



Eurostars II - bando 2015

Giugno 2015

Nota di Aggiornamento



Aim Higher

EUROSTARS

Funding excellence
in innovation

Eligibility guidelines
for applications



September 2014
Version 1.2





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This document provides applicants with an explanation of the eligibility criteria imposed on projects by Eurostars and the method of calculation.

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Why are there eligibility criteria?

Eurostars supports R&D-performing SMEs and their partners by funding collaborative innovation projects that will be rapidly commercialised. It encourages and assists the development of new products, processes and services by offering support and funding to help innovations to access regional, national and international markets. The eligibility criteria are in place to ensure that the applications respect this ambition.

How are the criteria assessed?

Eurostars applications must meet all eligibility criteria otherwise they will not be put forward for evaluation and will be excluded. Compliance with the criteria is assessed both electronically and manually. If a criterion cannot be definitely answered, ineligibility will be conferred.

A description of the assessment method for each criterion is provided later in this document.

If my situation changes, will it affect my eligibility?

Potentially. The application must comply with all eligibility criteria from the moment of submission until the signing of the final consortium agreement approximately 7 months later.

- Applicants are obliged to inform Eurostars of any new information which may affect eligibility.
- Eurostars is obliged to review the eligibility of applications should new information be presented or discovered.

It is possible that an application originally declared eligible is later removed from the evaluations.

Will I be informed about the result?

Yes. Applications which are deemed to be eligible will receive confirmation that they have passed the eligibility check and are under evaluation. Applications which have failed the eligibility check will be informed of their ineligibility. Only the first criterion to cause ineligibility will be identified.

My project is ineligible. Is the result final?

Yes. It is not possible to appeal against the result.

Some general definitions

FTE – Full Time Equivalent

FTE is a measure of worker involvement. One person working full-time is equal to 1.0 FTE. One person working for 50% of the time is equal to 0.5 FTE. EU documentation refers to Annual Work Units or AWU. AWU and FTE are equal and interchangeable.

SME

“SME” stands for small and medium-sized enterprises – as defined in EU law: EU recommendation 2003/361. The main factors determining whether a company is an SME are:

- 1/ Economic activity
- 2/ number of employees and
- 3/ either turnover or balance sheet total.

To qualify as an SME, an organisation must conform to the EC definition of an SME.
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R&D-performing SME

To qualify as an R&D-performing SME an organisation must first comply with the EC definition of an SME. In addition, it must also meet the thresholds for dedicated R&D FTEs or turnover set by EUREKA.

SMEs with a headcount of 100 FTE employees or fewer must:
 have at least 5.0 FTEs dedicated to R&D activities
 or dedicate at least 10.00% of their FTE to R&D activities
 or dedicate at least 10.00% of their turnover to R&D activities

SMEs with a headcount of more than 100 FTE employees must:
 have at least 10.0 FTEs dedicated to R&D activities
 or dedicate at least 10.00% of their FTE to R&D activities
 or dedicate at least 10.00% of their turnover to R&D activities.

SME Headcount (where X is the number of FTE)	Minimum number of FTEs dedicated to R&D	or	Minimum % of FTEs dedicated to R&D	or	Minimum % of Turnover dedicated to R&D
	whichever is fewer				
$0 < X \leq 100$	5.0	or	10.00 %	or	10.00 %
$100 < X < 250$	10.0	or	10.00 %	or	10.00 %

Eurostars countries

The Eurostars countries are listed on the website:

<http://www.eurostars-eureka.eu/applicationInformation>

Organisations which are legal entities in any other country may participate (as a third country) subject to the fulfilment of all eligibility criteria listed within this document, with particular attention being given to E2, E4, E5 and E11.

What are the Eligibility criteria?

E1: The project leader is an R&D-performing SME

To be eligible, the organisation undertaking the role of project leader must comply with the requirements for being an R&D-performing SME.

E2: The project leader is from a Eurostars Country; i.e. a Eurostars Participating state or a Eurostars Partner country

To be eligible, the organisation undertaking the role of project leader must be legally and operationally based in a Eurostars country (i.e. a Eurostars Participating state or a Eurostars Partner country).

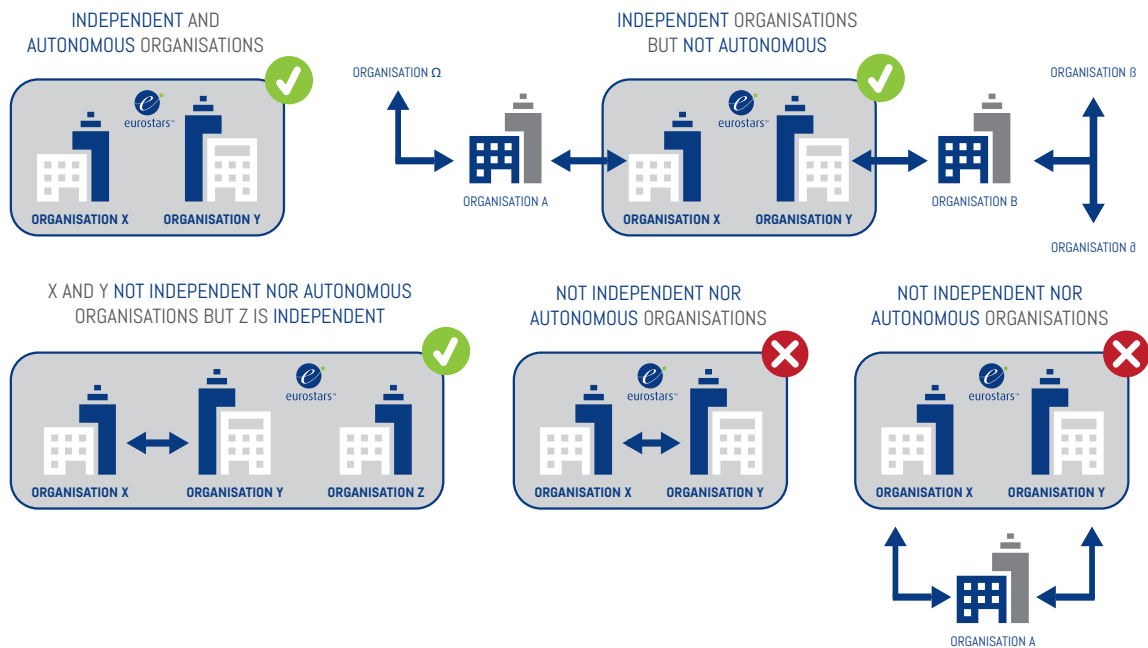
Eurostars Participating state: Austria, Belgium, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Turkey and the United Kingdom.

Eurostars Partner country: Switzerland and South Korea

E3: The project contains at least two legal entities that are independent of one another

To be eligible, the partnership must include at least two legal entities independent of each other, meaning that neither is under the direct or indirect control of the other or under the same direct or indirect control as the other.

Specifically for this criteria:



E4: The consortium is a partnership hosted by at least two different Eurostars countries; i.e. a Eurostars Participating state or a Eurostars Partner country.

To be eligible, the partnership must include participation from at least two different Eurostars countries (i.e. a Eurostars Participating state or a Eurostars Partner country).

Consideration:

Organisations which are not full participants within the project (e.g. subcontractors) are not considered.

E5: The budget (excluding subcontracting) of the R&D-performing SME(s) located in Eurostars Participating state(s) or Partner Country(ies) is equal to at least 50.00% of the total project budget.

To be eligible, the participant budget (minus subcontracting costs) of the sole R&D-performing SME involved in the application must be equal to at least 50.00 % of the total project budget. If there are multiple R&D-performing SMEs, their combined total participant budget (minus subcontracting costs) must equal at least 50.00 % of the total project budget.

In either case, the 50.00% budget threshold must be met by R&D-performing SME(s) located in Eurostars Participating state(s) or Partner Country(ies).

Calculation:

% R&D-performing SME contribution is calculated as:

$$\frac{\sum \text{participant budget}_{R\&D \text{ performing SME}} - \sum \text{Subcontracting cost}_{R\&D \text{ performing SME}}}{\text{Total project budget}} \times 100$$

Where the R&D-performing SME(s) is/are in Eurostars Participating state(s) or Partner Country(ies).

Consideration:

Subcontracting by the R&D-performing SMEs is allowed but it is reiterated that the calculation subtracts the accumulated cost of the subcontracting by the R&D-performing SME(s) from the combined budget of the R&D-performing SMEs. The accumulated subcontracting cost is not subtracted from the total project budget.

E6: No single entity is responsible for more than 75.00 % of the project budget.

To be eligible, the project must be spread across different international partners. No single entity may be responsible for more than 75.00 % of the total project budget.

Calculation:

The individual budget of each participant is calculated (inclusive of any subcontracting costs) and is divided by the total budget of the project.

Where the participating organisations are not independent from one another, the sum of their individual participant budgets (inclusive of any subcontracting costs) is divided by the total budget of the project.



E7: The participant(s) from a given country may not be responsible for more than 75.00 % of the total project budget.

To be eligible, the participant(s) from a given country may not be responsible for more than 75.00 % of the total project budget.

Calculation:

The budget of the organisations from each of the represented countries is calculated. The sum of the individual participant budgets for each country (inclusive of any subcontracting costs) is divided by the total budget of the project.

E8: The project duration is 36.0 months or fewer.

To be eligible, the project must be completed in 36.0 months or fewer.

E9: Market introduction is within 24.0 months of the project's completion.

To be eligible, the market introduction of the major project result (the main product/process/service proposed in the application) is planned to occur within 24.0 months of the completion of the project.

In the case of biotechnology, biomedical or medical projects, the start of clinical trials is planned to occur within 24.0 months of project completion.

Calculation:

The time difference between the planned end of the project and planned market entry of the main product/process/service (as mentioned within the application) is calculated.

Consideration:

This will also form part of the evaluation, with the quoted figure in the application being evaluated with respect to its feasibility.

E10: The project meets the EUREKA criteria and must have a civilian purpose.

To be eligible, the project can address any technology area, but must have a civilian purpose and be aimed at the development of a new product, process or service.

E11: Each of the participating organisations in the consortium is a legal entity in the host country.

To be eligible, each participant must be a legal entity, as defined by the legislation of the country where it is hosted. Being a legal entity elsewhere within the EU or in another Eurostars country is not sufficient. Ineligibility of a single participant will lead to the ineligibility and rejection of the project.

E12: None of the participating organisations have convictions for fraudulent behaviour, other financial irregularities or illegal business practices.

Fraudulent behaviour is grounds for exclusion as it endangers the project, the interests of other participants and ultimately the tax payer. Exclusion may be on the basis of, but not limited to, fraudulent behaviour, criminal convictions, or the receipt of an administrative penalty. Exclusion of a single participant will lead to the ineligibility and rejection of the project.

E13: None of the participating organisations have been declared bankrupt or are in the process of being declared bankrupt.

- In the process of being declared bankrupt but still trading,
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Bankruptcy (or the process of bankruptcy) is grounds for exclusion as it endangers the project, the interests of other participants and ultimately the tax payer. Exclusion of a single participant will lead to the ineligibility and rejection of the project.

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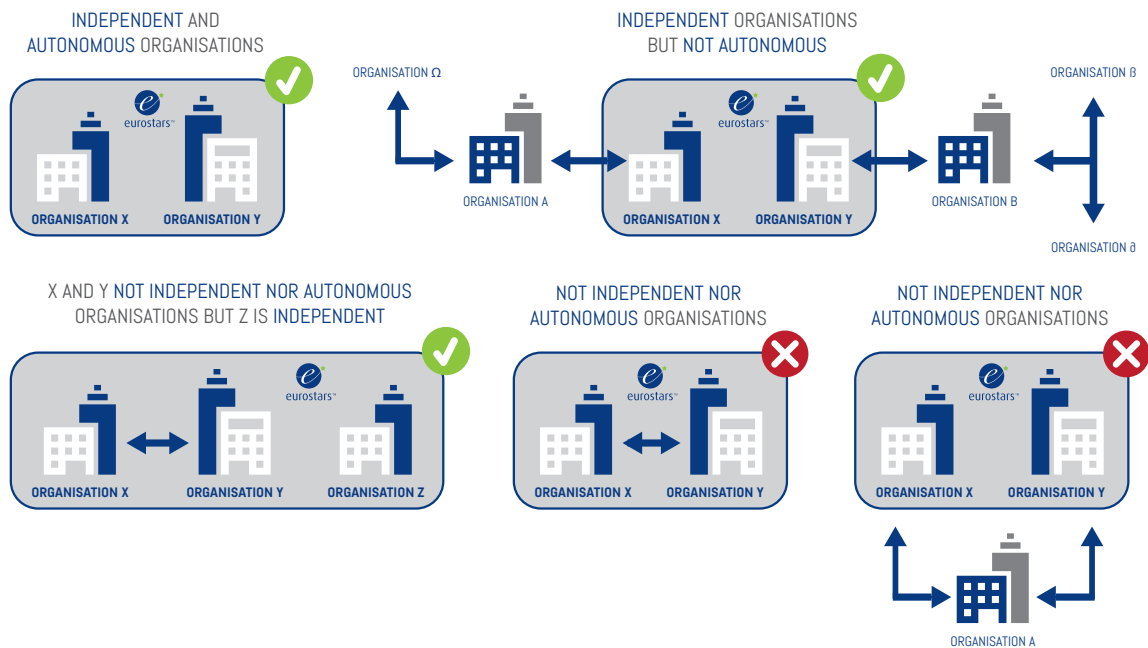
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Eurostars Partner country: Switzerland and South Korea

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To be eligible, the partnership must include at least two legal entities independent of each other, meaning that neither is under the direct or indirect control of the other or under the same direct or indirect control as the other.

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Organisations which are not full participants within the project (e.g. subcontractors) are not considered.

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In either case, the 50.00% budget threshold must be met by R&D-performing SME(s) located in Eurostars Participating state(s) or Partner Country(ies).

Calculation:

% R&D-performing SME contribution is calculated as:

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Calculation:

The time difference between the planned end of the project and planned market entry of the main product/process/service (as mentioned within the application) is calculated.

Consideration:

This will also form part of the evaluation, with the quoted figure in the application being evaluated with respect to its feasibility.

E10: The project meets the EUREKA criteria and must have a civilian purpose.

To be eligible, the project can address any technology area, but must have a civilian purpose and be aimed at the development of a new product, process or service.

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To be eligible, each participant must be a legal entity, as defined by the legislation of the country where it is hosted. Being a legal entity elsewhere within the EU or in another Eurostars country is not sufficient. Ineligibility of a single participant will lead to the ineligibility and rejection of the project.

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- In the process of being declared bankrupt but still trading,
- Legally declared bankrupt

Bankruptcy (or the process of bankruptcy) is grounds for exclusion as it endangers the project, the interests of other participants and ultimately the tax payer. Exclusion of a single participant will lead to the ineligibility and rejection of the project.

Questa nota ha lo scopo di approfondire i punti salienti del bando. Per l'elaborazione delle proposte progettuali si raccomanda una lettura approfondita dei documenti ufficiali messi a disposizione dalla Commissione europea.

Il Programma Eurostars 2 ha pubblicato il bando per l'annualità 2015.

1. Obiettivi

Eurostars II è il programma che supporta le PMI “research – performing”, fornendo finanziamenti per progetti di ricerca e innovazione (R&I) con l'obiettivo di sostenere lo sviluppo e la produzione di prodotti che potranno poi essere rapidamente commercializzati. Il nuovo programma 2014 – 2020 di Eurostars II **è diretto a promuovere le attività di ricerca orientate al mercato e contribuire alla realizzazione dello “Spazio europeo della ricerca” (SER)**, per migliorare l'accessibilità, l'efficienza e l'efficacia dei finanziamenti pubblici a favore delle PMI in Europa che svolgono attività di ricerca. Eurostars II persegue **tre obiettivi principali**:

- Incoraggiare le PMI nello sviluppo di nuove attività produttive basate sui risultati dei progetti di R&I;
- Creare una rete internazionale di supporto alle attività di ricerca delle PMI;
- Aiutare le PMI a sviluppare rapidamente nuovi prodotti, processi e servizi per il mercato.

Ad oggi, i 41 Paesi membri di EUREKA, tra cui l'Italia, hanno aderito al programma fornendo risorse economiche necessarie a finanziare progetti di ricerca e innovazione comuni. In particolare, il nuovo programma **Eurostars II** prevede un finanziamento complessivo di **oltre 1,1 miliardi di euro**, di cui 287 milioni messi a disposizione dalla Commissione europea tramite il programma per la ricerca e l'innovazione 2014 – 2020, Horizon 2020, e fondi messi a disposizione dagli Stati membri di EUREKA per un totale di 861 milioni di euro.

2. Bando 2015

Come già avvenuto per il primo bando 2014, Eurostars II ha lanciato anche per il 2015 un unico bando. Le attività di ricerca ammissibili al finanziamento riguardano tutte le azioni classificabili come “ricerca industriale” e “sviluppo sperimentale”. **Non sono quindi indicate aree tematiche privilegiate o escluse, tranne che per le applicazioni militari.**

Periodo di implementazione

La durata massima dei progetti è di 36 mesi, mentre il prodotto deve essere introdotto sul mercato non oltre i 24 mesi successivi al completamento del progetto.

3. Criteri di ammissibilità

Possono partecipare al programma **PMI innovative, università, enti/organismi di ricerca** (pubblici o privati) **e grandi imprese**.

Per essere eleggibile la proposta progettuale deve soddisfare i seguenti requisiti:

- 1) **Il leader del consorzio deve risiedere in uno dei 34 Paesi EUREKA;**
- 2) **Il leader del consorzio deve corrispondere alla definizione di “PMI Innovativa”**, cioè soddisfare uno dei **due criteri** indicati di seguito:
 - a) Dedicare una soglia minima di **forza lavoro “Full Time Equivalent”** ad attività di R&I (il valore di un “equivalente lavoro a tempo pieno” è di 1,00 – 8 ore al giorno);
 - b) Dedicare una percentuale del **fatturato** fissato da EUREKA ad attività di R&I.In particolare, si considerano **“PMI Innovative”** le seguenti categorie di imprese:
 - **PMI con un organico che non supera i 100 lavoratori FTE** che soddisfano almeno **uno dei tre criteri** indicati di seguito:
 - impiegano un equivalente minimo di 5,0 della forza lavoro FTE in attività di R&I;
 - impiegano almeno il 10,00% della forza lavoro FTE in attività di R&I;
 - destinano almeno il 10,00% del fatturato ad attività di R&I.

- **PMI con un organico di oltre 100 dipendenti FTE** che:
- impiegano un equivalente minimo di 10,0 della forza lavoro FTE in attività di R&I;
 - impiegano almeno il 10,00% della forza lavoro FTE ad attività di R&I;
 - destinano almeno il 10,00% del fatturato ad attività di R&I.
- 3) Il consorzio di progetto deve coinvolgere **almeno due soggetti di diritto indipendenti l'uno dall'altro** provenienti da **due differenti Paesi aderenti al Programma** (tra cui l'Italia);
- 4) Il budget del progetto deve prevedere una soglia minima equivalente al **50% della proposta progettuale destinata allo svolgimento di attività di R&I** (sono esclusi i costi relativi al subappalto);
- 5) **Una singola entità del consorzio non può essere responsabile di oltre il 75,00% del bilancio** totale del progetto;
- 6) Il progetto può riguardare qualsiasi area tecnologica, ma **deve avere uno scopo civile ed essere finalizzato allo sviluppo di un nuovo prodotto, processo o servizio** destinato alla commercializzazione;
- 7) **Ogni partecipante deve essere un soggetto di diritto**, come definito dalla legislazione del Paese che lo ospita. L'inammissibilità di un singolo partecipante porterà alla ineleggibilità e al rifiuto del progetto;
- 8) **Le entità che partecipano al consorzio non devono avere delle condanne precedenti** per irregolarità finanziarie, pratiche commerciali illegali, **essere state dichiarate fallite** o essere in fase di dichiarazione di fallimento. L'esclusione di una singola entità comporta l'ineleggibilità del consorzio e dunque il rigetto dell'intera proposta progettuale.

Modalità di candidatura

Le domande di candidatura potranno essere presentate previa registrazione, [sul sito di Eurostars 2](#), utilizzando il modulo di riferimento indicato. In seguito alla registrazione i dati saranno inviati agli organismi nazionali indicati da EUREKA, il MIUR per l'Italia, che provvederà a fornire attività di informazione e supporto ai partecipanti.

Si segnala in particolare che **le organizzazioni italiane che volessero partecipare al bando devono inviare al MIUR, via posta elettronica certificata, i seguenti documenti**: domanda di finanziamento, le dichiarazioni del richiedente, dichiarazione sulla sostenibilità finanziaria, tabella dei costi.

La presentazione di questi documenti al MIUR è obbligatoria. Nel caso in cui tali documenti non siano stati presentati correttamente o non siano stati presentati affatto, il consorzio richiedente sarà considerato ineleggibile.

Modalità di valutazione

Le domande di finanziamento per il programma Eurostars II passano attraverso un processo di selezione che prevede sia l'esame del progetto da parte di un gruppo di esperti, sia da parte di imprese esperte in ambito internazionale.

Le valutazioni seguiranno i seguenti requisiti:

- 1) **Qualità ed efficienza** della fase di attuazione:
 - Qualità del consorzio
 - Valore aggiunto attraverso la cooperazione
 - Management progetto
 - Struttura dei costi ragionevole
- 2) **Eccellenza** in ricerca e innovazione:
 - Grado di innovazione
 - Nuova conoscenza applicata
 - Livello di sfida tecnica
 - Realizzabilità tecnica e rischio

3) **Impatto** del progetto sul mercato:

- Prospettive di competitività rispetto alle dimensioni del mercato
- Accesso al mercato e rischio (certificazioni, regolamentazione, prezzi)
- Vantaggio competitivo
- Chiari e realistici piani di commercializzazione

Durante la fase di valutazione gli organismi nazionali indicati da EUREKA, il MIUR per l'Italia, saranno responsabili per la **valutazione della solidità finanziaria della proposta di finanziamento**. In particolare, sono incaricati di valutare la capacità finanziaria dei rispettivi richiedenti e determinare se sono in grado di intraprendere il lavoro descritto nella proposta di finanziamento e sono dunque idonei a ricevere finanziamenti pubblici.

La capacità finanziaria non costituisce un criterio di eleggibilità. Ciò non significa che un progetto che non soddisfi questo requisito venga escluso automaticamente. Tuttavia, **una valutazione negativa potrebbe essere uno dei fattori determinanti per la valutazione dell'insieme.**

5. Budget

Trattandosi di un programma co-finanziato dalla Commissione europea e da Fondi Nazionali, **i costi ammissibili e l'importo dei finanziamenti dipendono dai Paesi coinvolti nel progetto.**

In particolare per l'Italia, come indicato dal seguente grafico, il bando segue linee di co-finanziamento differenti per le diverse tipologie di organizzazione.

Tipo di organizzazione	% costi elegibili	Finanziamento massimo	Ulteriori informazioni
Piccole imprese	Ricerca Industriale: 40% Sviluppo sperimentale: 30%	1.000.000,00 euro	È possibile un prestito aggiuntivo alla sovvenzione su richiesta
Medie imprese	Ricerca industriale: 30% Sviluppo sperimentale: 20%	1.000.000,00 euro	È possibile un prestito aggiuntivo alla sovvenzione su richiesta
Grandi imprese	Ricerca industriale: 20% Sviluppo sperimentale: 10%	1.000.000,00 euro	È possibile un prestito aggiuntivo alla sovvenzione su richiesta
Università	Ricerca industriale: 50% Sviluppo sperimentale: 25%	1.000.000,00 euro	
Organizzazioni di ricerca	Ricerca industriale: 50% Sviluppo sperimentale 25%	1.000.000,00 euro	
Altri		1.000.000,00 euro	
Prestiti aggiuntivi alla sovvenzione destinati ai richiesti solo per imprese o tutte le organizzazioni private		1.500.000,00 euro	

Relativamente ai costi sostenuti durante tutta la durata del progetto questi saranno ammissibili per: personale, attrezzature subappalto, consumo, diffusione di informazioni, attività di coordinamento e spese generali.

6. Calendario

Fasi	Date e orari o periodi
Pubblicazione del bando	1 giugno 2015
Scadenza invio candidature	17 settembre 2015, ore 20.00 Orario di Bruxelles

7. Contatti

Per il MIUR i responsabili del programma Eurostars II per aspetti di natura internazionale sono:

- Valentina Cardinale
e-mail: cnc@miur.it
tel. 06 9772 7549

Mentre per aspetti di natura nazionale i referenti sono:

- Dott. Aldo Covello, *National Project Coordinator*
email: aldo.covello@miur.it.

8. Siti web di riferimento

Per ulteriori informazioni si rimanda al sito ufficiale del [Programma Eurostars II](#) e al [Participant Portal](#).