in a due legal form and copy of the ownership act (<i>certified by the partner that is a true copy</i>)			
25.	In case of investment activities within territories/objects with special status (National parks, environmental and architectural reserves, cultural monuments, protected areas, areas included in Nature 2000 etc.) relevant documentation (permits, approvals, certificates, statements, etc.) required by the respective national applicable law is/are presented			
26.	Copy of letter issued by the relevant body clearly stating that Environmental Impact Assessment is not necessary (<i>in original or certified by the partner that is a true copy</i>) or Copy of positive Environmental Impact Assessment (positive opinion from the relevant body), required by the national legislation (<i>in original or certified by the partner that is a true copy</i>)			

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27.	Approved detailed works design and issued construction Permit (if applicable according to the relevant legislation). Explanatory note as a part of the works design is presented. Bill of quantities and prizes for the works and supplies are presented and they contain all the attributes required in the Guidelines for applicants			
28.	Detailed technical specifications (for supplies) with unit and total prizes presented			
29.	Latest photographs of the site, envisaged for intervention			
COMMENTS		YES	NO	
Project proposal satisfies all criteria for administrative compliance				
Assessor's name:		Assessor's signature:		Date of evaluation:

Please note that the electronic application form prints automatically the current date and time at the footer of each page, which is called "version" of the project. This version cannot be changed by regular means and modifying it will be considered as modification of the Application Form.

The printed project proposal, generated by the Excel AF must have equal dates at all pages.

📌 IMPORTANT

Only proposals that satisfy all the criteria mentioned in the administrative compliance checklist will be evaluated on technical and quality eligibility stage.

6.2 STEP 2: ELIGIBILITY CHECK

The eligibility check is a part of evaluation of the project proposal, based on the criteria for eligibility as follows:

Partners are eligible when:

- All partners are eligible according to the eligibility criteria laid down within Section of Applicant's Guide 2.2. Eligibility Criteria.
- All partners are one of the listed organizations for each axis/intervention.

Project proposal are eligible when:

- Project proposal covers at least one of the following conditions: Joint development, Joint implementation, Joint staffing, Joint financing

ELIGIBILITY COMPLIANCE CHECK

ADMINISTRATIVE PART (to be filled by MA)

Registration No	
Project No	
Lead Partner	
Partner/s	
Project title	

No	ELIGIBILITY CRITERIA	YES	NO	COMMENTS
1.	All partners are registered in the cross border region. In case of Subsidiary structure(s) of local/regional/national authorities situated in the eligible area acting as partner(s), which is not a legal entity, the respective act with assignment of its functioning shows that its territorial scope is within the cross			

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	border region.			
2.	At least one partner from each side of the cross border region is involved			
3.	Lead partner is registered in the eligible border region at least 12 months before the deadline for submission of project proposals under current Call for Proposals			
4.	All partners meet eligible criteria defined in the Guidelines Section 2.2.1			
5.	The implementation period does not exceed the maximum project duration per area of intervention and it is in compliance with the minimum duration, indicated in the Applicant's Guide			
6.	The amount of the eligible expenditures requested is in line with the limits indicated in the Applicant's Guide			
7.	The co-financing rates for EU and national funds are within the limits indicated in the Applicant's Guide			
8.	At least one of the following conditions is covered: Joint development, Joint implementation, Joint staffing, Joint financing			
9.	The project proposal covers only one Key Area of Intervention			
COMMENTS		YES	NO	
Project proposal satisfies all criteria for eligibility compliance				
Assessor's name:		Assessor's signature:		Date of evaluation:

📌 IMPORTANT Only proposals that satisfy all the criteria mentioned in the eligibility compliance checklist will be evaluated on technical and quality evaluation stage.

6.3 STEP 3: TECHNICAL AND QUALITY EVALUATION STAGE

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

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

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

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

Scoring:

The evaluation criteria are divided into sections and subsections. Each subsection will be given a score between 1 and 10.

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Note on Section 1. Management capacity

If the total average score is less than 10 points for section 1, the project proposal will not be proposed for financing.

Note on Section 2. Consistency with the programme and other documents and strategies

If the total average score is less than 15 points for section 2, the project proposal will not be proposed for financing.

TECHNICAL AND QUALITY EVALUATION

TECHNICAL AND QUALITY EVALUATION PART (to be filled by MA)				
Registration No				
Project No				
Lead Partner				
Partner/s				
Project title				
MANAGEMENT CAPACITY				
No	SELECTION CRITERIA		Max. score	Reference Comments
1.	The partners are experienced in project management in similar or other EU financed projects		5	Part I p.1.3.
	<i>All partners implemented 3 or more projects</i>	<i>5 points</i>		
	<i>All partners implemented at least 1 - 2 project</i>	<i>4 points</i>		
	<i>All partners implemented at least 1 project</i>	<i>2-3 points</i>		
	<i>One of the partners has experience</i>	<i>1 point</i>		
2.	The project team proposed has the capacity to manage the project		5	Part II p.6.1., p.6.2. & CVs of the proposed project team
	<i>All members of the project team have experience in project management and experience for the positions they will occupy.</i>	<i>5 points</i>		
	<i>Most (more than a half) members of the project team have experience in project management and experience for the positions they will occupy</i>	<i>3 points</i>		
	<i>Some (less than a half) members of the project team have experience in project management and experience for the positions they will occupy</i>	<i>2 points</i>		
	<i>One member of the project team has experience in project management and experience for the position he will occupy</i>	<i>1 point</i>		
3.	Participation of partners in project management team		5	Part II p.6.1. & p.6.2.
	<i>Even participation of all partners and the two countries (Bulgaria and Turkey) in the team</i>	<i>5 points</i>		
	<i>Balanced participation of all partners and the two countries in the team (in case no partner/country exceeds the involvement of another partner/country by more than 50 %)</i>	<i>4 points</i>		
	<i>Unbalanced participation, but all partners participate</i>	<i>3 points</i>		
	<i>In case of several partners - no participation of some of them</i>	<i>1-2 points</i>		

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	<i>In case only one partner/country participates</i>	<i>1 point</i>		
4.	Staff, technical capacity and financial stability of the project partners		5	Part I p.2.2.
	<i>All partners have permanent staff, good technical capacity and financial stability</i>	<i>5 points</i>		
	<i>Some partners have permanent staff, good technical capacity and financial stability</i>	<i>2-4 points</i>		
	<i>Newly established organizations/ no stability of all partners</i>	<i>1 point</i>		
	SUBTOTAL		20	
CONSISTENCY WITH THE PROGRAMME AND OTHER DOCUMENTS AND STRATEGIES				
No	SELECTION CRITERIA		Max. score	Reference/ comments
5.	The project is relevant to the overall and respective specific objectives of the programme and to the objectives of one of the priority axes and one of the spheres of intervention and respective indicators		5	Part II p.3.1., p.3.2.
	<i>Clear relevance</i>	<i>5 points</i>		
	<i>Partial relevance</i>	<i>2-4 points</i>		
	<i>Weak relevance</i>	<i>1 point</i>		
6.	Clearly defined and strategically chosen are the target groups		5	Part II p.3.4.
	<i>Clearly defined and quantified target groups</i>	<i>5 points</i>		
	<i>Vague description of target groups</i>	<i>2-4 points</i>		
	<i>Undefined target groups</i>	<i>1 point</i>		
7.	The project is relevant to the particular needs and constraints of the border region		5	Part II p.1.4. 3.1, 3.2
	<i>The envisaged activities in terms of needs of the border region are very well described and well justified: they are timely and appropriate</i>	<i>5 points</i>		
	<i>The envisaged activities in terms of needs of the border region are described and partially justified</i>	<i>3 points</i>		
	<i>Insufficiently described and not well justified activities in terms of needs of the border region</i>	<i>1 points</i>		
8.	Coherence of the project with other programmes and/or strategies		5	Part II p.5.1. & p.5.2.
	<i>Clearly demonstrated coherence</i>	<i>5 points</i>		
	<i>Unclear or vague coherence</i>	<i>2-4 points</i>		
	<i>Weak coherence demonstrated</i>	<i>1 point</i>		
9.	The project is value added, providing coherence with the following horizontal themes: equal opportunities, sustainable development and climate change		5	Part II p.5.3. Passing
	<i>Envisaged activities, the target groups, and the goals of the project are coherent with 3 of the above horizontal themes</i>	<i>5 points</i>		
	<i>Envisaged activities, the target groups, and the goals of the project cover 2 of the above horizontal themes</i>	<i>3 points</i>		

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	Coherence with 1 of the above horizontal themes	2 points		
	Weak value added	1 point		
	SUBTOTAL		25	
METHODOLOGY				
No	SELECTION CRITERIA	Max. score	References	
10.	The proposed project activities are appropriate and the logic consistency objective-activity-result (project indicators) is kept	5	Part II p.3.3 & p.3.5.	
	Full consistency between objective, activities & results. Proposed activities correspond directly to the needs	5 points		
	Well described consistency between objective, activities & results, but some details are missing.	4 points		
	Not very well described consistency between objective, activities & results.	3 points		
	Activities too theoretical and hard to estimate the achievement of project results	2 points		
	Weak consistency between activities and project results	1 point		
11.	Project activities (including activities for information and publicity) are realistic, well defined and justified by the supporting documents (in case of works and supplies)	5	Part II p.3.5 Passing	
	Excellent defined, justified and realistic activities	5 points		
	Well defined and justified activities, but not very realistic	4 points		
	Good definition and justification of activities, not very realistic	3 points		
	Insufficient definition and justification of activities	2 points		
	Poor description of activities, weak justification and not realistic activities.	1 point		
12.	Cross-border impact of the project	5	Part II p.1.3. Passing	
	Strong cross-border impact	5 points		
	Sufficient cross-border impact	3 points		
	Weak cross-border impact	1 point		
13.	Action plan and partners' responsibilities	5	Part II p.3.6.	
	Clear and feasible action plan and partners' responsibilities	5 points		
	Some activities not well justified/some responsibilities unclear	2-4 points		
	Unclear action plan and partners' responsibilities	1 point		
14.	Level of involvement and participation of project partners in activities	5	Part II p.3.5.	
	Even involvement of all partners and the two countries in project activities and responsibilities.	5 points		
	Balanced participation of all partners (in case no partner/country exceeds the involvement of another partner/country by more than 50 %)	4 points		

Guidelines for Applicants

	<i>Unbalanced distribution of activities between project partners, but all partners are involved</i>	<i>2-3 points</i>		
	<i>One partner/country is not involved in project activities and responsibilities</i>	<i>1 point</i>		
15.	Output and result indicators		5	Part II p.4.1. & p.4.2.
	<i>Well quantified and achievable indicators, relevant to the project activities</i>	<i>5 points</i>		
	<i>Quantified and relevant to the project activities but not realistically achievable.</i>	<i>4 points</i>		
	<i>Quantified indicators but some of the them are not specified and relevant to the project activities.</i>	<i>3 points</i>		
	<i>Most of the indicators are not: clearly specified/ objectively verifiable/ quantified</i>	<i>2 points</i>		
	<i>Irrelevant indicators are provided</i>	<i>1 point</i>		
16.	Potential multiplier effects of the project and sustainability of expected results after EU funding ends		5	Part II p.4.3. & p.4.4.
	<i>The applicant has clearly and logically described the multiplier effect and has analyzed well the different aspects of sustainability. The project benefits are realistic and will continue to exist after project completion. The financial sustainability is justified</i>	<i>5 points</i>		
	<i>Doubtful multiplier effect and sustainability</i>	<i>2-4 points</i>		
	<i>No possible multiplier effect or sustainability</i>	<i>1 point</i>		
	SUBTOTAL		35	
BUDGET				
No	SELECTION CRITERIA		Max. score	Reference/ comments
17.	Estimated expenditures are necessary for the implementation of the project and the prices are realistic and market based.		10	Part III Passing
	<i>Planned expenses fully correspond with proposed activities. Expected results are comparable to envisaged costs. Applicant has chosen the optimal solution for cost effectiveness. All estimated costs are necessary for the implementation of the project. All prices are realistic and market based. No budget reduction/revisions are needed</i>	<i>10 points</i>		
	<i>Planned expenses correspond with proposed activities. Expected results are comparable to envisaged costs, but partial reductions (up to 10 % of the total project budget) of budget items and/or item prices will optimize cost effectiveness.</i>	<i>6-8 points</i>		
	<i>Planned expenses correspond with proposed activities. Expected results are comparable to envisaged costs. Serious reduction of budget items and/or item prices (from 10 to 25 % of the total project budget) is necessary for optimizing the expenditure performance.</i>	<i>4-5 points</i>		
	<i>It is obvious, that project expenses highly exceed the expected benefits for the target area and the target</i>	<i>1-3 points</i>		

Guidelines for Applicants

	groups. Some costs are not relevant to the activities proposed. A great reduction of budget items and/or item prices (more than 25 % of the total project budget) is necessary			
	Most estimated costs are not necessary for the implementation of the project. Costs envisaged are totally inconsistent with project activities. <i>Most</i> prices are not realistic and not market based. <i>Budget needs full re-design in this aspect.</i>	0 point		
18.	Budget lines' maximum and minimum rates and breakdown between Budget lines	5	Part III Table 2	
	All Budget lines' maximum and minimum rates are taken into consideration. Applicant has chosen the optimal (for the project type) solution for distribution of expenses between ALL budget lines including sufficient budget for information and publicity.	5 points		
	Some Budget lines' maximum and/or minimum rates are not taken into consideration. Some Budget lines' expenses were over/under-estimated and/or some budget lines were unduly neglected.	2-4 points		
	Budget lines' <i>maximum</i> and <i>minimum rates</i> are not taken into consideration, no budget foreseen for information and publicity. <i>Budget needs full re-design in this aspect.</i>	1 point		
19.	Budget breakdown between partners and countries	5	Part III Table 4	
	<i>Even (but not equal because some costs are relevant just to the LP) budget breakdown between partners AND countries.</i>	5 points		
	<i>Balanced budget breakdown between partners and countries (in case partner's/country's budget exceeds the budget of another partner/country from 25 to 75 %)</i>	4 points		
	<i>Unbalanced budget breakdown between partners and countries (in case partner's/country's budget exceeds the budget of another partner/country from 75 to 150 %)</i>	2-3 points		
	<i>Unfair budget breakdown between partners and countries (in case partner's/country's budget exceeds the budget of another partner/country more than 150 %)</i>	1 point		
	SUBTOTAL	20		
	TOTAL	100		
COMMENTS				
Recommendation				
Assessor's name:		Assessor's signature:		Date of evaluation:

IMPORTANT

Maximum score of the technical evaluation is 100 points. Only projects with score of 65 and above at the technical and quality evaluation stage will be proposed for financing.

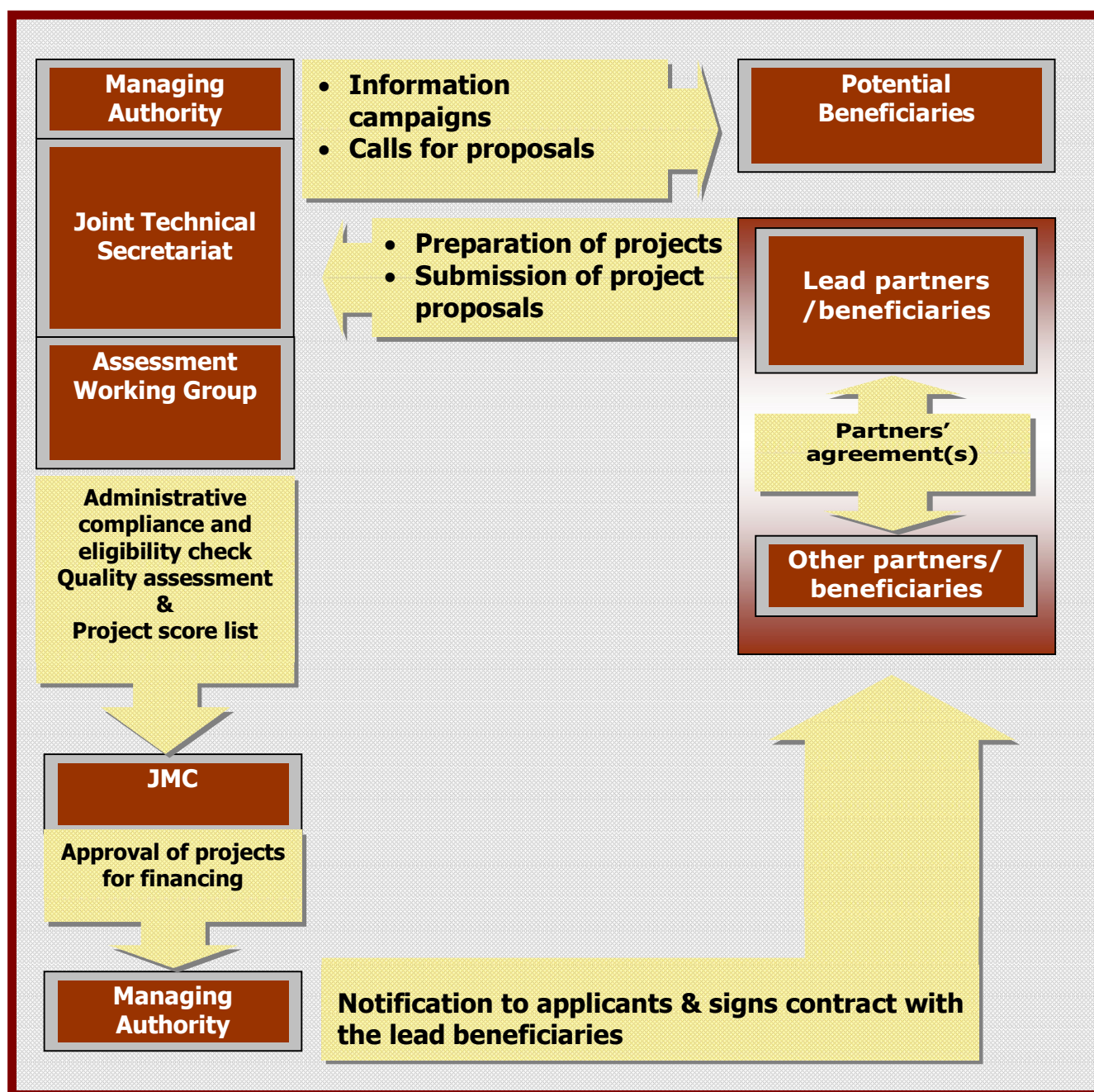
Guidelines for Applicants

Taking into account good administrative practice, the Assessment Working Group can verify and subsequently exclude an applicant at any stage of the Call for proposals evaluation process whenever it is obvious that the latter does not meet the eligibility criteria.

Provisional selection

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

Scheme of Project Evaluation and Selection Procedure



7 Contracting

The Lead Partner of an approved operation shall sign an IPA **Grant Contract** for the total IPA funds with the Managing Authority.

Before signing the contract, the Managing Authority will have the right to carry out negotiations for budget revision (if necessary).

Before signing this contract, the Managing Authority will up-date the contract details and set in the annexes the specific and explicit binding elements to be respected by the final beneficiary.

After signing the IPA Grant Contract, the Lead Partner is responsible for implementing the EU co-financed operation.

Draft **Grant contract** is presented in **Annex C to these Guidelines for applicants**

Glossary of terms

Applicant	Any legal entity meeting the eligible criteria which submits an application to be financed by the programme
Beneficiary	Any applicant whose application has been approved for financing
Eligible expenditure	Expenditures made by a Beneficiary, related to the operations financed through the programme, which could be financed from the structural instruments, as well as from the state budget and/or own Beneficiary contribution
Eligible area/region	The border area of Bulgaria comprises the districts of Haskovo, Yambol and Bourgas. The border area of Turkey comprises the provinces Edirne and Kırklareli.
Lead Partner	An applicant designated by the partners involved in a project responsible for coordinating the process of development, submission and implementation of that specific project
Managing Authority	The structure responsible for managing the operational programme is DG "Territorial Cooperation management", within Ministry of Regional Development and Public Works in Bulgaria.
National Authority	The counterpart of the Managing Authority in the partner state Republic of Turkey Ministry for EU Affairs
Priority Axis	A strategic priority within the operational programme, including a group of interconnected key areas of intervention and operations with measurable specific objectives
Partner	Any applicant involved in a project
Project	The operation for which funding is being sought under the Programme, expressed in the application form and its annexes.

Glossary of Acronyms

AA	Audit Authority
AF	Application Form
BG	Republic of Bulgaria
CA	Certifying Authority
CARDS	Community assistance for Reconstruction, Development and Stabilisation
CBC	Cross-Border Cooperation
CBA	Cost Benefit Analysis
EC	European Commission
ERDF	European Regional Development Fund
EU	European Union
DG	Directorate General
GD	Government Decision
ICT	Information and Communication Technology
IPA	Instrument for pre accession
IT	Information Technology
JMC	Joint Monitoring Committee
JTS	Joint Technical Secretariat
MA	Managing Authority
MF	Ministry of Finance (Republic of Bulgaria)
MIS	Management Information System
MoU	Memorandum of Understanding
MS	Member State
NA	National Authority
NGO	Non Governmental Organization
NUTS	Nomenclature of Territorial Units for Statistics
OP	Operational Programme
OPRD	Operational Programme Regional Development
PC	Personal Computer
PR	Public Relations
Phare CBC	Phare (Poland Hungary Aid for Reconstruction of the Economy)

Guidelines for Applicants

	Programme for Cross-Border Cooperation
PRAG	Practical Guide for Contract Procedures financed from the general budget of the European Communities in the context of external actions
RDA	Regional Development Agency
R&D	Research and Development
SEA	Strategic Environmental Assessment
SMEs	Small and Medium sized Enterprises
SOP	Sectoral Operational Programme
SWOT	Strengths, Weakness, Opportunities, Threats
TA	Technical Assistance
VAT	Value Added Tax
WFD	Water Framework Directive