

**CALL FOR SMES – THE CE4RT SUPPORT PROGRAMME FOR SMES**



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## 1. SUMMARY OF INFORMATION

CE4RT (Circular Economy for Regenerative Tourism) is a project co-funded by the European Commission to assist tourism SMEs in their sustainability journey.

The CE4RT Consortium includes the following partners:

- Ita-Savon Koulutuskuntayhtymä, Finland - <https://samiedu.fi/>
- Islenski Feroaklasinn, Iceland - [www.icelandtourism.is/en/about/](http://www.icelandtourism.is/en/about/)
- Burren Talk Ltd. T/A The Tourism Space, Ireland - [www.thetourismspace.com](http://www.thetourismspace.com)
- Dingle Peninsula Tourism Alliance, Ireland – [www.dingle-peninsula.ie](http://www.dingle-peninsula.ie)
- Munster Technological University, Ireland – [www.mtu.ie](http://www.mtu.ie)
- Stichting Business Development Friesland, The Netherlands [www.bdfriesland.nl](http://www.bdfriesland.nl)
- Danmar Computers SP Zoo, Poland - [www.danmar-computers.com.pl](http://www.danmar-computers.com.pl)

The programme will fund 80 selected SMEs up to €8,000 each to complete the following activities:

- Training in sustainable and regenerative tourism
- One-to one coaching – To provide support in measuring the carbon baseline of the SME and develop a sustainability plan
- Certification – Sustainable Tourism Certification from a provider of your choice.
- Networking – Participate with like-minded tourism SMEs to share learning and the sustainability journey

Based on the selection process detailed below, the highest ranking 80 SMEs (minimum 12 per country) will be chosen to receive funding under this programme. The five countries eligible to receive funding through CE4RT are:

- Finland
- Iceland
- Ireland
- The Netherlands
- Poland

This document outlines the CE4RT project and provides details of the recruitment and selection process for the SME call to get involved in this exciting opportunity.



## 2. OBJECTIVES OF THE PROJECT AND DESCRIPTION OF THE SUPPORT SCHEME

The main objective of CE4RT is to directly support SMEs in transitioning to a circular and regenerative tourism business model thus enabling the future resilience of this sector. This is a collaborative project supporting a network of tourism SMEs across five partner European countries in the areas of Sustainable Practice, the Circular Economy and Regenerative Tourism.

The project commenced in January 2023 and will continue until January 2025 with an overall budget of 1.17 million Euro funded through the European Innovation Council and SME's Executive Agency (EISMEA) Union Single Market Programme – COSME-2021-TOURSME.

### 2.1 SUMMARY OF CE4RT PROGRAMME FOR TOURISM SMES

|                                    |   |
|------------------------------------|---|
| FUNDING available to SMEs selected | Up to € 8,000 per SME                                       |
| PROGRAMME ACTIVITIES               | Training<br>Coaching<br>Certification<br>Networking         |
| APPLICATION DATES                  | 7 <sup>th</sup> July 2023 – 28 <sup>th</sup> September 2023 |
| PROGRAMME TIMELINE                 | November 2023 – November 2024                               |

CE4RT seeks to provide financial and business support to a minimum of 80 tourism SMEs through a programme (maximum EUR 8,000 per SME) with the following objectives:

1. To develop a peer-to-peer focused approach and share knowledge, expertise and best practice among tourism SMEs, in relation to the circular economy and regenerative tourism practices.
2. To deliver hands on training for tourism SMEs in developing sustainability practices and influencing positive behavioural changes amongst visitors.
3. To provide funding towards achieving recognised sustainability accreditation/certification.
4. To support tourism SMEs in the adoption of sustainable best practice through one-to-one coaching to develop sustainable plans and measure carbon footprint and coaching.
5. To offer tourism SMEs the opportunity to participate in international networking events.
6. To encourage tourism SMEs and other stakeholders in the development of innovative solutions towards regenerative tourism.

A **fully funded** programme of activities will be provided for the selected 80 SMEs (minimum of 12 SMEs from each country) from across the network to include a suite of knowledge and



training based on their specific needs and readiness stage in the sustainable journey in Ireland, Poland, Finland, Netherlands, Iceland.

**TRAINING – UNDERTAKE THE BASIC TRAINING REQUIRED OF PARTICIPATION IN THE PROGRAMME – THIS TRAINING IS FREE OF CHARGE TO SMES.**

A selection of modules will be available for the SME to choose from. There will be 4 mandatory modules and 3 elective modules in which the SME creates a portfolio of outputs (please see details below). The SME will also be required to complete a series of masterclasses from experts in the field of the circular economy and regenerative tourism.

**COACHING & CERTIFICATION - SMES WILL RECEIVE UP TO 8000€ EACH TO COVER PERSONALISED COACHING & CERTIFICATION**

**COACHING – SELECT THE COACHING THAT SUITS THEM BEST ON THEIR SUSTAINABILITY JOURNEY**

One-to-One coaching is provided to support the development of a sustainability plan for each SME's business and advise them on the correct path for sustainable tourism processes and certification. Further networking opportunities and best practice examples will feature throughout the coaching. The coaching will be enhanced by online workshops on how to influence visitors through sustainable practices and behavioural change (details below).

**CERTIFICATION**

- **COMPLETE CERTIFICATION THAT SUITS THEIR BUSINESS NEEDS AND STAGE OF READINESS SUPPORTED BY THEIR SUSTAINABILITY COACH.**

The SME will be encouraged and can choose to progress to sustainable certification on the advice of the coach based on their priorities and sustainability plan.

- **MEASUREMENT – COMPLETE MANDATORY REPORTING TO MEASURE THEIR SUSTAINABILITY JOURNEY.**

SMEs will be expected to share non-commercial data of their sustainability journey within the project. This will include social, economic, environmental and cultural impacts. Once again support and training will be provided for this activity.

**NETWORKING – PARTICIPATE IN NETWORKING EVENTS ONLINE AND OR IN PERSON TO SUPPORT PEER LEARNING AND SHARING BEST PRACTICE.**

The SME will have an opportunity to engage online with like-minded tourism SMEs throughout the programme. All online training will facilitate engagement for peer to peer networking, giving participants time to discuss their learnings from the programme and share their challenges.

In person events will take place in Iceland in April 2024 and in Ireland in November 2024, SMEs can apply to attend one of these events where they will engage in training workshops or certification processes.

## POTENTIAL BENEFITS FOR PARTICIPATING SMES

The key potential benefits of participation in the CE4RT programme for SMEs are:

- Support and coaching in generating a **profitable business**.
- Guidance in tackling **climate action**.
- Training on how your SME can have **a positive benefit on your community**.
- Learning how to **preserve the destination** including its heritage, culture and nature.
- Education on **informing visitors** of their positive impact on the destination.
- Networking opportunities to **share the journey** with the wider European community.

### Additional benefits could include:

- Access to all learning materials, online training, webinars and best practice examples.
- Meeting and learning from experts.
- Networking and knowledge sharing with SMEs from other destinations participating in the programme.
- Development of a sustainability plan (strategy and action plan).
- Support in achieving a sustainable supply chain.
- Inclusion in promotional and dissemination activities at regional, national and EU level.

## 3. WHAT IS THE CIRCULAR ECONOMY? WHAT IS REGENERATIVE TOURISM?

The **Circular Economy** provides opportunities for the individual tourism business, the destination and from the perspective of the visitor.

- *Business Perspective* – Circular economy can support competitiveness and provide opportunities for innovation, diversification and differentiation.
- *Destination perspective* – Circular economy can bridge the gap between the tourism business and the local community by supporting local and providing opportunities for employment and general wellbeing.
- *Visitor Perspective* - it can provide the opportunity to leave a positive impact on the destination (UNWTO, 2022)<sup>1</sup>

**Regenerative Tourism** places an emphasis on a whole systems approach that provides the host community and the tourist with the same prominence in terms of tourism development. It supports the idea that the tourism destination should be in a better place after the tourist visit. The whole systems approach to regeneration is about the land, the people, the culture/heritage, the community and the wildlife (McEnhill et. al., 2020).

<sup>1</sup> <https://www.oneplanetnetwork.org/programmes/sustainable-tourism/circular-economy/tools-resources>

This project, **CE4RT**, will have a particular focus on the local community and the visitor who both play a role in the regenerative process. The host community not only form part of the place and the visitor experience but also in their role as suppliers of goods and services and in the delivery of an authentic interpretation of a destination's culture and heritage. CE4RT seeks to provide training and coaching on the communications piece to tourists and in the development of innovative behavioural changes that inform the tourist on how their actions can have a positive impact on the destination being visited.

#### 4. OVERVIEW OF FUNDING

Financial support of up to €8,000 per Tourism SME can be used to support the activities outlined in Streams 2 and 3 below.

Funding is provided to the SMEs in three staged lump-sum payments:

Payment 1: 20% at commencement of the programme (approx. November 2023) and agreement of SME's personalised programme of work.

Payment 2: 60% on completion of Stream 1 (approx. Feb 2024) and provision of expense receipts from payment 1.

Payment 3: 20% on completion of both Streams 2 & 3 (approx. Nov 2024) with provision of outstanding expense receipts.



## 5. SME PROGRAMME OF ACTIVITIES

There are 3 streams of activities as part of the CE4RT programme which are explained in detail in Figure 1 below.



Figure 1 - Overview of SME Programme of Activities

**\*PLEASE NOTE THAT TRAINING MODULES AND MASTERCLASSES WILL BE FREE OF CHARGE AND SMES WILL RECEIVE UP TO 8000€ EACH TO COVER PERSONALISED COACHING & CERTIFICATION**

### 5.1 Stream 1 Activities – Training Modules, Masterclass Series, Digital Badge

A selection of training modules and masterclass lectures **will be provided at no cost to the SME** but is a requirement of participation in the programme in order to build competence, capacity and knowledge.

Each SME will be required to complete 4 mandatory and 3 elective modules, attend 10 masterclasses and produce a portfolio of work from which they will acquire an internationally recognised digital sustainability badge.

The masterclass sessions will be delivered online and provides an opportunity for the SME to learn from International Experts and best practice examples of regenerative tourism and supporting peer-to-peer networking.

The modules and masterclass content have been developed from extensive research through literature reviews, best practice case studies and surveys conducted with over 200 tourism SMEs to help identify what training will be most valuable to advance the sustainability agenda and help achieve the objectives of this project.



**ONLINE TRAINING MODULES**

| <b>MANDATORY MODULES</b><br>One hour/week   | <b>ELECTIVE MODULES</b><br>Selection of any three elective modules that best suit their needs<br>One hour/week   | <b>MASTERCLASSES</b>  |
|---|--|---|
| 1. Green certification awareness<br>2. Innovative sustainable tourism models - introduction to circular economy & regenerative tourism<br>3. Practical initiatives for sustainability<br>4. Measuring for success | 1. Citizen science<br>2. Community tourism at its best<br>3. Biodiversity & nature interpretation<br>4. Celebrating success – marketing & storytelling<br>5. Digital by design<br>6. Be SMART* - Changing Behaviour to support sustainability practices <sup>2</sup><br>7. Visitor Impact - Leave No Trace* <sup>3</sup> | 10 masterclasses will be delivered by international experts |

**Training modules and masterclasses will be FREE OF CHARGE as above and up to 8000€ per SME will be provided to the approved SMEs, within the duration of the Support Scheme, for the coaching and certification activities described in sections 5.2 (Stream 2) and 5.3 (Stream 3) below:**

**5.2 Stream 2 Activities – Coaching (Financial Support for SMEs provided)**

The following activities will be included in Stream 2:

- Conducting a sustainability self-audit for SMEs & developing sustainability strategy and action plans: SMEs will choose their own sustainability coach to suit their needs which must be pre-approved by CE4RT. Coaches will take part in a CE4RT induction programme and will provide one-to-one coaching towards the development of the SME’s self-audit, sustainability plan and personalised implementation strategy.
- Upskilling and re-skilling for tourism SMEs on sustainability, relevant digital innovation and data management processes: Further training provided by BE-SMART on the First Mile

<sup>2</sup> BeSMART - The First Mile™ activation programme is designed to accompany SMEs on a supported journey of achieving measurable progress that optimizes the footprint of your business.

<https://behavior-smart.com/services/tourism-businesses/>

<sup>3</sup> LEAVE NO TRACE – Is an international programme designed to limiting impacts that come with the increase of recreational use through visitor education.

<https://www.leavenotraceireland.org/>



Behavioural Change and the implementation of this approach or similar consumer behaviour training for Regenerative Tourism.

- Sharing sustainability relevant data and information within the constructs of the project: including measurement tools such carbon calculator or other measurements such as visitor behavioural change and community supports. Please note that full details of data management are detailed in section 7 and that the data will be processed only for management and statistical purposes (including publishing of general information by the project partners and EISMEA, and sharing data with grant awarding body).
- Networking activities to develop socially sustainable tourism models to create a positive impact on local communities and reduce problems of over tourism: Networking opportunities within and across the partner countries will be made available online throughout the programme.

### 5.3 Stream 3 Activities – Certification (Financial Support for SMEs provided)

**Supported SMEs can avail of the following dependent on their sustainability needs identified through the coaching:**

- Eligible costs include additional training based on specific needs identified through the coaching in Stream 2 with an emphasis on the SMEs sustainability plan.
- \*Certification with a third-party audited certification body in each region from a list of recommended providers. To include registration fees (valid within the co-financing period and for an additional limited duration), training, support and third-party auditing.
- Workshops and conference participation in Iceland and Ireland to advance knowledge transfer, training and networking (*selected number of SMEs*).
- Funding is available for face-to-face collaboration through participation in approved activity workshops and conferences organised by the project CE4RT.



## 6. APPLICATION AND ELIGIBILITY CRITERIA.

### 6.1 MANDATORY CRITERIA TO BE ELIGIBLE FOR THE PROGRAMME

Applicants will be required to complete the application form below and will need to fulfil the following criteria:

1. Qualify as a Small or Medium Enterprise (SME), meaning having less than 250 staff and no more than €50 m in turnover or €43 m balance sheets total. ( Article 2.1 from <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32003H0361>)
2. Be registered as company in one of the territories of the CE4RT partnership: Ireland, Iceland, Finland, Poland, The Netherlands. (Should there be insufficient applications by SMEs at the end of the submission phase, the CE4RT consortium reserves the right to extend the deadline and to also extend the number of eligible countries from which SMEs can participate. Such announcements would be made publicly via the appropriate social media channels.)
3. Be able to participate in the programme through English to avail of full learnings and networking opportunities.
4. Be able to commit to a minimum of one hour per week to participate fully in the programme of activities.
5. Belong to one of these categories of the tourism industry (please see complete list with details in Appendix B):
  - Visitor Transportation (H4932; H4939; H5010; H5030; N7710)
  - Accommodation (I5510; I5520; I5530)
  - Food Service (I5610; I5630)
  - Recreation Activities (N7721; R90; R91; R93)

### 6.2 CE4RT PROGRAMME - SME APPLICATION FORM

The application form is available to complete online:

[https://docs.google.com/forms/d/e/1FAIpQLSfe2Ls3VQ1nU7DpGb7I3KOyj8MuW2f-Cl3YypPOD-Z5kuJ-Bg/viewform?usp=sf\\_linkmary](https://docs.google.com/forms/d/e/1FAIpQLSfe2Ls3VQ1nU7DpGb7I3KOyj8MuW2f-Cl3YypPOD-Z5kuJ-Bg/viewform?usp=sf_linkmary)

The text of the application form questions is shown in Appendix A.

### 6.3 CE4RT SCORING MATRIX

Once the applicant has met the mandatory requirements as outlined in section 6.1 above, they are then scored on a number of qualifier questions. Questions are scored from 1 to 5 (where 5 is the highest score) and all questions carry equal weighting.

- Questions 1 to 5 are qualifier questions and are YES/NO responses.
- Questions 6 to 8 are evidence of engagement
- Questions 9 to 13 are open-ended and are scored depending on the response provided
- Questions 14 to 22 are self-evaluations

The SMEs with the top scores in each country will be offered a place on the programme with the remaining SMEs being held on a waiting list in order of scores.

For applicants with the same scores, preference will be given as per the table below:

| <b>Differentiator</b>  | <b>Score (3 is highest)</b> |
|--|-----------------------------|
| Businesses in a destination cluster which has several members in the successful applicant pool | 3                           |
| Businesses under-represented by NACE code  | 2                           |
| Businesses under-represented by business size  | 1                           |

All applicants, regardless of scoring, will be invited to attend the free training modules and masterclass series.

Each application is scored by two members of the CE4RT team (one from the SME home country\*, one from another partner country), the average of the two scores will produce the final score. \*Please note that where there may be any potential for a conflict of interest (e.g. consortium member works closely with a particular tourism SME) then an alternative evaluator will be appointed from the consortium.

## 6.4 SME AWARD CRITERIA RATING MATRIX

| CRITERIA  |         |                              |                           |                |                    |
|---|---------|------------------------------|---------------------------|----------------|--------------------|
| ESSENTIAL – MANDATORY REQUIREMENTS  |         |                              |                           |                |                    |
|   | YES     | NO                           |                           |                |                    |
| 1.SME STATUS  |         |                              |                           |                |                    |
| 2.REGISTERED COMPANY IN PARTNER COUNTRY                                   |         |                              |                           |                |                    |
| 3.ENGLISH LANGUAGE  |         |                              |                           |                |                    |
| 4.TIME COMMMITMENT  |         |                              |                           |                |                    |
| 5.NACE CODE   |         |                              |                           |                |                    |
| QUALIFIERS – RATING   |         |                              |                           |                |                    |
| Scoring Level   | 1       | 2                            | 3                         | 4              | 5                  |
| 6.Years in Business   | Startup | 1-2 Years                    | 2-3 Years                 | 3-5 Years      | 5+                 |
| 7.Member of Tourism Network and Number of Years of Membership             | NO      | 1-2 Years                    | 2-3 Years                 | 3-5 Years      | 5+                 |
| 8.Sustainability Accreditation  | NO      | NO but interested            | YES                       | YES RELEVANT   | YES RELEVANT LEVEL |
| Motivation and Expectations for the programme (Open ended questions 9-13) | NONE    | EVIDENCE OF MINIMAL ACTIVITY | EVIDENCE OF SOME ACTIVITY | CLEAR EVIDENCE | EXCELLENT          |
| 9.Motivation  | NONE    | EVIDENCE OF MINIMAL ACTIVITY | EVIDENCE OF SOME ACTIVITY | CLEAR EVIDENCE | EXCELLENT          |
| 10. Local community engagement  | NONE    | EVIDENCE OF MINIMAL ACTIVITY | EVIDENCE OF SOME ACTIVITY | CLEAR EVIDENCE | EXCELLENT          |
| 11. Culture/Natural environment   | NONE    | EVIDENCE OF MINIMAL ACTIVITY | EVIDENCE OF SOME ACTIVITY | CLEAR EVIDENCE | EXCELLENT          |
| 12. Destination USP (Unique Selling Point)                                | NONE    | EVIDENCE OF MINIMAL ACTIVITY | EVIDENCE OF SOME ACTIVITY | CLEAR EVIDENCE | EXCELLENT          |
| 13. Level of activity in specific sectors                                 | NONE    | EVIDENCE OF MINIMAL ACTIVITY | EVIDENCE OF SOME ACTIVITY | CLEAR EVIDENCE | EXCELLENT          |
| Rating of priorities (Self-evaluation questions 14-22)                    | 1       | 2                            | 3                         | 4              | 5                  |
| 14.Local Community  |         |                              |                           |                |                    |
| 15.Culture and Heritage of the Destination                                |         |                              |                           |                |                    |
| 16.Natural Environment  |         |                              |                           |                |                    |
| 17.Collaboration with other businesses                                    |         |                              |                           |                |                    |
| 18. Local Festivals and events  |         |                              |                           |                |                    |
| 19. Local Language Heritage and Culture                                   |         |                              |                           |                |                    |
| 20.Preservation of Natural Environment                                    |         |                              |                           |                |                    |
| 21. Importance of Sustainability  |         |                              |                           |                |                    |
| 22. Sustainability Journey  |         |                              |                           |                |                    |
| <b>SUBTOTAL</b>   |         |                              |                           |                |                    |
| <b>OVERALL SCORE</b>  |         |                              |                           |                |                    |
| <b>DIFFERENTIATORS</b>  |         |                              |                           |                |                    |
| - Destination Cluster   |         |                              |                           |                |                    |
| - NACE Code   |         |                              |                           |                |                    |
| - Size of Business  |         |                              |                           |                |                    |

- THE CALL OPENS JULY 7<sup>th</sup> 2023
- ONLY ELECTRONIC APPLICATIONS VIA THE GOOGLEFORM WILL BE CONSIDERED  
[https://docs.google.com/forms/d/e/1FAIpQLSfe2Ls3VQ1nU7DpGb7I3KOyj8MuW2f-CI3YypPOD-Z5kuJ-Bg/viewform?usp=sf\\_linkmary](https://docs.google.com/forms/d/e/1FAIpQLSfe2Ls3VQ1nU7DpGb7I3KOyj8MuW2f-CI3YypPOD-Z5kuJ-Bg/viewform?usp=sf_linkmary)
- ONLY APPLICATIONS RECEIVED BEFORE SEPTEMBER 30<sup>th</sup> 2023 WILL BE CONSIDERED
- ANY QUESTIONS ON THE APPLICATION PROCESS OR THE CE4RT PROJECT SHOULD BE DIRECTED TO [Kristin.Brogan@mtu.ie](mailto:Kristin.Brogan@mtu.ie) BETWEEN JULY 7<sup>th</sup> and SEPT 17<sup>th</sup> 2023.
- CALL REMAINS OPEN FROM 7<sup>th</sup> July until September 28<sup>th</sup> 2023
- REVIEW OF APPLICATIONS OCTOBER 2023
- NOTIFICATION TO SELECTED, RESERVE LIST AND UNSUCCESSFUL SMES OCTOBER 2023
- TOP 12-16 SMEs IN EACH COUNTRY WILL BE SELECTED, A RESERVE LIST OF 4-8 SMEs PER COUNTRY WILL BE CREATED, UNSUCCESSFUL APPLICANTS WILL BE OFFERED THE OPPORTUNITY TO PARTICIPATE IN THE FREE TRAINING MODULES AND MASTERCLASSES
- PROGRAMME COMMENCES NOVEMBER 2023
- **TRAINING MODULES AND MASTERCLASSES WILL BE FREE OF CHARGE AND SMEs WILL RECEIVE UP TO 8000€ EACH TO COVER PERSONALISED COACHING & CERTIFICATION**



## 7. DECLARATIONS AND OBLIGATIONS OF PARTICIPANTS

Participants must respect the following declarations and obligations:

- Obligation to submit reports.
- Obligation to keep records and other supporting documentations related to funded costs for at least 5 years.
- General obligation to properly participate to the activities (at least 90%).
- Not being entrepreneur in difficulty (according to the point 14 of the Commission Regulation (EU) No 651/2014 of 17 June 2014).
- To be operating in one of the registered Business Activities listed in the Call for Announcement.
- Accepting their responsibility on accuracy and veracity of data and documents submitted and all conditions and obligations stated in the Call.
- Accepting to give permission to CE4RT project partners to process the data only for management and statistical purposes (including publishing of general information & sharing data with grant awarding body (European Innovation Council and SMEs Executive Agency (EISMEA)) even through digital devices with respect to the security and privacy within the law. Data processing by CE4RT Project Partners will be made in accordance with the provisions of Regulation (EU) 2016/679 and the subsequent transposing laws (jointly, the “GDPR”). Please note that SMEs will be required to sign the information/acceptance letter as per APPENDIX C of this document.
- SMEs can only submit only one application for the CE4RT project. In the case of multiple submissions, only the last application received will be considered.

### 7.1 LIABILITY, DISPUTES, REDUCTION & REVOCATION OF THE GRANT

#### A) Liability of the Consortium

The Consortium cannot be held liable for any damage caused to the third-party beneficiaries as a consequence of implementing the programme, including for gross negligence.



The Consortium cannot be held liable for any damage caused by any of the third-party beneficiaries involved in the programme, as a consequence of implementing the Third-party Beneficiary Agreement.

### **B) Liability of the third-party beneficiaries**

Except in case of force majeure, the third-party beneficiaries must compensate the Consortium for any damage it sustains as a result of the implementation of the action or because the action was not implemented in full compliance with the Third-party Beneficiary Agreement.

The contribution is reduced or withdrawn by Consortium members in the following cases:

- The third-party beneficiary doesn't participate in at least 90% of the activities;
- Implemented activities do not comply with quality standards required by the Consortium and set in each SME Strategy;
- Reporting does not comply with requirements.

At any moment of implementation of the action and afterwards, the Consortium has the right to carry out checks, reviews and audits, to ascertain:

- The proper use of the financed services;
- Compliance with the obligations of the call;
- The truthfulness of the declarations and information produced by the third-party beneficiary.

If the case occurs that checks, reviews and audits cannot be completed for reasons attributable to the third-party beneficiary, the contribution may be revoked or reduced and may lead to criminal prosecution under national law.

The contribution will be revoked in case of express renunciation of the contribution by the third-party beneficiary.



In case of revocation, any pre-financing received by the third-party beneficiary must be reimbursed, legal interests included, to the Consortium within 15 calendar days from the official communication.

## **7.2 CHECKS, REVIEW, AUDITS AND INVESTIGATIONS – EXTENSIONS OF FINDINGS**

### **A) Checks, reviews and audits by the grant awarding body EISMEA and the Consortium**

#### **A.1 Right to carry out checks**

The grant awarding body EISMEA and/or the Consortium will — during the implementation of the action or afterwards — check the proper implementation of the action and compliance with the obligations under the Agreement, including assessing deliverables and reports.

For this purpose, the grant awarding body EISMEA and/or the Consortium may be assisted by external persons or bodies.

The grant awarding body EISMEA and/or the Consortium may also request additional information. They may request the third-party beneficiaries to provide such information to it directly.

Information provided must be accurate, precise and complete and in the format requested, including electronic format.

#### **A.2 Right to carry out reviews**

The grant awarding body EISMEA and/or the Consortium may — during the implementation of the action or afterwards — carry out reviews on the proper implementation of the action (including assessment of deliverables and reports) in compliance with the obligations under the Third-party Beneficiary Agreement.

Reviews may be started up to five years after the payment of the balance from EISMEA to the Consortium. They will be formally notified to the third-party beneficiary concerned and will be considered to have started on the date of the formal notification.

In case of a review by EISMEA, reviews will be notified to the Consortium and the Consortium must inform third-party beneficiaries.



The third-party beneficiary concerned must provide — within the deadline requested — any information and data in addition to deliverables and reports already submitted (including information on the use of resources). EISMEA may request third-party

beneficiaries to provide such information to it directly.

The Consortium coordinator, beneficiaries or third-party beneficiaries concerned may be requested to participate in meetings, including with external experts.

For on-the-spot reviews, the third-party beneficiaries must allow access to their sites and premises, including to external persons or bodies, and must ensure that information requested is readily available.

Information provided must be accurate, precise and complete and in the format requested, including electronic format.

### **A.3 Right to carry out audits**

The grant awarding body EISMEA and/or the Consortium may — during the implementation of the action or afterwards — carry out audits on the proper implementation of the action and compliance with the obligations under the third-party beneficiary agreement.

Audits may be started up to five years after the payment of the balance by EISMEA to the Consortium. They will be formally notified to the Consortium coordinator and the Consortium will notify third-party beneficiaries concerned and will be considered to have started on the date of the formal notification.

If the audit is carried out on a third-party beneficiary, the Consortium beneficiary concerned must inform the third-party beneficiary.

EISMEA may carry out audits directly (using its own staff) or indirectly (using external persons or bodies appointed to do so). It will inform the Consortium coordinator, beneficiaries and third-party beneficiaries concerned of the identity of the external persons or bodies. They have the right to object to the appointment on grounds of commercial confidentiality.

The Consortium coordinator, beneficiaries and third-party beneficiaries concerned must provide —within the deadline requested — any information (including complete accounts, individual salary statements or other personal data) to verify compliance with the third-party beneficiary agreement.

EISMEA may request beneficiaries to provide such information to it directly.

For on-the-spot audits, the third-party beneficiaries must allow access to their sites and premises, including to external persons or bodies, and must ensure that information requested is readily available.

Information provided must be accurate, precise and complete and in the format requested, including electronic format.

#### **B) Investigations by the European Anti-Fraud Office (OLAF)**

Under Regulations No 883/20137 and No 2185/968 (and in accordance with their provisions and procedures), the European Anti-Fraud Office (OLAF) may — at any moment during implementation of the action or afterwards — carry out investigations, including on-the-spot checks and inspections, to establish whether there has been fraud, corruption or any other illegal activity affecting the financial interests of the EU.

#### **C) Checks and audits by the European Court of Auditors (ECA)**

Under Article 287 of the Treaty on the Functioning of the European Union (TFEU) and Article 161 of the Financial Regulation No 966/20129, the European Court of Auditors (ECA) may — at any moment during implementation of the action or afterwards — carry out audits. The ECA has the right of access for the purpose of checks and audits.

#### **D) Consequences of non-compliance**

If a third-party beneficiary breaches any of its obligations under this Call, any insufficiently substantiated costs will be ineligible and will be rejected.

### **7.3 EVALUATION OF THE IMPACT OF THE ACTION**

#### **A) Right to evaluate the impact of the action**

EISMEA and the Consortium may carry out interim and final evaluations of the impact of the action measured against the objective of the EU programme.

Evaluations may be started during implementation of the action and up to five years after the payment of the balance from EISMEA to the Consortium. The evaluation is considered to start on the date of the formal notification to the coordinator or beneficiaries.

EISMEA may make these evaluations directly (using its own staff) or indirectly (using external bodies or persons it has authorised to do so).

The Consortium coordinator, beneficiaries and third-party beneficiaries must provide any information relevant to evaluate the impact of the action, including information in electronic format.

### **B) Consequences of non-compliance**

If a third-party beneficiary breaches any of its obligations under this Call, EISMEA and the Consortium beneficiaries may apply measures as rejection of ineligible costs, reduction of the grant, recovery of undue amounts and potential administrative and financial penalties.

## **7.4 CONFLICT OF INTERESTS**

### **A) Obligation to avoid a conflict of interests**

The Consortium beneficiaries and third-party beneficiaries take all measures to prevent any situation where the impartial and objective implementation of the action is compromised for reasons involving economic interest, political or national affinity, family or emotional ties or any other shared interest ('conflict of interests').

### **B) Consequences of non-compliance**

If a Consortium beneficiary or a third-party beneficiary breaches any of its obligations under this Call, the grant may be reduced and the Agreement or participation may be terminated.

Such breaches may also lead to any of the other measures as rejection of ineligible costs, reduction of the grant, recovery of undue amounts and potential administrative and financial penalties.

## **7.5 CONFIDENTIALITY**

**A) General obligation to maintain confidentiality**

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

The confidentiality obligations no longer apply if:

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

**B) Consequences of non-compliance**

If a third-party beneficiary breaches any of its obligations under this Call, the grant may be reduced. Such breaches may also lead to any of the other measures as rejection of ineligible costs, reduction of the grant, recovery of undue amounts and potential administrative and financial penalties.

**7.6 PROMOTING THE ACTION — VISIBILITY OF EU FUNDING****A) Communication activities by the third-party beneficiaries**A.1 General obligation to promote the action and its results

The third-party beneficiaries must promote the action and its results.

A.2 Information on EU funding — Obligation and right to use the EU emblem

Unless EISMEA requests or agrees otherwise, any communication activity related to the action (including at conferences, seminars, in information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via social media, etc.) and major result funded by the grant must:

- display the EU emblem



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- include the following text:

"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Innovation Council and SMEs Executive Agency (EISME). Neither the European Union nor the granting authority can be held responsible for them."

When displayed in association with another logo, the EU emblem must have appropriate prominence. For the purposes of their obligations under this Call, third-party beneficiaries may use the EU emblem without first obtaining approval from EISMEA. This does not, however, give them the right to exclusive use. Moreover, they may not appropriate the EU emblem or any similar trademark or logo, either by registration or by any other means.

### A.3 Disclaimer excluding EISMEA responsibility

Any communication activity related to the action must indicate the following disclaimer:

*"Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Innovation Council and SMEs Executive Agency (EISMEA). Neither the European Union nor the granting authority can be held responsible for them."*

### **B) Communication activities by the Agency and the Commission**

Right to use third-party beneficiaries' materials, documents or information.

EISMEA and the Consortium may use information relating to the action, documents notably summaries for publication and public deliverables as well as any other material, such as pictures or audio-visual material received from any third-party beneficiary (including in electronic form).

This does not change the confidentiality obligations in paragraph 6.5, which still apply. The right to use third-party beneficiary's materials, documents and information includes:

a. use for its own purposes (in particular, making them available to persons working for the EISMEA or any other EU institution, body, office or agency or body or institutions in EU



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Member States and the Consortium; and copying or reproducing them in whole or in part, in unlimited numbers);

b. distribution to the public (in particular, publication as hard copies and in electronic or digital format, publication on the internet, as a downloadable or non-downloadable file, broadcasting by any channel, public display or presentation, communicating through press information services, or inclusion in widely accessible databases or indexes);

c. editing or redrafting for communication and publicising activities (including shortening, summarising, inserting other elements (such as meta-data, legends, other graphic, visual, audio or text elements), extracting parts (e.g. audio or video files), dividing into parts, use in a compilation);

d. translation;

e. giving access in response to individual requests under Regulation No 1049/200110, without the right to reproduce or exploit;

f. storage in paper, electronic or other form;

g. archiving, in line with applicable document-management rules, and

h. the right to authorise third parties to act on its behalf or sub-license the modes of use set out in points (b), (c), (d) and (f) to third parties if needed for the communication and publicising activities of EISMEA and the Consortium.

As the right of use is subject to rights of a third-party beneficiary (including personnel), the third-party beneficiary must ensure that it complies with its obligations under the Beneficiary third-party agreement (in particular, by obtaining the necessary approval from the third parties concerned). Where applicable (and if provided by the beneficiaries), EISMEA and the Consortium will insert the following information: “© – [year] – [name of the copyright owner]. All rights reserved. Licensed to the European Innovation Council and SMEs Executive Agency (EISMEA) and the European Union (EU) under conditions.”

### **C. Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Call, the grant may be reduced.



**APPENDIX A TEXT OF THE APPLICATION FORM**

Full Name \_\_\_\_\_

Email Address \_\_\_\_\_

Business Name \_\_\_\_\_

Business Address \_\_\_\_\_

1. I am an SME YES/NO
2. Which partner country is my business registered in?
  - Finland
  - Iceland
  - Ireland
  - Poland
  - The Netherlands
  - None of the above
3. Can you participate in this programme through English? YES/NO
4. Can you commit a minimum of one hour per week to this programme? YES/NO
5. Which NACE code would apply to your tourism business?
  - H4939 – Other passenger land transport n.e.c
  - H5010 – Sea and coastal passenger water transport
  - H5030 – Inland passenger water transport
  - N7710 – Rental and leasing of cars and light motor vehicles
  - I5510 – Hotels and similar accommodation
  - I5520 – Holiday and other short-stay accommodation
  - I5530 – Camping grounds, recreational vehicle parks and trailer parks
  - I5610 – Restaurants and mobile food service activities
  - I5630 – Beverage serving activities
  - N7721 – Renting and leasing of recreational and sports goods
  - R90 – Creative, arts and entertainment activities
  - R91 – Libraries, archives, museums and other cultural activities
  - R93 – Sports activities and amusement and recreation activities
6. What year was your business established? \_\_\_\_\_
7. Are you a member of a local tourism network? YES/NO
- 7a. Please specify which local tourism network or networks you are a member of  
\_\_\_\_\_
- 7b. Please specify the number of years of membership. \_\_\_\_\_
8. Have you already received sustainability accreditation for your SME? YES/NO
- 8a. Please specify what sustainability accreditation you have received and at what level  
\_\_\_\_\_





- 8b. Are you interested in pursuing sustainability accreditation for your business? YES/NO
9. What motivates you to participate in this programme? \_\_\_\_\_
10. What involvement does your business have in the local community and region?  
\_\_\_\_\_
11. What positive impact does your business have on the local, cultural and natural environment? \_\_\_\_\_
12. What defines the USP (Unique Selling Point) of your local destination? The destination in this context is your local area - depending on the circumstances this could be a village, town, region.  
\_\_\_\_\_
13. What does tourism success look like for you?
14. How important is LOCAL COMMUNITY to you? (Please rate in terms of importance to you in developing your business offering, 1 is not at all important, 5 is very important).
15. How important is CULTURE AND HERITAGE OF THE DESTINATION to you? (Please rate in terms of importance to you in developing your business offering, 1 is not at all important, 5 is very important).
16. How important is THE NATURAL ENVIRONMENT to you? (Please rate in terms of importance to you in developing your business offering, 1 is not at all important, 5 is very important).
17. How important is THE NATURAL ENVIRONMENT to you? (Please rate in terms of importance to you in developing your business offering, 1 is not at all important, 5 is very important).
18. To what extent do you agree with the following statement (1 is do not agree at all, 5 is agree completely): **COLLABORATING WITH OTHER BUSINESSES IS VERY IMPORTANT TO ME**
19. To what extent do you agree with the following statement (1 is do not agree at all, 5 is agree completely): **INPUT INTO LOCAL FESTIVALS AND EVENTS IS VERY IMPORTANT TO ME**
20. To what extent do you agree with the following statement (1 is do not agree at all, 5 is agree completely): **PRESERVING OUR LOCAL LANGUAGE, HERITAGE AND CULTURE IS A KEY ASPECT OF OUR BUSINESS**
21. To what extent do you agree with the following statement (1 is do not agree at all, 5 is agree completely): **PRESERVING THE NATURAL ENVIRONMENT IS AN IMPORTANT VALUE OF OUR BUSINESS**
22. How important do you think sustainability is to your future business success? (1 is not at all important, 5 is very important)
23. Where would you rate yourself on the sustainable certification journey? (Please rate on a scale of 1 to 5 where 1 is not at all interested in certification and 5 is already in the process of certification)

## APPENDIX B LIST OF NACE CODES ELIGIBLE FOR ADMITTANCE TO PROGRAMME AS PER SECTION 6.1

[https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Statistical classification of economic activities in the European Community \(NACE\)](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Statistical_classification_of_economic_activities_in_the_European_Community_(NACE))

### Visitor Transportation

- H4932 – Taxi operation
- H4939 – Other passenger land transport n.e.c
- H5010 – Sea and coastal passenger water transport
- H5030 – Inland passenger water transport
- N7710 – Rental and leasing of cars and light motor vehicles

### Accommodation

- I5510 – Hotels and similar accommodation
- I5520 – Holiday and other short-stay accommodation
- I5530 – Camping grounds, recreational vehicle parks and trailer parks

### Food Service

- I5610 – Restaurants and mobile food service activities
- I5630 – Beverage serving activities

### Recreation Activities

- N7721 – Renting and leasing of recreational and sports goods
- R90 – Creative, arts and entertainment activities
- R91 – Libraries, archives, museums and other cultural activities
- R93 – Sports activities and amusement and recreation activities

## APPENDIX C – Data Collection

### Information Letter for open call to SMEs to participate in Circular Economy for Regenerative Tourism (CE4RT) Project

Information Letter

Dear \_\_\_\_\_,

Thank you for considering participation in this research. My name is Dr Sophie Price, lecturer at Munster Technological University and lead researcher on the Circular Economy for Regenerative Tourism (CE4RT) project. The CE4RT project is an EU funded trans-national collaborative project supporting a network of tourism SMEs across five partner European hubs in the areas of Sustainable Practice, the Circular Economy and Regenerative Tourism. This letter aims to inform you about this research, what it entails and how the resulting data will be used.

#### What is this research about?

The focus of the CE4RT project is to provide tourism SMEs with the tools to implement regenerative practices as a long-term strategy within their region and to contribute to the continued resilience, viability and competitiveness of the industry. 80 SMEs from across the network will be chosen to participate in this project and will be provided with a suite of knowledge and training based on the specific needs and the readiness stage in the sustainable journey. This will be achieved through a range of activities such as training seminars, mentoring, coaching, community events and familiarisation trips (for selected SMEs). A repository of knowledge will be created and disseminated on various platforms, not just to the participating tourism SMEs, but will be made available for all tourism practitioners throughout Europe as well as higher educational institutions. An innovative methodology will be employed involving the concept of 'Leaders and Learners' with 2 SME participants chosen from each participating jurisdiction to act as leaders within the community for the facilitation and implementation of regenerative tourism practice. Tourism stakeholders from across Europe will be invited to attend a virtual conference from which the outputs of this project can be shared.

#### Your Involvement

As a participating SME, you will be required to conduct a Self-Assessment Audit using provided resources at the start of the process. Based on this audit, you will be directed towards training modules that will empower your SME to communicate your tourism offering while also maintaining the ethos, culture and heritage of your destination. Access to training, workshops, mentoring, coaching, certification etc will be included as part of the project. Guided by your local project partner, a starting point, milestones and goals will be decided. Constant self-administered monitoring via an online platform will be required.

#### How will the data gathered be used?

As a requirement of the funding organisation, the names of participating SMEs will be published on the project website. Information/data will also be shared with the grant awarding body (European Innovation Council and SMEs Executive Agency - *EISMEA*) who may also publish general information accordingly.

The compendium of knowledge generated in CE4RT will be made available to a wider network of tourism SMEs; National Tourism Organisations; Certification training organisations; Further education institutions in the partner countries but also throughout the wider European network.

Results of this research will be disseminated via academic publications, conferences and workshops. In these publications, participants will be identified according to their business type and location (e.g. tour guide, Ireland). Data management procedures within this project will be in line with GDPR principles. All data generated as part of this project will be collected and stored appropriately.



This study has received research ethical approval from the MTU Human Research Ethics Committee (Approval No: **MTU-HREC-FER-22-014-A**, 20<sup>th</sup> March 2023).

**What next?**

Please read section 7 of the SME Call document (insert link to website with information).

Please let me know by return email if you wish to take part in this research. If this is the case you are required to sign the statements at the end of this letter. You will be contacted over the next few weeks to arrange a suitable time to progress. If you require any further information or have any concerns please do not hesitate to contact me by email [Sophie.price@mtu.ie](mailto:Sophie.price@mtu.ie)

\_\_\_\_\_

Dr Sophie Price.

Please tick the relevant box, sign below and return (this may be done using a digital signature, a scan of the signed form or returning by post).

|   | Yes | No |
|---|-----|----|
| I agree to participate in this research and agree to the terms of section 7 of the Call document as detailed above. |     |    |

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

