



**EUROPEAN COMMISSION**  
Directorate-General for Employment, Social Affairs and Inclusion  
EMPL.C – Working Conditions and Social Dialogue  
C.3 – Social Dialogue

## **GRANT AGREEMENT**

### **Project 101143366 — IncreMe-n-tal**

#### **PREAMBLE**

This **Agreement** ('the Agreement') is **between** the following parties:

**on the one part,**

the **European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and**

**on the other part,**

1. 'the coordinator':

**FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL)**, PIC 890855276, established in CORSO TRIESTE 36, ROMA 00198, Italy,

and the following other beneficiaries, if they sign their 'accession form' (see Annex 3 and Article 40):

2. **FONDAZIONE ADAPT (FOND\_ADAPT)**, PIC 941351245, established in VIA GARIBALDI 7, BERGAMO 24122, Italy,

3. **UNIVERSIDAD DE SANTIAGO DE COMPOSTELA (USC)**, PIC 999829635, established in COLEXIO DE SAN XEROME PRAZA DO OBRADOIRO S/N, SANTIAGO DE COMPOSTELA 15782, Spain,

4. **FEDERACION DE INDUSTRIA, CONSTRUCCION Y AGRO DE LA UNION GENERAL DE TRABAJADORES (UGT FICA)**, PIC 890682422, established in AVENIDA DE AMERICA 25, MADRID 28002, Spain,

5. **KATHOLIEKE UNIVERSITEIT LEUVEN (KU Leuven)**, PIC 999991334, established in OUDE MARKT 13, LEUVEN 3000, Belgium,

6. **VORMINGSCENTRUM RECHT EN PLICHT (VZW)**, PIC 890581057, established in KONING BOUDEWIJNSTRAAT 18, GENT 9000, Belgium,

7. **UNIVERZA V LJUBLJANI (UL)**, PIC 999923240, established in KONGRESNI TRG 12, LJUBLJANA 1000, Slovenia,

8. **SINDIKAT KOVINSKE IN ELEKTROINDUSTRIJE SLOVENIJE (SKEI)**, PIC 885950471, established in DALMATINOVA 4, LJUBLJANA 1000, Slovenia,

9. **HACETTEPE UNIVERSITESI (HACETTEPE\_UNI)**, PIC 999900930, established in HACETTEPE UNIVERSITESI BEYTEPE KAMPUSU REKTORLUK BINASI, CANKAYA ANKARA 06800, Türkiye,

10. **TURK METAL SENDIKASI (TMS)**, PIC 944440501, established in BESTEPE MAHALLESİ 4 4 SOKAK NO 3 SOGOTOZU YENILAHA, ANKARA 06510, Türkiye,

11. **DUBLIN CITY UNIVERSITY (DCU)**, PIC 999892588, established in Glasnevin, DUBLIN 9, Ireland,

12. **SERVICES, INDUSTRIAL, PROFESSIONAL AND TECHNICAL UNION (SIPTU)**, PIC 882028373, established in LIBERTY HALL EDEN QUAY, DUBLIN Dublin 1, Ireland,

13. **STREDOEUROPSKY INSTITUTE PRE VYSKUM PRACE (CELSI)**, PIC 997562066, established in ZVOLENSKA ULICA 29, BRATISLAVA RUZINOV 821 09, Slovakia,

Unless otherwise specified, references to ‘beneficiary’ or ‘beneficiaries’ include the coordinator and affiliated entities (if any).

If only one beneficiary signs the grant agreement (‘mono-beneficiary grant’), all provisions referring to the ‘coordinator’ or the ‘beneficiaries’ will be considered — mutatis mutandis — as referring to the beneficiary.

The parties referred to above have agreed to enter into the Agreement.

By signing the Agreement and the accession forms, the beneficiaries accept the grant and agree to implement the action under their own responsibility and in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

The Agreement is composed of:

Preamble

Terms and Conditions (including Data Sheet)

- Annex 1 Description of the action<sup>1</sup>
- Annex 2 Estimated budget for the action
- Annex 2a Additional information on unit costs and contributions (if applicable)
- Annex 3 Accession forms (if applicable)<sup>2</sup>
- Annex 3a Declaration on joint and several liability of affiliated entities (if applicable)<sup>3</sup>
- Annex 4 Model for the financial statements
- Annex 5 Specific rules (if applicable)

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<sup>1</sup> Template published on [Portal Reference Documents](#).

<sup>2</sup> Template published on [Portal Reference Documents](#).

<sup>3</sup> Template published on [Portal Reference Documents](#).

## **TERMS AND CONDITIONS**

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## DATA SHEET

### 1. General data

Project summary:

Project summary
<p>IncreMe(n)tal (Increasing Metalworkers' representatives' Awareness and Skills on Mental Health Protection &amp; Promotion in the Workplace) aims at providing quality training to trade unionists and workers' representatives in the metalworking industry in 7 target countries and at transnational level, in order to increase their awareness concerning emerging psychosocial risks connected to work environment and work organisation, but also regarding the strategic role of social dialogue and collective bargaining initiatives in protecting and promoting workers' mental health. This will be achieved through (1) the close cooperation between "research" BENs, experts, trade unions (TU) and APs and through the delivery of 22 training sessions (at national and transnational level), organised thematically, taking into account sectoral and national peculiarities but also the international context and practices in the field; (2) the implementation of communication and dissemination activities designed to fit in with other European and international initiatives and gatherings organised on the theme of risk prevention and mental health promotion in the workplace. IncreMe(n)tal consortium consists of the leading applicant FIM-CISL (IT), 6 Research beneficiaries (Fond. ADAPT (IT), DCU (IE), CELSI (SK), UL (SI), USC (ES), KU Leuven (BE), HACETTEPE (TR)), 6 trade union beneficiaries (VZW (BE), SIPTU (IE), SKEI (SI), UGT-FICA (ES), TMS (TR)), 2 associate organisations (IndustriAll Europe, OZ KOVO (SK)) and one affiliated entity (ADAPT (IT)).</p>

Keywords:

- Mental Health, Psychosocial risks, Occupational Health & Safety, Metalworking, Training, Collective Bargaining

Project number: 101143366

Project name: Increasing Metalworkers' representatives' Awareness and Skills on Mental Health Protection & Promotion in the Workplace

Project acronym: IncreMe-n-tal

Call: SOCPL-2023-INFO-WK

Topic: SOCPL-2023-INFO-WK

Type of action: SOCPL Project Grants

Granting authority: European Commission-EU

Grant managed through EU Funding & Tenders Portal: Yes (eGrants)

Project starting date: first day of the month following the entry into force date

Project end date: starting date + months of duration

Project duration: 24 months

Consortium agreement: Yes

### 2. Participants

List of participants:

N°	Role	Short name	Legal name	Ctry	PIC	Total eligible costs (BEN and AE)	Max grant amount
1	COO	FIM CISL	FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE	IT	890855276	91 978.27	82 780.00
2	BEN	FOND_ADAPT	FONDAZIONE ADAPT	IT	941351245	32 960.28	29 664.00
2.1	AE	ADAPT	ADAPT ASSOCIAZIONE PER GLI STUDI INTERNAZIONALI E COMPARATI SUL DIRITTO DEL LAVORO E SULLE RELAZIONI INDUSTRIALI	IT	986396881	11 458.63	10 312.00

N°	Role	Short name	Legal name	Ctry	PIC	Total eligible costs (BEN and AE)	Max grant amount
3	BEN	USC	UNIVERSIDAD DE SANTIAGO DE COMPOSTELA	ES	999829635	46 617.76	41 955.00
4	BEN	UGT FICA	FEDERACION DE INDUSTRIA, CONSTRUCCION Y AGRO DE LA UNION GENERAL DE TRABAJADORES	ES	890682422	28 832.22	25 949.00
5	BEN	KU Leuven	KATHOLIEKE UNIVERSITEIT LEUVEN	BE	999991334	66 761.58	60 085.00
6	BEN	VZW	VORMINGSCENTRUM RECHT EN PLICHT	BE	890581057	51 913.19	46 721.00
7	BEN	UL	UNIVERZA V LJUBLJANI	SI	999923240	47 857.89	43 072.00
8	BEN	SKEI	SINDIKAT KOVINSKE IN ELEKTROINDUSTRIJE SLOVENIJE	SI	885950471	26 136.89	23 523.00
9	BEN	HACETTEPE_UNI	HACETTEPE UNIVERSITESI	TR	999900930	29 431.42	26 488.00
10	BEN	TMS	TURK METAL SENDIKASI	TR	944440501	24 065.37	21 658.00
11	BEN	DCU	DUBLIN CITY UNIVERSITY	IE	999892588	60 685.05	54 616.00
12	BEN	SIPTU	SERVICES, INDUSTRIAL, PROFESSIONAL AND TECHNICAL UNION	IE	882028373	26 043.80	23 439.00
13	BEN	CELSI	STREDOEUROPSKY INSTITUT PRE VYSKUM PRACE	SK	997562066	36 652.85	32 987.00
14	AP	KOVO	Odborový zväz KOVO	SK	884934687	0.00	0.00
15	AP	IAE	INDUSTRIALL EUROPEAN TRADE UNION ASSOCIATION DE FAIT	BE	941799191	0.00	0.00
<b>Total</b>						581 395.20	523 249.00

**Coordinator:**

- FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL)

**3. Grant****Maximum grant amount, total estimated eligible costs and contributions and funding rate:**

Total eligible costs (BEN and AE)	Funding rate (%)	Maximum grant amount (Annex 2)	Maximum grant amount (award decision)
581 395.20	90	523 249.00	523 249.00

**Grant form:** Budget-based**Grant mode:** Action grant**Budget categories/activity types:**

- A. Personnel costs
  - A.1 Employees, A.2 Natural persons under direct contract, A.3 Seconded persons
  - A.4 SME owners and natural person beneficiaries
  - A.5 Volunteers
- B. Subcontracting costs
- C. Purchase costs
  - C.1 Travel and subsistence
  - C.2 Equipment
  - C.3 Other goods, works and services
- D. Other cost categories
  - D.1 Financial support to third parties

- E. Indirect costs

#### Cost eligibility options:

- Standard supplementary payments
- Limitation for subcontracting
- Travel and subsistence:
  - Travel: Unit or Actual costs
  - Accommodation: Unit or Actual costs
  - Subsistence: Unit or Actual costs
- Equipment: depreciation only
- Costs for providing financial support to third parties (actual cost; max amount for each recipient: EUR 0.00)
- Indirect cost flat-rate: 7% of the eligible direct costs (categories A-D, except volunteers costs and exempted specific cost categories, if any)
- VAT: Yes
- Other ineligible costs

**Budget flexibility:** Yes (no flexibility cap)

#### 4. Reporting, payments and recoveries

##### 4.1 Continuous reporting (art 21)

**Deliverables:** see Funding & Tenders Portal Continuous Reporting tool

##### 4.2 Periodic reporting and payments

**Reporting and payment schedule** (art 21, 22):

Reporting					Payments	
Reporting periods			Type	Deadline	Type	Deadline (time to pay)
RP No	Month from	Month to				
					Initial prefinancing	30 days from entry into force/ financial guarantee (if required) – whichever is the latest
1	1	12	Additional prefinancing report	60 days after end of reporting period	Additional prefinancing	60 days from receiving additional prefinancing report/ financial guarantee (if required) – whichever is the latest
2	13	24	Periodic report	60 days after end of reporting period	Final payment	90 days from receiving periodic report

**Prefinancing payments and guarantees:**

Prefinancing payment		Prefinancing guarantee		
Type	Amount	Guarantee amount	Division per participant	
Prefinancing 1 (initial)	209 299.60	n/a	1 - FIM CISL	n/a
			2 - FOND_ADAPT	n/a
			2.1 - ADAPT	n/a
			3 - USC	n/a
			4 - UGT FICA	n/a
			5 - KU Leuven	n/a
			6 - VZW	n/a
			7 - UL	n/a
			8 - SKEI	n/a
			9 - HACETTEPE_UNI	n/a
			10 - TMS	n/a
			11 - DCU	n/a
			12 - SIPTU	n/a
13 - CELSI	n/a			
Prefinancing 2 (additional)	209 299.60	n/a	1 - FIM CISL	n/a
			2 - FOND_ADAPT	n/a
			2.1 - ADAPT	n/a
			3 - USC	n/a
			4 - UGT FICA	n/a
			5 - KU Leuven	n/a
			6 - VZW	n/a
			7 - UL	n/a
			8 - SKEI	n/a
			9 - HACETTEPE_UNI	n/a
			10 - TMS	n/a
			11 - DCU	n/a
			12 - SIPTU	n/a
13 - CELSI	n/a			

**Reporting and payment modalities (art 21, 22):**

Mutual Insurance Mechanism (MIM): No

Restrictions on distribution of initial prefinancing: The prefinancing may be distributed only if the minimum number of beneficiaries set out in the call conditions (if any) have acceded to the Agreement and only to beneficiaries that have acceded.

Interim payment ceiling (if any): 90% of the maximum grant amount

No-profit rule: Yes

Late payment interest: ECB + 3.5%

Bank account for payments:

IT55I083270320000000025562 ROMAITRR

Conversion into euros: Double conversion

Reporting language: Language of the Agreement

#### **4.3 Certificates** (art 24):

Certificates on the financial statements (CFS):

Conditions:

Schedule: interim/final payment, if threshold is reached

Standard threshold (beneficiary-level):

- financial statement: requested EU contribution to costs # EUR 325 000.00

#### **4.4 Recoveries** (art 22)

##### **First-line liability for recoveries:**

Beneficiary termination: Beneficiary concerned

Final payment: Coordinator

After final payment: Beneficiary concerned

##### **Joint and several liability for enforced recoveries (in case of non-payment):**

Limited joint and several liability of other beneficiaries — up to the maximum grant amount of the beneficiary

Joint and several liability of affiliated entities — n/a

#### **5. Consequences of non-compliance, applicable law & dispute settlement forum**

##### **Applicable law** (art 43):

Standard applicable law regime: EU law + law of Belgium

##### **Dispute settlement forum** (art 43):

Standard dispute settlement forum:

EU beneficiaries: EU General Court + EU Court of Justice (on appeal)

Non-EU beneficiaries: Courts of Brussels, Belgium (unless an international agreement provides for the enforceability of EU court judgements)

#### **6. Other**

**Specific rules (Annex 5):** Yes

##### **Standard time-limits after project end:**

Confidentiality (for X years after final payment): 5

Record-keeping (for X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Reviews (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Audits (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Extension of findings from other grants to this grant (no later than X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

Impact evaluation (up to X years after final payment): 5 (or 3 for grants of not more than EUR 60 000)

## **CHAPTER 1 GENERAL**

### **ARTICLE 1 — SUBJECT OF THE AGREEMENT**

This Agreement sets out the rights and obligations and terms and conditions applicable to the grant awarded for the implementation of the action set out in Chapter 2.

### **ARTICLE 2 — DEFINITIONS**

For the purpose of this Agreement, the following definitions apply:

Actions — The project which is being funded in the context of this Agreement.

Grant — The grant awarded in the context of this Agreement.

EU grants — Grants awarded by EU institutions, bodies, offices or agencies (including EU executive agencies, EU regulatory agencies, EDA, joint undertakings, etc.).

Participants — Entities participating in the action as beneficiaries, affiliated entities, associated partners, third parties giving in-kind contributions, subcontractors or recipients of financial support to third parties.

Beneficiaries (BEN) — The signatories of this Agreement (either directly or through an accession form).

Affiliated entities (AE) — Entities affiliated to a beneficiary within the meaning of Article 187 of EU Financial Regulation 2018/1046<sup>4</sup> which participate in the action with similar rights and obligations as the beneficiaries (obligation to implement action tasks and right to charge costs and claim contributions).

Associated partners (AP) — Entities which participate in the action, but without the right to charge costs or claim contributions.

Purchases — Contracts for goods, works or services needed to carry out the action (e.g. equipment, consumables and supplies) but which are not part of the action tasks (see Annex 1).

Subcontracting — Contracts for goods, works or services that are part of the action tasks (see Annex 1).

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<sup>4</sup> For the definition, see Article 187 Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 ('EU Financial Regulation') (OJ L 193, 30.7.2018, p. 1): "**affiliated entities** [are]:

- (a) entities that form a sole beneficiary [(i.e. where an entity is formed of several entities that satisfy the criteria for being awarded a grant, including where the entity is specifically established for the purpose of implementing an action to be financed by a grant)];
- (b) entities that satisfy the eligibility criteria and that do not fall within one of the situations referred to in Article 136(1) and 141(1) and that have a link with the beneficiary, in particular a legal or capital link, which is neither limited to the action nor established for the sole purpose of its implementation".

**In-kind contributions** — In-kind contributions within the meaning of Article 2(36) of EU Financial Regulation 2018/1046, i.e. non-financial resources made available free of charge by third parties.

**Fraud** — Fraud within the meaning of Article 3 of EU Directive 2017/1371<sup>5</sup> and Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995<sup>6</sup>, as well as any other wrongful or criminal deception intended to result in financial or personal gain.

**Irregularities** — Any type of breach (regulatory or contractual) which could impact the EU financial interests, including irregularities within the meaning of Article 1(2) of EU Regulation 2988/95<sup>7</sup>.

**Grave professional misconduct** — Any type of unacceptable or improper behaviour in exercising one's profession, especially by employees, including grave professional misconduct within the meaning of Article 136(1)(c) of EU Financial Regulation 2018/1046.

**Applicable EU, international and national law** — Any legal acts or other (binding or non-binding) rules and guidance in the area concerned.

**Portal** — EU Funding & Tenders Portal; electronic portal and exchange system managed by the European Commission and used by itself and other EU institutions, bodies, offices or agencies for the management of their funding programmes (grants, procurements, prizes, etc.).

## **CHAPTER 2 ACTION**

### **ARTICLE 3 — ACTION**

The grant is awarded for the action **101143366 — IncreMe-n-tal** ('action'), as described in Annex 1.

### **ARTICLE 4 — DURATION AND STARTING DATE**

The duration and the starting date of the action are set out in the Data Sheet (see Point 1).

## **CHAPTER 3 GRANT**

### **ARTICLE 5 — GRANT**

#### **5.1 Form of grant**

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<sup>5</sup> Directive (EU) 2017/1371 of the European Parliament and of the Council of 5 July 2017 on the fight against fraud to the Union's financial interests by means of criminal law (OJ L 198, 28.7.2017, p. 29).

<sup>6</sup> OJ C 316, 27.11.1995, p. 48.

<sup>7</sup> Council Regulation (EC, Euratom) No 2988/95 of 18 December 1995 on the protection of the European Communities financial interests (OJ L 312, 23.12.1995, p. 1).



The grant is an action grant<sup>8</sup> which takes the form of a budget-based mixed actual cost grant (i.e. a grant based on actual costs incurred, but which may also include other forms of funding, such as unit costs or contributions, flat-rate costs or contributions, lump sum costs or contributions or financing not linked to costs).

## 5.2 Maximum grant amount

The maximum grant amount is set out in the Data Sheet (see Point 3) and in the estimated budget (Annex 2).

## 5.3 Funding rate

The funding rate for costs is 90% of the action's eligible costs.

Contributions are not subject to any funding rate.

## 5.4 Estimated budget, budget categories and forms of funding

The estimated budget for the action is set out in Annex 2.

It contains the estimated eligible costs and contributions for the action, broken down by participant and budget category.

Annex 2 also shows the types of costs and contributions (forms of funding)<sup>9</sup> to be used for each budget category.

If unit costs or contributions are used, the details on the calculation will be explained in Annex 2a.

## 5.5 Budget flexibility

The budget breakdown may be adjusted — without an amendment (see Article 39) — by transfers (between participants and budget categories), as long as this does not imply any substantive or important change to the description of the action in Annex 1.

However:

- changes to the budget category for volunteers (if used) always require an amendment
- changes to budget categories with lump sums costs or contributions (if used; including financing not linked to costs) always require an amendment
- changes to budget categories with higher funding rates or budget ceilings (if used) always require an amendment
- addition of amounts for subcontracts not provided for in Annex 1 either require an amendment or simplified approval in accordance with Article 6.2

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<sup>8</sup> For the definition, see Article 180(2)(a) EU Financial Regulation 2018/1046: ‘**action grant**’ means an EU grant to finance “an action intended to help achieve a Union policy objective”.

<sup>9</sup> See Article 125 EU Financial Regulation 2018/1046.

- other changes require an amendment or simplified approval, if specifically provided for in Article 6.2
- flexibility caps: not applicable.

## ARTICLE 6 — ELIGIBLE AND INELIGIBLE COSTS AND CONTRIBUTIONS

In order to be eligible, costs and contributions must meet the **eligibility** conditions set out in this Article.

### 6.1 General eligibility conditions

The **general eligibility conditions** are the following:

- (a) for actual costs:
  - (i) they must be actually incurred by the beneficiary
  - (ii) they must be incurred in the period set out in Article 4 (with the exception of costs relating to the submission of the final periodic report, which may be incurred afterwards; see Article 21)
  - (iii) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
  - (iv) they must be incurred in connection with the action as described in Annex 1 and necessary for its implementation
  - (v) they must be identifiable and verifiable, in particular recorded in the beneficiary's accounts in accordance with the accounting standards applicable in the country where the beneficiary is established and with the beneficiary's usual cost accounting practices
  - (vi) they must comply with the applicable national law on taxes, labour and social security and
  - (vii) they must be reasonable, justified and must comply with the principle of sound financial management, in particular regarding economy and efficiency
- (b) for unit costs or contributions (if any):
  - (i) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
  - (ii) the units must:
    - be actually used or produced by the beneficiary in the period set out in Article 4 (with the exception of units relating to the submission of the final periodic report, which may be used or produced afterwards; see Article 21)
    - be necessary for the implementation of the action and
  - (iii) the number of units must be identifiable and verifiable, in particular supported by records and documentation (see Article 20)

- (c) for flat-rate costs or contributions (if any):
- (i) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
  - (ii) the costs or contributions to which the flat-rate is applied must:
    - be eligible
    - relate to the period set out in Article 4 (with the exception of costs or contributions relating to the submission of the final periodic report, which may be incurred afterwards; see Article 21)
- (d) for lump sum costs or contributions (if any):
- (i) they must be declared under one of the budget categories set out in Article 6.2 and Annex 2
  - (ii) the work must be properly implemented by the beneficiary in accordance with Annex 1
  - (iii) the deliverables/outputs must be achieved in the period set out in Article 4 (with the exception of deliverables/outputs relating to the submission of the final periodic report, which may be achieved afterwards; see Article 21)
- (e) for unit, flat-rate or lump sum costs or contributions according to usual cost accounting practices (if any):
- (i) they must fulfil the general eligibility conditions for the type of cost concerned
  - (ii) the cost accounting practices must be applied in a consistent manner, based on objective criteria, regardless of the source of funding
- (f) for financing not linked to costs (if any): the results must be achieved or the conditions must be fulfilled as described in Annex 1.

In addition, for direct cost categories (e.g. personnel, travel & subsistence, subcontracting and other direct costs) only costs that are directly linked to the action implementation and can therefore be attributed to it directly are eligible. They must not include any indirect costs (i.e. costs that are only indirectly linked to the action, e.g. via cost drivers).

## 6.2 Specific eligibility conditions for each budget category

For each budget category, the **specific eligibility conditions** are as follows:

### **Direct costs**

#### **A. Personnel costs**

**A.1 Costs for employees (or equivalent)** are eligible as personnel costs if they fulfil the general eligibility conditions and are related to personnel working for the beneficiary under an employment contract (or equivalent appointing act) and assigned to the action.

They must be limited to salaries, social security contributions, taxes and other costs linked to the

remuneration, if they arise from national law or the employment contract (or equivalent appointing act) and be calculated on the basis of the costs actually incurred, in accordance with the following method:

{daily rate for the person  
multiplied by  
number of day-equivalents worked on the action (rounded up or down to the nearest half-day)}.

The daily rate must be calculated as:

{annual personnel costs for the person  
divided by  
215}.

The number of day-equivalents declared for a person must be identifiable and verifiable (see Article 20).

The total number of day-equivalents declared in EU grants, for a person for a year, cannot be higher than 215.

The personnel costs may also include supplementary payments for personnel assigned to the action (including payments on the basis of supplementary contracts regardless of their nature), if:

- it is part of the beneficiary's usual remuneration practices and is paid in a consistent manner whenever the same kind of work or expertise is required
- the criteria used to calculate the supplementary payments are objective and generally applied by the beneficiary, regardless of the source of funding used.

**A.2 and A.3 Costs for natural persons working under a direct contract** other than an employment contract and costs for **seconded persons by a third party against payment** are also eligible as personnel costs, if they are assigned to the action, fulfil the general eligibility conditions and:

- (a) work under conditions similar to those of an employee (in particular regarding the way the work is organised, the tasks that are performed and the premises where they are performed) and
- (b) the result of the work belongs to the beneficiary (unless agreed otherwise).

They must be calculated on the basis of a rate which corresponds to the costs actually incurred for the direct contract or secondment and must not be significantly different from those for personnel performing similar tasks under an employment contract with the beneficiary.

**A.4 The work of SME owners** for the action (i.e. owners of beneficiaries that are small and medium-sized enterprises<sup>10</sup> not receiving a salary) or **natural person beneficiaries** (i.e. beneficiaries that are

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<sup>10</sup> For the definition, see Commission Recommendation 2003/361/EC: micro, small or medium-sized enterprise (SME) are enterprises

- engaged in an economic activity, irrespective of their legal form (including, in particular, self-employed persons and family businesses engaged in craft or other activities, and partnerships or associations regularly engaged in an economic activity) and

natural persons not receiving a salary) may be declared as personnel costs, if they fulfil the general eligibility conditions and are calculated as unit costs in accordance with the method set out in Annex 2a.

**A.5** The work of **volunteers** for the action (i.e. persons who freely work for an organisation, on a non-compulsory basis and without being paid) may be declared as personnel costs, if and as declared eligible in the call conditions, if they fulfil the general eligibility conditions and are calculated as unit costs in accordance with the method set out in Annex 2a.

They:

- may not exceed the maximum amount for volunteers for the action (which corresponds to 50% of the total (ineligible and eligible) project costs and contributions estimated in the proposal)
- may not exceed the maximum amount for volunteers for each beneficiary set out in Annex 2
- may not make the maximum EU contribution to costs higher than the total eligible costs without volunteers.

If also indirect costs for volunteers are declared eligible in the call conditions, the amount of indirect costs may be added to the volunteers costs category in Annex 2, at the flat-rate set out in Point E.

## **B. Subcontracting costs**

**Subcontracting costs** for the action (including related duties, taxes and charges, such as non-deductible or non-refundable value added tax (VAT)) are eligible, if they are calculated on the basis of the costs actually incurred, fulfil the general eligibility conditions and are awarded using the beneficiary's usual purchasing practices — provided these ensure subcontracts with best value for money (or if appropriate the lowest price) and that there is no conflict of interests (see Article 12).

Beneficiaries that are 'contracting authorities/entities' within the meaning of the EU Directives on public procurement must also comply with the applicable national law on public procurement.

Subcontracting may cover only a limited part of the action.

The tasks to be subcontracted and the estimated cost for each subcontract must be set out in Annex 1 and the total estimated costs of subcontracting per beneficiary must be set out in Annex 2 (or may be approved ex post in the periodic report, if the use of subcontracting does not entail changes to the Agreement which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants; 'simplified approval procedure').

## **C. Purchase costs**

**Purchase costs** for the action (including related duties, taxes and charges, such as non-deductible or non-refundable value added tax (VAT)) are eligible if they fulfil the general eligibility conditions and are bought using the beneficiary's usual purchasing practices — provided these ensure purchases

- 
- employing fewer than 250 persons (expressed in 'annual working units' as defined in Article 5 of the Recommendation) and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.

with best value for money (or if appropriate the lowest price) and that there is no conflict of interests (see Article 12).

Beneficiaries that are ‘contracting authorities/entities’ within the meaning of the EU Directives on public procurement must also comply with the applicable national law on public procurement.

### C.1 Travel and subsistence

Purchases for **travel, accommodation and subsistence** must be calculated as follows:

- travel: as unit costs in accordance with the method set out in Annex 2a if covered by Decision C(2021)35<sup>11</sup> or otherwise as costs actually incurred and in line with the beneficiary’s usual practices on travel
- accommodation: as unit costs in accordance with the method set out in Annex 2a if covered by Decision C(2021)35<sup>12</sup> or otherwise as costs actually incurred and in line with the beneficiary’s usual practices on travel
- subsistence: as unit costs in accordance with the method set out in Annex 2a if covered by Decision C(2021)35<sup>13</sup> or otherwise as costs actually incurred and in line with the beneficiary’s usual practices on travel.

### C.2 Equipment

Purchases of **equipment, infrastructure or other assets** used for the action must be declared as depreciation costs, calculated on the basis of the costs actually incurred and written off in accordance with international accounting standards and the beneficiary’s usual accounting practices.

Only the portion of the costs that corresponds to the rate of actual use for the action during the action duration can be taken into account.

Costs for **renting or leasing** equipment, infrastructure or other assets are also eligible, if they do not exceed the depreciation costs of similar equipment, infrastructure or assets and do not include any financing fees.

### C.3 Other goods, works and services

Purchases of **other goods, works and services** must be calculated on the basis of the costs actually incurred.

Such goods, works and services include, for instance, consumables and supplies, promotion, dissemination, protection of results, translations, publications, certificates and financial guarantees, if required under the Agreement.

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<sup>11</sup> Commission Decision of 12 January 2021 authorising the use of unit costs for travel, accommodation and subsistence costs under an action or work programme under the 2021-2027 multi-annual financial framework (C(2021)35).

<sup>12</sup> Commission Decision of 12 January 2021 authorising the use of unit costs for travel, accommodation and subsistence costs under an action or work programme under the 2021-2027 multi-annual financial framework (C(2021)35).

<sup>13</sup> Commission Decision of 12 January 2021 authorising the use of unit costs for travel, accommodation and subsistence costs under an action or work programme under the 2021-2027 multi-annual financial framework (C(2021)35).

## D. Other cost categories

### D.1 Financial support to third parties

**Costs for providing financial support to third parties** (in the form of **grants, prizes** or similar forms of support; if any) are eligible, if and as declared eligible in the call conditions, if they fulfil the general eligibility conditions, are calculated on the basis of the costs actually incurred and the support is implemented in accordance with the conditions set out in Annex 1.

These conditions must ensure objective and transparent selection procedures and include at least the following:

- (a) for grants (or similar):
  - (i) the maximum amount of financial support for each third party ('recipient'); this amount may not exceed the amount set out in the Data Sheet (see Point 3) or otherwise agreed with the granting authority
  - (ii) the criteria for calculating the exact amount of the financial support
  - (iii) the different types of activity that qualify for financial support, on the basis of a closed list
  - (iv) the persons or categories of persons that will be supported and
  - (v) the criteria and procedures for giving financial support
- (b) for prizes (or similar):
  - (i) the eligibility and award criteria
  - (ii) the amount of the prize and
  - (iii) the payment arrangements.

### **Indirect costs**

## E. Indirect costs

**Indirect costs** will be reimbursed at the flat-rate of 7% of the eligible direct costs (categories A-D, except volunteers costs and exempted specific cost categories, if any).

### **Contributions**

Not applicable

## 6.3 Ineligible costs and contributions

The following costs or contributions are **ineligible**:

- (a) costs or contributions that do not comply with the conditions set out above (Article 6.1 and 6.2), in particular:
  - (i) costs related to return on capital and dividends paid by a beneficiary

- (ii) debt and debt service charges
  - (iii) provisions for future losses or debts
  - (iv) interest owed
  - (v) currency exchange losses
  - (vi) bank costs charged by the beneficiary's bank for transfers from the granting authority
  - (vii) excessive or reckless expenditure
  - (viii) deductible or refundable VAT (including VAT paid by public bodies acting as public authority)
  - (ix) costs incurred or contributions for activities implemented during grant agreement suspension (see Article 31)
  - (x) in-kind contributions by third parties
- (b) costs or contributions declared under other EU grants (or grants awarded by an EU Member State, non-EU country or other body implementing the EU budget), except for the following cases:
- (i) Synergy actions: not applicable
  - (ii) if the action grant is combined with an operating grant<sup>14</sup> running during the same period and the beneficiary can demonstrate that the operating grant does not cover any (direct or indirect) costs of the action grant
- (c) costs or contributions for staff of a national (or regional/local) administration, for activities that are part of the administration's normal activities (i.e. not undertaken only because of the grant)
- (d) costs or contributions (especially travel and subsistence) for staff or representatives of EU institutions, bodies or agencies
- (e) other :
- (i) country restrictions for eligible costs: not applicable
  - (ii) costs or contributions declared specifically ineligible in the call conditions.

#### 6.4 Consequences of non-compliance

If a beneficiary declares costs or contributions that are ineligible, they will be rejected (see Article 27).

This may also lead to other measures described in Chapter 5.

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<sup>14</sup> For the definition, see Article 180(2)(b) of EU Financial Regulation 2018/1046: '**operating grant**' means an EU grant to finance "the functioning of a body which has an objective forming part of and supporting an EU policy".



## **CHAPTER 4 GRANT IMPLEMENTATION**

### **SECTION 1 CONSORTIUM: BENEFICIARIES, AFFILIATED ENTITIES AND OTHER PARTICIPANTS**

#### **ARTICLE 7 — BENEFICIARIES**

The beneficiaries, as signatories of the Agreement, are fully responsible towards the granting authority for implementing it and for complying with all its obligations.

They must implement the Agreement to their best abilities, in good faith and in accordance with all the obligations and terms and conditions it sets out.

They must have the appropriate resources to implement the action and implement the action under their own responsibility and in accordance with Article 11. If they rely on affiliated entities or other participants (see Articles 8 and 9), they retain sole responsibility towards the granting authority and the other beneficiaries.

They are jointly responsible for the *technical* implementation of the action. If one of the beneficiaries fails to implement their part of the action, the other beneficiaries must ensure that this part is implemented by someone else (without being entitled to an increase of the maximum grant amount and subject to an amendment; see Article 39). The *financial* responsibility of each beneficiary in case of recoveries is governed by Article 22.

The beneficiaries (and their action) must remain eligible under the EU programme funding the grant for the entire duration of the action. Costs and contributions will be eligible only as long as the beneficiary and the action are eligible.

The **internal roles and responsibilities** of the beneficiaries are divided as follows:

(a) Each beneficiary must:

- (i) keep information stored in the Portal Participant Register up to date (see Article 19)
- (ii) inform the granting authority (and the other beneficiaries) immediately of any events or circumstances likely to affect significantly or delay the implementation of the action (see Article 19)
- (iii) submit to the coordinator in good time:
  - the prefinancing guarantees (if required; see Article 23)
  - the financial statements and certificates on the financial statements (CFS) (if required; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
  - the contribution to the deliverables and technical reports (see Article 21)
  - any other documents or information required by the granting authority under the Agreement
- (iv) submit via the Portal data and information related to the participation of their affiliated entities.

(b) The coordinator must:

- (i) monitor that the action is implemented properly (see Article 11)
- (ii) act as the intermediary for all communications between the consortium and the granting authority, unless the Agreement or granting authority specifies otherwise, and in particular:
  - submit the prefinancing guarantees to the granting authority (if any)
  - request and review any documents or information required and verify their quality and completeness before passing them on to the granting authority
  - submit the deliverables and reports to the granting authority
  - inform the granting authority about the payments made to the other beneficiaries (report on the distribution of payments; if required, see Articles 22 and 32)
- (iii) distribute the payments received from the granting authority to the other beneficiaries without unjustified delay (see Article 22).

The coordinator may not delegate or subcontract the above-mentioned tasks to any other beneficiary or third party (including affiliated entities).

However, coordinators which are public bodies may delegate the tasks set out in Point (b)(ii) last indent and (iii) above to entities with ‘authorisation to administer’ which they have created or which are controlled by or affiliated to them. In this case, the coordinator retains sole responsibility for the payments and for compliance with the obligations under the Agreement.

Moreover, coordinators which are ‘sole beneficiaries’<sup>15</sup> (or similar, such as European research infrastructure consortia (ERICs)) may delegate the tasks set out in Point (b)(i) to (iii) above to one of their members. The coordinator retains sole responsibility for compliance with the obligations under the Agreement.

The beneficiaries must have **internal arrangements** regarding their operation and co-ordination, to ensure that the action is implemented properly.

If required by the granting authority (see Data Sheet, Point 1), these arrangements must be set out in a written **consortium agreement** between the beneficiaries, covering for instance:

- the internal organisation of the consortium
- the management of access to the Portal
- different distribution keys for the payments and financial responsibilities in case of recoveries (if any)
- additional rules on rights and obligations related to background and results (see Article 16)

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<sup>15</sup> For the definition, see Article 187(2) EU Financial Regulation 2018/1046: “Where several entities satisfy the criteria for being awarded a grant and together form one entity, that entity may be treated as the **sole beneficiary**, including where it is specifically established for the purpose of implementing the action financed by the grant.”

- settlement of internal disputes
- liability, indemnification and confidentiality arrangements between the beneficiaries.

The internal arrangements must not contain any provision contrary to this Agreement.

## **ARTICLE 8 — AFFILIATED ENTITIES**

The following entities which are linked to a beneficiary will participate in the action as ‘affiliated entities’:

- **ADAPT ASSOCIAZIONE PER GLI STUDI INTERNAZIONALI E COMPARATI SUL DIRITTO DEL LAVORO E SULLE RELAZIONI INDUSTRIALI (ADAPT)**, PIC 986396881, linked to FONDAZIONE ADAPT (FOND\_ADAPT)

Affiliated entities can charge costs and contributions to the action under the same conditions as the beneficiaries and must implement the action tasks attributed to them in Annex 1 in accordance with Article 11.

Their costs and contributions will be included in Annex 2 and will be taken into account for the calculation of the grant.

The beneficiaries must ensure that all their obligations under this Agreement also apply to their affiliated entities.

The beneficiaries must ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the affiliated entities.

Breaches by affiliated entities will be handled in the same manner as breaches by beneficiaries. Recovery of undue amounts will be handled through the beneficiaries.

If the granting authority requires joint and several liability of affiliated entities (see Data Sheet, Point 4.4), they must sign the declaration set out in Annex 3a and may be held liable in case of enforced recoveries against their beneficiaries (see Article 22.2 and 22.4).

## **ARTICLE 9 — OTHER PARTICIPANTS INVOLVED IN THE ACTION**

### **9.1 Associated partners**

The following entities which cooperate with a beneficiary will participate in the action as ‘associated partners’:

- **Odborový zväz KOVO (KOVO)**, PIC 884934687
- **INDUSTRIALL EUROPEAN TRADE UNION ASSOCIATION DE FAIT (IAE)**, PIC 941799191

Associated partners must implement the action tasks attributed to them in Annex 1 in accordance with Article 11. They may not charge costs or contributions to the action and the costs for their tasks are not eligible.

The tasks must be set out in Annex 1.

The beneficiaries must ensure that their contractual obligations under Articles 11 (proper implementation), 12 (conflict of interests), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping) also apply to the associated partners.

The beneficiaries must ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the associated partners.

## **9.2 Third parties giving in-kind contributions to the action**

Other third parties may give in-kind contributions to the action (i.e. personnel, equipment, other goods, works and services, etc. which are free-of-charge), if necessary for the implementation.

Third parties giving in-kind contributions do not implement any action tasks. They may not charge costs or contributions to the action and the costs for the in-kind contributions are not eligible.

The third parties and their in-kind contributions should be set out in Annex 1.

## **9.3 Subcontractors**

Subcontractors may participate in the action, if necessary for the implementation.

Subcontractors must implement their action tasks in accordance with Article 11. The costs for the subcontracted tasks (invoiced price from the subcontractor) are eligible and may be charged by the beneficiaries, under the conditions set out in Article 6. The costs will be included in Annex 2 as part of the beneficiaries' costs.

The beneficiaries must ensure that their contractual obligations under Articles 11 (proper implementation), 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping) also apply to the subcontractors.

The beneficiaries must ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the subcontractors.

## **9.4 Recipients of financial support to third parties**

If the action includes providing financial support to third parties (e.g. grants, prizes or similar forms of support), the beneficiaries must ensure that their contractual obligations under Articles 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping) also apply to the third parties receiving the support (recipients).

The beneficiaries must also ensure that the bodies mentioned in Article 25 (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.) can exercise their rights also towards the recipients.

# **ARTICLE 10 — PARTICIPANTS WITH SPECIAL STATUS**

## **10.1 Non-EU participants**

Participants which are established in a non-EU country (if any) undertake to comply with their obligations under the Agreement and:

- to respect general principles (including fundamental rights, values and ethical principles, environmental and labour standards, rules on classified information, intellectual property rights, visibility of funding and protection of personal data)
- for the submission of certificates under Article 24: to use qualified external auditors which are independent and comply with comparable standards as those set out in EU Directive 2006/43/EC<sup>16</sup>
- for the controls under Article 25: to allow for checks, reviews, audits and investigations (including on-the-spot checks, visits and inspections) by the bodies mentioned in that Article (e.g. granting authority, OLAF, Court of Auditors (ECA), etc.).

Special rules on dispute settlement apply (see Data Sheet, Point 5).

## 10.2 Participants which are international organisations

Participants which are international organisations (IOs; if any) undertake to comply with their obligations under the Agreement and:

- to respect general principles (including fundamental rights, values and ethical principles, environmental and labour standards, rules on classified information, intellectual property rights, visibility of funding and protection of personal data)
- for the submission of certificates under Article 24: to use either independent public officers or external auditors which comply with comparable standards as those set out in EU Directive 2006/43/EC
- for the controls under Article 25: to allow for the checks, reviews, audits and investigations by the bodies mentioned in that Article, taking into account the specific agreements concluded by them and the EU (if any).

For such participants, nothing in the Agreement will be interpreted as a waiver of their privileges or immunities, as accorded by their constituent documents or international law.

Special rules on applicable law and dispute settlement apply (see Article 43 and Data Sheet, Point 5).

## 10.3 Pillar-assessed participants

Pillar-assessed participants (if any) may rely on their own systems, rules and procedures, in so far as they have been positively assessed and do not call into question the decision awarding the grant or breach the principle of equal treatment of applicants or beneficiaries.

‘Pillar-assessment’ means a review by the European Commission on the systems, rules and procedures which participants use for managing EU grants (in particular internal control system, accounting system, external audits, financing of third parties, rules on recovery and exclusion, information on recipients and protection of personal data; see Article 154 EU Financial Regulation 2018/1046).

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<sup>16</sup> Directive 2006/43/EC of the European Parliament and of the Council of 17 May 2006 on statutory audits of annual accounts and consolidated accounts or similar national regulations (OJ L 157, 9.6.2006, p. 87).

Participants with a positive pillar assessment may rely on their own systems, rules and procedures, in particular for:

- record-keeping (Article 20): may be done in accordance with internal standards, rules and procedures
- currency conversion for financial statements (Article 21): may be done in accordance with usual accounting practices
- guarantees (Article 23): for public law bodies, prefinancing guarantees are not needed
- certificates (Article 24):
  - certificates on the financial statements (CFS): may be provided by their regular internal or external auditors and in accordance with their internal financial regulations and procedures
  - certificates on usual accounting practices (CoMUC): are not needed if those practices are covered by an ex-ante assessment

and use the following specific rules, for:

- recoveries (Article 22): in case of financial support to third parties, there will be no recovery if the participant has done everything possible to retrieve the undue amounts from the third party receiving the support (including legal proceedings) and non-recovery is not due to an error or negligence on its part
- checks, reviews, audits and investigations by the EU (Article 25): will be conducted taking into account the rules and procedures specifically agreed between them and the framework agreement (if any)
- impact evaluation (Article 26): will be conducted in accordance with the participant's internal rules and procedures and the framework agreement (if any)
- grant agreement suspension (Article 31): certain costs incurred during grant suspension are eligible (notably, minimum costs necessary for a possible resumption of the action and costs relating to contracts which were entered into before the pre-information letter was received and which could not reasonably be suspended, reallocated or terminated on legal grounds)
- grant agreement termination (Article 32): the final grant amount and final payment will be calculated taking into account also costs relating to contracts due for execution only after termination takes effect, if the contract was entered into before the pre-information letter was received and could not reasonably be terminated on legal grounds
- liability for damages (Article 33.2): the granting authority must be compensated for damage it sustains as a result of the implementation of the action or because the action was not implemented in full compliance with the Agreement only if the damage is due to an infringement of the participant's internal rules and procedures or due to a violation of third parties' rights by the participant or one of its employees or individual for whom the employees are responsible.

Participants whose pillar assessment covers procurement and granting procedures may also do

purchases, subcontracting and financial support to third parties (Article 6.2) in accordance with their internal rules and procedures for purchases, subcontracting and financial support.

Participants whose pillar assessment covers data protection rules may rely on their internal standards, rules and procedures for data protection (Article 15).

The participants may however not rely on provisions which would breach the principle of equal treatment of applicants or beneficiaries or call into question the decision awarding the grant, such as in particular:

- eligibility (Article 6)
- consortium roles and set-up (Articles 7-9)
- security and ethics (Articles 13, 14)
- IPR (including background and results, access rights and rights of use), communication, dissemination and visibility (Articles 16 and 17)
- information obligation (Article 19)
- payment, reporting and amendments (Articles 21, 22 and 39)
- rejections, reductions, suspensions and terminations (Articles 27, 28, 29-32)

If the pillar assessment was subject to remedial measures, reliance on the internal systems, rules and procedures is subject to compliance with those remedial measures.

Participants whose assessment has not yet been updated to cover (the new rules on) data protection may rely on their internal systems, rules and procedures, provided that they ensure that personal data is:

- processed lawfully, fairly and in a transparent manner in relation to the data subject
- collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
- adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed
- accurate and, where necessary, kept up to date
- kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the data is processed and
- processed in a manner that ensures appropriate security of the personal data.

Participants must inform the coordinator without delay of any changes to the systems, rules and procedures that were part of the pillar assessment. The coordinator must immediately inform the granting authority.

Pillar-assessed participants that have also concluded a framework agreement with the EU, may moreover — under the same conditions as those above (i.e. not call into question the decision awarding

the grant or breach the principle of equal treatment of applicants or beneficiaries) — rely on the provisions set out in that framework agreement.

## **SECTION 2 RULES FOR CARRYING OUT THE ACTION**

### **ARTICLE 11 — PROPER IMPLEMENTATION OF THE ACTION**

#### **11.1 Obligation to properly implement the action**

The beneficiaries must implement the action as described in Annex 1 and in compliance with the provisions of the Agreement, the call conditions and all legal obligations under applicable EU, international and national law.

#### **11.2 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

### **ARTICLE 12 — CONFLICT OF INTERESTS**

#### **12.1 Conflict of interests**

The beneficiaries must take all measures to prevent any situation where the impartial and objective implementation of the Agreement could be compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other direct or indirect interest ('conflict of interests').

They must formally notify the granting authority without delay of any situation constituting or likely to lead to a conflict of interests and immediately take all the necessary steps to rectify this situation.

The granting authority may verify that the measures taken are appropriate and may require additional measures to be taken by a specified deadline.

#### **12.2 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28) and the grant or the beneficiary may be terminated (see Article 32).

Such breaches may also lead to other measures described in Chapter 5.

### **ARTICLE 13 — CONFIDENTIALITY AND SECURITY**

#### **13.1 Sensitive information**

The parties must keep confidential any data, documents or other material (in any form) that is identified as sensitive in writing ('sensitive information') — during the implementation of the action and for at least until the time-limit set out in the Data Sheet (see Point 6).



If a beneficiary requests, the granting authority may agree to keep such information confidential for a longer period.

Unless otherwise agreed between the parties, they may use sensitive information only to implement the Agreement.

The beneficiaries may disclose sensitive information to their personnel or other participants involved in the action only if they:

- (a) need to know it in order to implement the Agreement and
- (b) are bound by an obligation of confidentiality.

The granting authority may disclose sensitive information to its staff and to other EU institutions and bodies.

It may moreover disclose sensitive information to third parties, if:

- (a) this is necessary to implement the Agreement or safeguard the EU financial interests and
- (b) the recipients of the information are bound by an obligation of confidentiality.

The confidentiality obligations no longer apply if:

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

Specific confidentiality rules (if any) are set out in Annex 5.

### **13.2 Classified information**

The parties must handle classified information in accordance with the applicable EU, international or national law on classified information (in particular, Decision 2015/444<sup>17</sup> and its implementing rules).

Deliverables which contain classified information must be submitted according to special procedures agreed with the granting authority.

Action tasks involving classified information may be subcontracted only after explicit approval (in writing) from the granting authority.

Classified information may not be disclosed to any third party (including participants involved in the action implementation) without prior explicit written approval from the granting authority.

Specific security rules (if any) are set out in Annex 5.

### **13.3 Consequences of non-compliance**

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<sup>17</sup> Commission Decision 2015/444/EC, Euratom of 13 March 2015 on the security rules for protecting EU classified information (OJ L 72, 17.3.2015, p. 53).

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## **ARTICLE 14 — ETHICS AND VALUES**

### **14.1 Ethics**

The action must be carried out in line with the highest ethical standards and the applicable EU, international and national law on ethical principles.

Specific ethics rules (if any) are set out in Annex 5.

### **14.2 Values**

The beneficiaries must commit to and ensure the respect of basic EU values (such as respect for human dignity, freedom, democracy, equality, the rule of law and human rights, including the rights of minorities).

Specific rules on values (if any) are set out in Annex 5.

### **14.3 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## **ARTICLE 15 — DATA PROTECTION**

### **15.1 Data processing by the granting authority**

Any personal data under the Agreement will be processed under the responsibility of the data controller of the granting authority in accordance with and for the purposes set out in the Portal Privacy Statement.

For grants where the granting authority is the European Commission, an EU regulatory or executive agency, joint undertaking or other EU body, the processing will be subject to Regulation 2018/1725<sup>18</sup>.

### **15.2 Data processing by the beneficiaries**

The beneficiaries must process personal data under the Agreement in compliance with the applicable EU, international and national law on data protection (in particular, Regulation 2016/679<sup>19</sup>).

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<sup>18</sup> Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC (OJ L 295, 21.11.2018, p. 39).

<sup>19</sup> Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC ('GDPR') (OJ L 119, 4.5.2016, p. 1).

They must ensure that personal data is:

- processed lawfully, fairly and in a transparent manner in relation to the data subjects
- collected for specified, explicit and legitimate purposes and not further processed in a manner that is incompatible with those purposes
- adequate, relevant and limited to what is necessary in relation to the purposes for which they are processed
- accurate and, where necessary, kept up to date
- kept in a form which permits identification of data subjects for no longer than is necessary for the purposes for which the data is processed and
- processed in a manner that ensures appropriate security of the data.

The beneficiaries may grant their personnel access to personal data only if it is strictly necessary for implementing, managing and monitoring the Agreement. The beneficiaries must ensure that the personnel is under a confidentiality obligation.

The beneficiaries must inform the persons whose data are transferred to the granting authority and provide them with the Portal Privacy Statement.

### **15.3 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## **ARTICLE 16 — INTELLECTUAL PROPERTY RIGHTS (IPR) — BACKGROUND AND RESULTS — ACCESS RIGHTS AND RIGHTS OF USE**

### **16.1 Background and access rights to background**

The beneficiaries must give each other and the other participants access to the background identified as needed for implementing the action, subject to any specific rules in Annex 5.

‘Background’ means any data, know-how or information — whatever its form or nature (tangible or intangible), including any rights such as intellectual property rights — that is:

- (a) held by the beneficiaries before they acceded to the Agreement and
- (b) needed to implement the action or exploit the results.

If background is subject to rights of a third party, the beneficiary concerned must ensure that it is able to comply with its obligations under the Agreement.

### **16.2 Ownership of results**

The granting authority does not obtain ownership of the results produced under the action.

‘Results’ means any tangible or intangible effect of the action, such as data, know-how or information, whatever its form or nature, whether or not it can be protected, as well as any rights attached to it, including intellectual property rights.

### **16.3 Rights of use of the granting authority on materials, documents and information received for policy, information, communication, dissemination and publicity purposes**

The granting authority has the right to use non-sensitive information relating to the action and materials and documents received from the beneficiaries (notably summaries for publication, deliverables, as well as any other material, such as pictures or audio-visual material, in paper or electronic form) for policy, information, communication, dissemination and publicity purposes — during the action or afterwards.

The right to use the beneficiaries’ materials, documents and information is granted in the form of a royalty-free, non-exclusive and irrevocable licence, which includes the following rights:

- (a) **use for its own purposes** (in particular, making them available to persons working for the granting authority or any other EU service (including institutions, bodies, offices, agencies, etc.) or EU Member State institution or body; copying or reproducing them in whole or in part, in unlimited numbers; and communication through press information services)
- (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** (including shortening, summarising, inserting other elements (e.g. 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) **storage** in paper, electronic or other form
- (f) **archiving**, in line with applicable document-management rules
- (g) the right to authorise **third parties** to act on its behalf or sub-license to third parties the modes of use set out in Points (b), (c), (d) and (f), if needed for the information, communication and publicity activity of the granting authority
- (h) **processing**, analysing, aggregating the materials, documents and information received and **producing derivative works**.

The rights of use are granted for the whole duration of the industrial or intellectual property rights concerned.

If materials or documents are subject to moral rights or third party rights (including intellectual property rights or rights of natural persons on their image and voice), the beneficiaries must ensure that they comply with their obligations under this Agreement (in particular, by obtaining the necessary licences and authorisations from the rights holders concerned).

Where applicable, the granting authority will insert the following information:

“© – [year] – [name of the copyright owner]. All rights reserved. Licensed to the [name of granting authority] under conditions.”

#### **16.4 Specific rules on IPR, results and background**

Specific rules regarding intellectual property rights, results and background (if any) are set out in Annex 5.

#### **16.5 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such a breach may also lead to other measures described in Chapter 5.

### **ARTICLE 17 — COMMUNICATION, DISSEMINATION AND VISIBILITY**

#### **17.1 Communication — Dissemination — Promoting the action**

Unless otherwise agreed with the granting authority, the beneficiaries must promote the action and its results by providing targeted information to multiple audiences (including the media and the public), in accordance with Annex 1 and in a strategic, coherent and effective manner.

Before engaging in a communication or dissemination activity expected to have a major media impact, the beneficiaries must inform the granting authority.

#### **17.2 Visibility — European flag and funding statement**

Unless otherwise agreed with the granting authority, communication activities of the beneficiaries related to the action (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major result funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement (translated into local languages, where appropriate):



Funded by the  
European Union



Co-funded by the  
European Union



Funded by the  
European Union



Co-funded by the  
European Union

The emblem must remain distinct and separate and cannot be modified by adding other visual marks, brands or text.

Apart from the emblem, no other visual identity or logo may be used to highlight the EU support.

When displayed in association with other logos (e.g. of beneficiaries or sponsors), the emblem must be displayed at least as prominently and visibly as the other logos.

For the purposes of their obligations under this Article, the beneficiaries may use the emblem without first obtaining approval from the granting authority. This does not, however, give them the right to exclusive use. Moreover, they may not appropriate the emblem or any similar trademark or logo, either by registration or by any other means.

### **17.3 Quality of information — Disclaimer**

Any communication or dissemination activity related to the action must use factually accurate information.

Moreover, it must indicate the following disclaimer (translated into local languages where appropriate):

“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 [name of the granting authority]. Neither the European Union nor the granting authority can be held responsible for them.”

### **17.4 Specific communication, dissemination and visibility rules**

Specific communication, dissemination and visibility rules (if any) are set out in Annex 5.

### **17.5 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## **ARTICLE 18 — SPECIFIC RULES FOR CARRYING OUT THE ACTION**

### **18.1 Specific rules for carrying out the action**

Specific rules for implementing the action (if any) are set out in Annex 5.

### **18.2 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such a breach may also lead to other measures described in Chapter 5.

## **SECTION 3 GRANT ADMINISTRATION**

### **ARTICLE 19 — GENERAL INFORMATION OBLIGATIONS**

#### **19.1 Information requests**

The beneficiaries must provide — during the action or afterwards and in accordance with Article 7 — any information requested in order to verify eligibility of the costs or contributions declared, proper implementation of the action and compliance with the other obligations under the Agreement.

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

#### **19.2 Participant Register data updates**

The beneficiaries must keep — at all times, during the action or afterwards — their information stored in the Portal Participant Register up to date, in particular, their name, address, legal representatives, legal form and organisation type.

#### **19.3 Information about events and circumstances which impact the action**

The beneficiaries must immediately inform the granting authority (and the other beneficiaries) of any of the following:

- (a) **events** which are likely to affect or delay the implementation of the action or affect the EU's financial interests, in particular:
  - (i) changes in their legal, financial, technical, organisational or ownership situation (including changes linked to one of the exclusion grounds listed in the declaration of honour signed before grant signature)
  - (ii) linked action information: not applicable
- (b) **circumstances** affecting:
  - (i) the decision to award the grant or
  - (ii) compliance with requirements under the Agreement.

#### **19.4 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## ARTICLE 20 — RECORD-KEEPING

### 20.1 Keeping records and supporting documents

The beneficiaries must — at least until the time-limit set out in the Data Sheet (see Point 6) — keep records and other supporting documents to prove the proper implementation of the action in line with the accepted standards in the respective field (if any).

In addition, the beneficiaries must — for the same period — keep the following to justify the amounts declared:

- (a) for actual costs: adequate records and supporting documents to prove the costs declared (such as contracts, subcontracts, invoices and accounting records); in addition, the beneficiaries' usual accounting and internal control procedures must enable direct reconciliation between the amounts declared, the amounts recorded in their accounts and the amounts stated in the supporting documents
- (b) for flat-rate costs and contributions (if any): adequate records and supporting documents to prove the eligibility of the costs or contributions to which the flat-rate is applied
- (c) for the following simplified costs and contributions: the beneficiaries do not need to keep specific records on the actual costs incurred, but must keep:
  - (i) for unit costs and contributions (if any): adequate records and supporting documents to prove the number of units declared
  - (ii) for lump sum costs and contributions (if any): adequate records and supporting documents to prove proper implementation of the work as described in Annex 1
  - (iii) for financing not linked to costs (if any): adequate records and supporting documents to prove the achievement of the results or the fulfilment of the conditions as described in Annex 1
- (d) for unit, flat-rate and lump sum costs and contributions according to usual cost accounting practices (if any): the beneficiaries must keep any adequate records and supporting documents to prove that their cost accounting practices have been applied in a consistent manner, based on objective criteria, regardless of the source of funding, and that they comply with the eligibility conditions set out in Articles 6.1 and 6.2.

Moreover, the following is needed for specific budget categories:

- (e) for personnel costs: time worked for the beneficiary under the action must be supported by declarations signed monthly by the person and their supervisor, unless another reliable time-record system is in place; the granting authority may accept alternative evidence supporting the time worked for the action declared, if it considers that it offers an adequate level of assurance
- (f) additional record-keeping rules: not applicable

The records and supporting documents must be made available upon request (see Article 19) or in the context of checks, reviews, audits or investigations (see Article 25).



If there are on-going checks, reviews, audits, investigations, litigation or other pursuits of claims under the Agreement (including the extension of findings; see Article 25), the beneficiaries must keep these records and other supporting documentation until the end of these procedures.

The beneficiaries must keep the original documents. Digital and digitalised documents are considered originals if they are authorised by the applicable national law. The granting authority may accept non-original documents if they offer a comparable level of assurance.

## 20.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, costs or contributions insufficiently substantiated will be ineligible (see Article 6) and will be rejected (see Article 27), and the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## ARTICLE 21 — REPORTING

### 21.1 Continuous reporting

The beneficiaries must continuously report on the progress of the action (e.g. **deliverables, milestones, outputs/outcomes, critical risks, indicators**, etc; if any), in the Portal Continuous Reporting tool and in accordance with the timing and conditions it sets out (as agreed with the granting authority).

Standardised deliverables (e.g. progress reports not linked to payments, reports on cumulative expenditure, special reports, etc; if any) must be submitted using the templates published on the Portal.

### 21.2 Periodic reporting: Technical reports and financial statements

In addition, the beneficiaries must provide reports to request payments, in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2):

- for additional prefinancings (if any): an **additional prefinancing report**
- for interim payments (if any) and the final payment: a **periodic report**.

The prefinancing and periodic reports include a technical and financial part.

The technical part includes an overview of the action implementation. It must be prepared using the template available in the Portal Periodic Reporting tool.

The financial part of the additional prefinancing report includes a statement on the use of the previous prefinancing payment.

The financial part of the periodic report includes:

- the financial statements (individual and consolidated; for all beneficiaries/affiliated entities)
- the explanation on the use of resources (or detailed cost reporting table, if required)

- the certificates on the financial statements (CFS) (if required; see Article 24.2 and Data Sheet, Point 4.3).

The **financial statements** must detail the eligible costs and contributions for each budget category and, for the final payment, also the revenues for the action (see Articles 6 and 22).

All eligible costs and contributions incurred should be declared, even if they exceed the amounts indicated in the estimated budget (see Annex 2). Amounts that are not declared in the individual financial statements will not be taken into account by the granting authority.

By signing the financial statements (directly in the Portal Periodic Reporting tool), the beneficiaries confirm that:

- the information provided is complete, reliable and true
- the costs and contributions declared are eligible (see Article 6)
- the costs and contributions can be substantiated by adequate records and supporting documents (see Article 20) that will be produced upon request (see Article 19) or in the context of checks, reviews, audits and investigations (see Article 25)
- for the final periodic report: all the revenues have been declared (if required; see Article 22).

Beneficiaries will have to submit also the financial statements of their affiliated entities (if any). In case of recoveries (see Article 22), beneficiaries will be held responsible also for the financial statements of their affiliated entities.

### **21.3 Currency for financial statements and conversion into euros**

The financial statements must be drafted in euro.

Beneficiaries with general accounts established in a currency other than the euro must convert the costs recorded in their accounts into euro, at the average of the daily exchange rates published in the C series of the *Official Journal of the European Union* (ECB website), calculated over the corresponding reporting period.

If no daily euro exchange rate is published in the *Official Journal* for the currency in question, they must be converted at the average of the monthly accounting exchange rates published on the European Commission website (InforEuro), calculated over the corresponding reporting period.

Beneficiaries with general accounts in euro must convert costs incurred in another currency into euro according to their usual accounting practices.

### **21.4 Reporting language**

The reporting must be in the language of the Agreement, unless otherwise agreed with the granting authority (see Data Sheet, Point 4.2).

### **21.5 Consequences of non-compliance**

If a report submitted does not comply with this Article, the granting authority may suspend the payment deadline (see Article 29) and apply other measures described in Chapter 5.

If the coordinator breaches its reporting obligations, the granting authority may terminate the grant or the coordinator's participation (see Article 32) or apply other measures described in Chapter 5.

## **ARTICLE 22 — PAYMENTS AND RECOVERIES — CALCULATION OF AMOUNTS DUE**

### **22.1 Payments and payment arrangements**

Payments will be made in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2).

They will be made in euro to the bank account indicated by the coordinator (see Data Sheet, Point 4.2) and must be distributed without unjustified delay (restrictions may apply to distribution of the initial prefinancing payment; see Data Sheet, Point 4.2).

Payments to this bank account will discharge the granting authority from its payment obligation.

The cost of payment transfers will be borne as follows:

- the granting authority bears the cost of transfers charged by its bank
- the beneficiary bears the cost of transfers charged by its bank
- the party causing a repetition of a transfer bears all costs of the repeated transfer.

Payments by the granting authority will be considered to have been carried out on the date when they are debited to its account.

### **22.2 Recoveries**

Recoveries will be made, if — at beneficiary termination, final payment or afterwards — it turns out that the granting authority has paid too much and needs to recover the amounts undue.

The general liability regime for recoveries (first-line liability) is as follows: At final payment, the coordinator will be fully liable for recoveries, even if it has not been the final recipient of the undue amounts. At beneficiary termination or after final payment, recoveries will be made directly against the beneficiaries concerned.

Beneficiaries will be fully liable for repaying the debts of their affiliated entities.

In case of enforced recoveries (see Article 22.4):

- the beneficiaries will be jointly and severally liable for repaying debts of another beneficiary under the Agreement (including late-payment interest), if required by the granting authority (see Data Sheet, Point 4.4)
- affiliated entities will be held liable for repaying debts of their beneficiaries under the Agreement (including late-payment interest), if required by the granting authority (see Data Sheet, Point 4.4).

### **22.3 Amounts due**

### 22.3.1 Prefinancing payments

The aim of the prefinancing is to provide the beneficiaries with a float.

It remains the property of the EU until the final payment.

For **initial prefinancings** (if any), the amount due, schedule and modalities are set out in the Data Sheet (see Point 4.2).

For **additional prefinancings** (if any), the amount due, schedule and modalities are also set out in the Data Sheet (see Point 4.2). However, if the statement on the use of the previous prefinancing payment shows that less than 70% was used, the amount set out in the Data Sheet will be reduced by the difference between the 70% threshold and the amount used.

Prefinancing payments (or parts of them) may be offset (without the beneficiaries' consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

For grants where the granting authority is the European Commission or an EU executive agency, offsetting may also be done against amounts owed to other Commission services or executive agencies.

Payments will not be made if the payment deadline or payments are suspended (see Articles 29 and 30).

### 22.3.2 Amount due at beneficiary termination — Recovery

In case of beneficiary termination, the granting authority will determine the provisional amount due for the beneficiary concerned. Payments (if any) will be made with the next interim or final payment.

The **amount due** will be calculated in the following step:

Step 1 — Calculation of the total accepted EU contribution

#### Step 1 — Calculation of the total accepted EU contribution

The granting authority will first calculate the 'accepted EU contribution' for the beneficiary for all reporting periods, by calculating the 'maximum EU contribution to costs' (applying the funding rate to the accepted costs of the beneficiary), taking into account requests for a lower contribution to costs and CFS threshold cappings (if any; see Article 24.5) and adding the contributions (accepted unit, flat-rate or lump sum contributions and financing not linked to costs, if any).

After that, the granting authority will take into account grant reductions (if any). The resulting amount is the 'total accepted EU contribution' for the beneficiary.

The **balance** is then calculated by deducting the payments received (if any; see report on the distribution of payments in Article 32), from the total accepted EU contribution:

$$\left\{ \begin{array}{l} \text{total accepted EU contribution for the beneficiary} \\ \text{minus} \\ \text{prefinancing and interim payments received (if any)} \end{array} \right\}.$$

If the balance is **positive**, the amount will be included in the next interim or final payment to the consortium.

If the balance is **negative**, it will be **recovered** in accordance with the following procedure:

The granting authority will send a **pre-information letter** to the beneficiary concerned:

- formally notifying the intention to recover, the amount due, the amount to be recovered and the reasons why and
- requesting observations within 30 days of receiving notification.

If no observations are submitted (or the granting authority decides to pursue recovery despite the observations it has received), it will confirm the amount to be recovered and ask this amount to be paid to the coordinator (**confirmation letter**).

The amounts will later on also be taken into account for the next interim or final payment.

### 22.3.3 Interim payments

Interim payments reimburse the eligible costs and contributions claimed for the implementation of the action during the reporting periods (if any).

Interim payments (if any) will be made in accordance with the schedule and modalities set out the Data Sheet (see Point 4.2).

Payment is subject to the approval of the periodic report. Its approval does not imply recognition of compliance, authenticity, completeness or correctness of its content.

The **interim payment** will be calculated by the granting authority in the following steps:

Step 1 — Calculation of the total accepted EU contribution

Step 2 — Limit to the interim payment ceiling

#### Step 1 — Calculation of the total accepted EU contribution

The granting authority will calculate the ‘accepted EU contribution’ for the action for the reporting period, by first calculating the ‘maximum EU contribution to costs’ (applying the funding rate to the accepted costs of each beneficiary), taking into account requests for a lower contribution to costs, and CFS threshold cappings (if any; see Article 24.5) and adding the contributions (accepted unit, flat-rate or lump sum contributions and financing not linked to costs, if any).

After that, the granting authority will take into account grant reductions from beneficiary termination (if any). The resulting amount is the ‘total accepted EU contribution’.

#### Step 2 — Limit to the interim payment ceiling

The resulting amount is then capped to ensure that the total amount of prefinancing and interim payments (if any) does not exceed the interim payment ceiling set out in the Data Sheet (see Point 4.2).

Interim payments (or parts of them) may be offset (without the beneficiaries’ consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

For grants where the granting authority is the European Commission or an EU executive agency, offsetting may also be done against amounts owed to other Commission services or executive agencies.

Payments will not be made if the payment deadline or payments are suspended (see Articles 29 and 30).

### **22.3.4 Final payment — Final grant amount — Revenues and Profit — Recovery**

The final payment (payment of the balance) reimburses the remaining part of the eligible costs and contributions claimed for the implementation of the action (if any).

The final payment will be made in accordance with the schedule and modalities set out in the Data Sheet (see Point 4.2).

Payment is subject to the approval of the final periodic report. Its approval does not imply recognition of compliance, authenticity, completeness or correctness of its content.

The **final grant amount for the action** will be calculated in the following steps:

Step 1 — Calculation of the total accepted EU contribution

Step 2 — Limit to the maximum grant amount

Step 3 — Reduction due to the no-profit rule

#### Step 1 — Calculation of the total accepted EU contribution

The granting authority will first calculate the ‘accepted EU contribution’ for the action for all reporting periods, by calculating the ‘maximum EU contribution to costs’ (applying the funding rate to the total accepted costs of each beneficiary), taking into account requests for a lower contribution to costs, CFS threshold cappings (if any; see Article 24.5) and adding the contributions (accepted unit, flat-rate or lump sum contributions and financing not linked to costs, if any).

After that, the granting authority will take into account grant reductions (if any). The resulting amount is the ‘total accepted EU contribution’.

#### Step 2 — Limit to the maximum grant amount

If the resulting amount is higher than the maximum grant amount set out in Article 5.2, it will be limited to the latter.

#### Step 3 — Reduction due to the no-profit rule

If the no-profit rule is provided for in the Data Sheet (see Point 4.2), the grant must not produce a profit (i.e. surplus of the amount obtained following Step 2 plus the action’s revenues, over the eligible costs and contributions approved by the granting authority).

‘Revenue’ is all income generated by the action, during its duration (see Article 4), for beneficiaries that are profit legal entities.

If there is a profit, it will be deducted in proportion to the final rate of reimbursement of the eligible

costs approved by the granting authority (as compared to the amount calculated following Steps 1 and 2 minus the contributions).

The **balance** (final payment) is then calculated by deducting the total amount of prefinancing and interim payments already made (if any), from the final grant amount:

$$\left\{ \begin{array}{l} \text{final grant amount} \\ \text{minus} \\ \text{prefinancing and interim payments made (if any)} \end{array} \right\}.$$

If the balance is **positive**, it will be **paid** to the coordinator.

The final payment (or part of it) may be offset (without the beneficiaries' consent) against amounts owed by a beneficiary to the granting authority — up to the amount due to that beneficiary.

For grants where the granting authority is the European Commission or an EU executive agency, offsetting may also be done against amounts owed to other Commission services or executive agencies.

Payments will not be made if the payment deadline or payments are suspended (see Articles 29 and 30).

If the balance is **negative**, it will be **recovered** in accordance with the following procedure:

The granting authority will send a **pre-information letter** to the coordinator:

- formally notifying the intention to recover, the final grant amount, the amount to be recovered and the reasons why
- requesting observations within 30 days of receiving notification.

If no observations are submitted (or the granting authority decides to pursue recovery despite the observations it has received), it will confirm the amount to be recovered (**confirmation letter**), together with a **debit note** with the terms and date for payment.

If payment is not made by the date specified in the debit note, the granting authority will **enforce recovery** in accordance with Article 22.4.

### 22.3.5 Audit implementation after final payment — Revised final grant amount — Recovery

If — after the final payment (in particular, after checks, reviews, audits or investigations; see Article 25) — the granting authority rejects costs or contributions (see Article 27) or reduces the grant (see Article 28), it will calculate the **revised final grant amount** for the beneficiary concerned.

The **beneficiary revised final grant amount** will be calculated in the following step:

Step 1 — Calculation of the revised total accepted EU contribution

#### Step 1 — Calculation of the revised total accepted EU contribution

The granting authority will first calculate the 'revised accepted EU contribution' for the beneficiary, by calculating the 'revised accepted costs' and 'revised accepted contributions'.

After that, it will take into account grant reductions (if any). The resulting ‘revised total accepted EU contribution’ is the beneficiary revised final grant amount.

If the revised final grant amount is lower than the beneficiary’s final grant amount (i.e. its share in the final grant amount for the action), it will be **recovered** in accordance with the following procedure:

The **beneficiary final grant amount** (i.e. share in the final grant amount for the action) is calculated as follows:

$$\left\{ \begin{array}{l} \text{\{total accepted EU contribution for the beneficiary} \\ \text{divided by} \\ \text{total accepted EU contribution for the action\}} \\ \text{multiplied by} \\ \text{final grant amount for the action\}}. \end{array} \right.$$

The granting authority will send a **pre-information letter** to the beneficiary concerned:

- formally notifying the intention to recover, the amount to be recovered and the reasons why and
- requesting observations within 30 days of receiving notification.

If no observations are submitted (or the granting authority decides to pursue recovery despite the observations it has received), it will confirm the amount to be recovered (**confirmation letter**), together with a **debit note** with the terms and the date for payment.

Recoveries against affiliated entities (if any) will be handled through their beneficiaries.

If payment is not made by the date specified in the debit note, the granting authority will **enforce recovery** in accordance with Article 22.4.

## 22.4 Enforced recovery

If payment is not made by the date specified in the debit note, the amount due will be recovered:

- (a) by offsetting the amount — without the coordinator or beneficiary’s consent — against any amounts owed to the coordinator or beneficiary by the granting authority.

In exceptional circumstances, to safeguard the EU financial interests, the amount may be offset before the payment date specified in the debit note.

For grants where the granting authority is the European Commission or an EU executive agency, debts may also be offset against amounts owed by other Commission services or executive agencies.

- (b) by drawing on the financial guarantee(s) (if any)
- (c) by holding other beneficiaries jointly and severally liable (if any; see Data Sheet, Point 4.4)
- (d) by holding affiliated entities jointly and severally liable (if any, see Data Sheet, Point 4.4)
- (e) by taking legal action (see Article 43) or, provided that the granting authority is the European



Commission or an EU executive agency, by adopting an enforceable decision under Article 299 of the Treaty on the Functioning of the EU (TFEU) and Article 100(2) of EU Financial Regulation 2018/1046.

The amount to be recovered will be increased by **late-payment interest** at the rate set out in Article 22.5, from the day following the payment date in the debit note, up to and including the date the full payment is received.

Partial payments will be first credited against expenses, charges and late-payment interest and then against the principal.

Bank charges incurred in the recovery process will be borne by the beneficiary, unless Directive 2015/2366<sup>20</sup> applies.

For grants where the granting authority is an EU executive agency, enforced recovery by offsetting or enforceable decision will be done by the services of the European Commission (see also Article 43).

## 22.5 Consequences of non-compliance

**22.5.1** If the granting authority does not pay within the payment deadlines (see above), the beneficiaries are entitled to **late-payment interest** at the rate applied by the European Central Bank (ECB) for its main refinancing operations in euros ('reference rate'), plus the rate specified in the Data Sheet (Point 4.2). The reference rate is the rate in force on the first day of the month in which the payment deadline expires, as published in the C series of the *Official Journal of the European Union*.

If the late-payment interest is lower than or equal to EUR 200, it will be paid to the coordinator only on request submitted within two months of receiving the late payment.

Late-payment interest is not due if all beneficiaries are EU Member States (including regional and local government authorities or other public bodies acting on behalf of a Member State for the purpose of this Agreement).

If payments or the payment deadline are suspended (see Articles 29 and 30), payment will not be considered as late.

Late-payment interest covers the period running from the day following the due date for payment (see above), up to and including the date of payment.

Late-payment interest is not considered for the purposes of calculating the final grant amount.

**22.5.2** If the coordinator breaches any of its obligations under this Article, the grant may be reduced (see Article 28) and the grant or the coordinator may be terminated (see Article 32).

Such breaches may also lead to other measures described in Chapter 5.

## ARTICLE 23 — GUARANTEES

### 23.1 Prefinancing guarantee

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<sup>20</sup> Directive (EU) 2015/2366 of the European Parliament and of the Council of 25 November 2015 on payment services in the internal market, amending Directives 2002/65/EC, 2009/110/EC and 2013/36/EU and Regulation (EU) No 1093/2010, and repealing Directive 2007/64/EC (OJ L 337, 23.12.2015, p. 35).

If required by the granting authority (see Data Sheet, Point 4.2), the beneficiaries must provide (one or more) prefinancing guarantee(s) in accordance with the timing and the amounts set out in the Data Sheet.

The coordinator must submit them to the granting authority in due time before the prefinancing they are linked to.

The guarantees must be drawn up using the template published on the Portal and fulfil the following conditions:

- (a) be provided by a bank or approved financial institution established in the EU or — if requested by the coordinator and accepted by the granting authority — by a third party or a bank or financial institution established outside the EU offering equivalent security
- (b) the guarantor stands as first-call guarantor and does not require the granting authority to first have recourse against the principal debtor (i.e. the beneficiary concerned) and
- (c) remain explicitly in force until the final payment and, if the final payment takes the form of a recovery, until five months after the debit note is notified to a beneficiary.

They will be released within the following month.

## **23.2 Consequences of non-compliance**

If the beneficiaries breach their obligation to provide the prefinancing guarantee, the prefinancing will not be paid.

Such breaches may also lead to other measures described in Chapter 5.

## **ARTICLE 24 — CERTIFICATES**

### **24.1 Operational verification report (OVR)**

Not applicable

### **24.2 Certificate on the financial statements (CFS)**

If required by the granting authority (see Data Sheet, Point 4.3), the beneficiaries must provide certificates on their financial statements (CFS), in accordance with the schedule, threshold and conditions set out in the Data Sheet.

The coordinator must submit them as part of the periodic report (see Article 21).

The certificates must be drawn up using the template published on the Portal, cover the costs declared on the basis of actual costs and costs according to usual cost accounting practices (if any), and fulfil the following conditions:

- (a) be provided by a qualified approved external auditor which is independent and complies with Directive 2006/43/EC<sup>21</sup> (or for public bodies: by a competent independent public officer)

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<sup>21</sup> Directive 2006/43/EC of the European Parliament and of the Council of 17 May 2006 on statutory audits of annual accounts and consolidated accounts or similar national regulations (OJ L 157, 9.6.2006, p. 87).

- (b) the verification must be carried out according to the highest professional standards to ensure that the financial statements comply with the provisions under the Agreement and that the costs declared are eligible.

The certificates will not affect the granting authority's right to carry out its own checks, reviews or audits, nor preclude the European Court of Auditors (ECA), the European Public Prosecutor's Office (EPPO) or the European Anti-Fraud Office (OLAF) from using their prerogatives for audits and investigations under the Agreement (see Article 25).

If the costs (or a part of them) were already audited by the granting authority, these costs do not need to be covered by the certificate and will not be counted for calculating the threshold (if any).

### **24.3 Certificate on the compliance of usual cost accounting practices (CoMUC)**

Not applicable

### **24.4 Systems and process audit (SPA)**

Not applicable

### **24.5 Consequences of non-compliance**

If a beneficiary does not submit a certificate on the financial statements (CFS) or the certificate is rejected, the accepted EU contribution to costs will be capped to reflect the CFS threshold.

If a beneficiary breaches any of its other obligations under this Article, the granting authority may apply the measures described in Chapter 5.

## **ARTICLE 25 — CHECKS, REVIEWS, AUDITS AND INVESTIGATIONS — EXTENSION OF FINDINGS**

### **25.1 Granting authority checks, reviews and audits**

#### **25.1.1 Internal checks**

The granting authority may — during the action or afterwards — check the proper implementation of the action and compliance with the obligations under the Agreement, including assessing costs and contributions, deliverables and reports.

#### **25.1.2 Project reviews**

The granting authority may carry out reviews on the proper implementation of the action and compliance with the obligations under the Agreement (general project reviews or specific issues reviews).

Such project reviews may be started during the implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the coordinator or beneficiary concerned and will be considered to start on the date of the notification.

If needed, the granting authority may be assisted by independent, outside experts. If it uses outside experts, the coordinator or beneficiary concerned will be informed and have the right to object on grounds of commercial confidentiality or conflict of interest.

The coordinator or beneficiary concerned must cooperate diligently and provide — within the deadline requested — any information and data in addition to deliverables and reports already submitted (including information on the use of resources). The granting authority may request beneficiaries to provide such information to it directly. Sensitive information and documents will be treated in accordance with Article 13.

The coordinator or beneficiary concerned may be requested to participate in meetings, including with the outside experts.

For **on-the-spot visits**, the beneficiary concerned must allow access to sites and premises (including to the outside experts) 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.

On the basis of the review findings, a **project review report** will be drawn up.

The granting authority will formally notify the project review report to the coordinator or beneficiary concerned, which has 30 days from receiving notification to make observations.

Project reviews (including project review reports) will be in the language of the Agreement, unless otherwise agreed with the granting authority (see Data Sheet, Point 4.2).

### 25.1.3 Audits

The granting authority may carry out audits on the proper implementation of the action and compliance with the obligations under the Agreement.

Such audits may be started during the implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the beneficiary concerned and will be considered to start on the date of the notification.

The granting authority may use its own audit service, delegate audits to a centralised service or use external audit firms. If it uses an external firm, the beneficiary concerned will be informed and have the right to object on grounds of commercial confidentiality or conflict of interest.

The beneficiary concerned must cooperate diligently and provide — within the deadline requested — any information (including complete accounts, individual salary statements or other personal data) to verify compliance with the Agreement. Sensitive information and documents will be treated in accordance with Article 13.

For **on-the-spot** visits, the beneficiary concerned must allow access to sites and premises (including for the external audit firm) 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.

On the basis of the audit findings, a **draft audit report** will be drawn up.

The auditors will formally notify the draft audit report to the beneficiary concerned, which has 30 days from receiving notification to make observations (contradictory audit procedure).

The **final audit report** will take into account observations by the beneficiary concerned and will be formally notified to them.

Audits (including audit reports) will be in the language of the Agreement, unless otherwise agreed with the granting authority (see Data Sheet, Point 4.2).

## **25.2 European Commission checks, reviews and audits in grants of other granting authorities**

Where the granting authority is not the European Commission, the latter has the same rights of checks, reviews and audits as the granting authority.

## **25.3 Access to records for assessing simplified forms of funding**

The beneficiaries must give the European Commission access to their statutory records for the periodic assessment of simplified forms of funding which are used in EU programmes.

## **25.4 OLAF, EPPO and ECA audits and investigations**

The following bodies may also carry out checks, reviews, audits and investigations — during the action or afterwards:

- the European Anti-Fraud Office (OLAF) under Regulations No 883/2013<sup>22</sup> and No 2185/96<sup>23</sup>
- the European Public Prosecutor's Office (EPPO) under Regulation 2017/1939
- the European Court of Auditors (ECA) under Article 287 of the Treaty on the Functioning of the EU (TFEU) and Article 257 of EU Financial Regulation 2018/1046.

If requested by these bodies, the beneficiary concerned must provide full, accurate and complete information in the format requested (including complete accounts, individual salary statements or other personal data, including in electronic format) and allow access to sites and premises for on-the-spot visits or inspections — as provided for under these Regulations.

To this end, the beneficiary concerned must keep all relevant information relating to the action, at least until the time-limit set out in the Data Sheet (Point 6) and, in any case, until any ongoing checks, reviews, audits, investigations, litigation or other pursuits of claims have been concluded.

## **25.5 Consequences of checks, reviews, audits and investigations — Extension of results of reviews, audits or investigations**

### **25.5.1 Consequences of checks, reviews, audits and investigations in this grant**

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<sup>22</sup> Regulation (EU, Euratom) No 883/2013 of the European Parliament and of the Council of 11 September 2013 concerning investigations conducted by the European Anti-Fraud Office (OLAF) and repealing Regulation (EC) No 1073/1999 of the European Parliament and of the Council and Council Regulation (Euratom) No 1074/1999 (OJ L 248, 18/09/2013, p. 1).

<sup>23</sup> Council Regulation (Euratom, EC) No 2185/96 of 11 November 1996 concerning on-the-spot checks and inspections carried out by the Commission in order to protect the European Communities' financial interests against fraud and other irregularities (OJ L 292, 15/11/1996, p. 2).

Findings in checks, reviews, audits or investigations carried out in the context of this grant may lead to rejections (see Article 27), grant reduction (see Article 28) or other measures described in Chapter 5.

Rejections or grant reductions after the final payment will lead to a revised final grant amount (see Article 22).

Findings in checks, reviews, audits or investigations during the action implementation may lead to a request for amendment (see Article 39), to change the description of the action set out in Annex 1.

Checks, reviews, audits or investigations that find systemic or recurrent errors, irregularities, fraud or breach of obligations in any EU grant may also lead to consequences in other EU grants awarded under similar conditions ('extension to other grants').

Moreover, findings arising from an OLAF or EPPO investigation may lead to criminal prosecution under national law.

### 25.5.2 Extension from other grants

Results of checks, reviews, audits or investigations in other grants may be extended to this grant, if:

- (a) the beneficiary concerned is found, in other EU grants awarded under similar conditions, to have committed systemic or recurrent errors, irregularities, fraud or breach of obligations that have a material impact on this grant and
- (b) those findings are formally notified to the beneficiary concerned — together with the list of grants affected by the findings — within the time-limit for audits set out in the Data Sheet (see Point 6).

The granting authority will formally notify the beneficiary concerned of the intention to extend the findings and the list of grants affected.

If the extension concerns **rejections of costs or contributions**: the notification will include:

- (a) an invitation to submit observations on the list of grants affected by the findings
- (b) the request to submit revised financial statements for all grants affected
- (c) the correction rate for extrapolation, established on the basis of the systemic or recurrent errors, to calculate the amounts to be rejected, if the beneficiary concerned:
  - (i) considers that the submission of revised financial statements is not possible or practicable or
  - (ii) does not submit revised financial statements.

If the extension concerns **grant reductions**: the notification will include:

- (a) an invitation to submit observations on the list of grants affected by the findings and
- (b) the **correction rate for extrapolation**, established on the basis of the systemic or recurrent errors and the principle of proportionality.

The beneficiary concerned has **60 days** from receiving notification to submit observations, revised financial statements or to propose a duly substantiated **alternative correction method/rate**.

On the basis of this, the granting authority will analyse the impact and decide on the implementation (i.e. start rejection or grant reduction procedures, either on the basis of the revised financial statements or the announced/alternative method/rate or a mix of those; see Articles 27 and 28).

## **25.6 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, costs or contributions insufficiently substantiated will be ineligible (see Article 6) and will be rejected (see Article 27), and the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.

## **ARTICLE 26 — IMPACT EVALUATIONS**

### **26.1 Impact evaluation**

The granting authority may carry out impact evaluations of the action, measured against the objectives and indicators of the EU programme funding the grant.

Such evaluations may be started during implementation of the action and until the time-limit set out in the Data Sheet (see Point 6). They will be formally notified to the coordinator or beneficiaries and will be considered to start on the date of the notification.

If needed, the granting authority may be assisted by independent outside experts.

The coordinator or beneficiaries must provide any information relevant to evaluate the impact of the action, including information in electronic format.

### **26.2 Consequences of non-compliance**

If a beneficiary breaches any of its obligations under this Article, the granting authority may apply the measures described in Chapter 5.

## **CHAPTER 5 CONSEQUENCES OF NON-COMPLIANCE**

### **SECTION 1 REJECTIONS AND GRANT REDUCTION**

#### **ARTICLE 27 — REJECTION OF COSTS AND CONTRIBUTIONS**

##### **27.1 Conditions**

The granting authority will — at beneficiary termination, interim payment, final payment or afterwards — reject any costs or contributions which are ineligible (see Article 6), in particular following checks, reviews, audits or investigations (see Article 25).

The rejection may also be based on the extension of findings from other grants to this grant (see Article 25).

Ineligible costs or contributions will be rejected.

## **27.2 Procedure**

If the rejection does not lead to a recovery, the granting authority will formally notify the coordinator or beneficiary concerned of the rejection, the amounts and the reasons why. The coordinator or beneficiary concerned may — within 30 days of receiving notification — submit observations if it disagrees with the rejection (payment review procedure).

If the rejection leads to a recovery, the granting authority will follow the contradictory procedure with pre-information letter set out in Article 22.

## **27.3 Effects**

If the granting authority rejects costs or contributions, it will deduct them from the costs or contributions declared and then calculate the amount due (and, if needed, make a recovery; see Article 22).

# **ARTICLE 28 — GRANT REDUCTION**

## **28.1 Conditions**

The granting authority may — at beneficiary termination, final payment or afterwards — reduce the grant for a beneficiary, if:

- (a) the beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed:
  - (i) substantial errors, irregularities or fraud or
  - (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.), or
- (b) the beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant (see Article 25).

The amount of the reduction will be calculated for each beneficiary concerned and proportionate to the seriousness and the duration of the errors, irregularities or fraud or breach of obligations, by applying an individual reduction rate to their accepted EU contribution.

## **28.2 Procedure**

If the grant reduction does not lead to a recovery, the granting authority will formally notify the coordinator or beneficiary concerned of the reduction, the amount to be reduced and the reasons why.



The coordinator or beneficiary concerned may — within 30 days of receiving notification — submit observations if it disagrees with the reduction (payment review procedure).

If the grant reduction leads to a recovery, the granting authority will follow the contradictory procedure with pre-information letter set out in Article 22.

### **28.3 Effects**

If the granting authority reduces the grant, it will deduct the reduction and then calculate the amount due (and, if needed, make a recovery; see Article 22).

## **SECTION 2 SUSPENSION AND TERMINATION**

### **ARTICLE 29 — PAYMENT DEADLINE SUSPENSION**

#### **29.1 Conditions**

The granting authority may — at any moment — suspend the payment deadline if a payment cannot be processed because:

- (a) the required report (see Article 21) has not been submitted or is not complete or additional information is needed
- (b) there are doubts about the amount to be paid (e.g. ongoing audit extension procedure, queries about eligibility, need for a grant reduction, etc.) and additional checks, reviews, audits or investigations are necessary, or
- (c) there are other issues affecting the EU financial interests.

#### **29.2 Procedure**

The granting authority will formally notify the coordinator of the suspension and the reasons why.

The suspension will **take effect** the day the notification is sent.

If the conditions for suspending the payment deadline are no longer met, the suspension will be **lifted** — and the remaining time to pay (see Data Sheet, Point 4.2) will resume.

If the suspension exceeds two months, the coordinator may request the granting authority to confirm if the suspension will continue.

If the payment deadline has been suspended due to the non-compliance of the report and the revised report is not submitted (or was submitted but is also rejected), the granting authority may also terminate the grant or the participation of the coordinator (see Article 32).

### **ARTICLE 30 — PAYMENT SUSPENSION**

#### **30.1 Conditions**

The granting authority may — at any moment — suspend payments, in whole or in part for one or more beneficiaries, if:

- (a) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed or is suspected of having committed:
- (i) substantial errors, irregularities or fraud or
  - (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.), or
- (b) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant.

If payments are suspended for one or more beneficiaries, the granting authority will make partial payment(s) for the part(s) not suspended. If suspension concerns the final payment, the payment (or recovery) of the remaining amount after suspension is lifted will be considered to be the payment that closes the action.

## 30.2 Procedure

Before suspending payments, the granting authority will send a **pre-information letter** to the beneficiary concerned:

- formally notifying the intention to suspend payments and the reasons why and
- requesting observations within 30 days of receiving notification.

If the granting authority does not receive observations or decides to pursue the procedure despite the observations it has received, it will confirm the suspension (**confirmation letter**). Otherwise, it will formally notify that the procedure is discontinued.

At the end of the suspension procedure, the granting authority will also inform the coordinator.

The suspension will **take effect** the day after the confirmation notification is sent.

If the conditions for resuming payments are met, the suspension will be **lifted**. The granting authority will formally notify the beneficiary concerned (and the coordinator) and set the suspension end date.

During the suspension, no prefinancing will be paid to the beneficiaries concerned. For interim payments, the periodic reports for all reporting periods except the last one (see Article 21) must not contain any financial statements from the beneficiary concerned (or its affiliated entities). The coordinator must include them in the next periodic report after the suspension is lifted or — if suspension is not lifted before the end of the action — in the last periodic report.

## ARTICLE 31 — GRANT AGREEMENT SUSPENSION

### 31.1 Consortium-requested GA suspension

#### 31.1.1 Conditions and procedure

The beneficiaries may request the suspension of the grant or any part of it, if exceptional circumstances — in particular *force majeure* (see Article 35) — make implementation impossible or excessively difficult.

The coordinator must submit a request for **amendment** (see Article 39), with:

- the reasons why
- the date the suspension takes effect; this date may be before the date of the submission of the amendment request and
- the expected date of resumption.

The suspension will **take effect** on the day specified in the amendment.

Once circumstances allow for implementation to resume, the coordinator must immediately request another **amendment** of the Agreement to set the suspension end date, the resumption date (one day after suspension end date), extend the duration and make other changes necessary to adapt the action to the new situation (see Article 39) — unless the grant has been terminated (see Article 32). The suspension will be **lifted** with effect from the suspension end date set out in the amendment. This date may be before the date of the submission of the amendment request.

During the suspension, no prefinancing will be paid. Costs incurred or contributions for activities implemented during grant suspension are not eligible (see Article 6.3).

## 31.2 EU-initiated GA suspension

### 31.2.1 Conditions

The granting authority may suspend the grant or any part of it, if:

- (a) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed or is suspected of having committed:
  - (i) substantial errors, irregularities or fraud or
  - (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.), or
- (b) a beneficiary (or a person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant
- (c) other:
  - (i) linked action issues: not applicable
  - (ii) additional GA suspension grounds: not applicable.

### 31.2.2 Procedure

Before suspending the grant, the granting authority will send a **pre-information letter** to the coordinator:

- formally notifying the intention to suspend the grant and the reasons why and
- requesting observations within 30 days of receiving notification.

If the granting authority does not receive observations or decides to pursue the procedure despite the observations it has received, it will confirm the suspension (**confirmation letter**). Otherwise, it will formally notify that the procedure is discontinued.

The suspension will **take effect** the day after the confirmation notification is sent (or on a later date specified in the notification).

Once the conditions for resuming implementation of the action are met, the granting authority will formally notify the coordinator a **lifting of suspension letter**, in which it will set the suspension end date and invite the coordinator to request an amendment of the Agreement to set the resumption date (one day after suspension end date), extend the duration and make other changes necessary to adapt the action to the new situation (see Article 39) — unless the grant has been terminated (see Article 32). The suspension will be **lifted** with effect from the suspension end date set out in the lifting of suspension letter. This date may be before the date on which the letter is sent.

During the suspension, no prefinancing will be paid. Costs incurred or contributions for activities implemented during suspension are not eligible (see Article 6.3).

The beneficiaries may not claim damages due to suspension by the granting authority (see Article 33).

Grant suspension does not affect the granting authority's right to terminate the grant or a beneficiary (see Article 32) or reduce the grant (see Article 28).

## ARTICLE 32 — GRANT AGREEMENT OR BENEFICIARY TERMINATION

### 32.1 Consortium-requested GA termination

#### 32.1.1 Conditions and procedure

The beneficiaries may request the termination of the grant.

The coordinator must submit a request for **amendment** (see Article 39), with:

- the reasons why
- the date the consortium ends work on the action ('end of work date') and
- the date the termination takes effect ('termination date'); this date must be after the date of the submission of the amendment request.

The termination will **take effect** on the termination date specified in the amendment.

If no reasons are given or if the granting authority considers the reasons do not justify termination, it may consider the grant terminated improperly.

### 32.1.2 Effects

The coordinator must — within 60 days from when termination takes effect — submit a **periodic report** (for the open reporting period until termination).

The granting authority will calculate the final grant amount and final payment on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before the end of work date (see Article 22). Costs relating to contracts due for execution only after the end of work are not eligible.

If the granting authority does not receive the report within the deadline, only costs and contributions which are included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

Improper termination may lead to a grant reduction (see Article 28).

After termination, the beneficiaries' obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

## 32.2 Consortium-requested beneficiary termination

### 32.2.1 Conditions and procedure

The coordinator may request the termination of the participation of one or more beneficiaries, on request of the beneficiary concerned or on behalf of the other beneficiaries.

The coordinator must submit a request for **amendment** (see Article 39), with:

- the reasons why
- the opinion of the beneficiary concerned (or proof that this opinion has been requested in writing)
- the date the beneficiary ends work on the action ('end of work date')
- the date the termination takes effect ('termination date'); this date must be after the date of the submission of the amendment request.

If the termination concerns the coordinator and is done without its agreement, the amendment request must be submitted by another beneficiary (acting on behalf of the consortium).

The termination will **take effect** on the termination date specified in the amendment.

If no information is given or if the granting authority considers that the reasons do not justify termination, it may consider the beneficiary to have been terminated improperly.

### 32.2.2 Effects

The coordinator must — within 60 days from when termination takes effect — submit:

- (i) a **report on the distribution of payments** to the beneficiary concerned

- (ii) a **termination report** from the beneficiary concerned, for the open reporting period until termination, containing an overview of the progress of the work, the financial statement, the explanation on the use of resources, and, if applicable, the certificate on the financial statement (CFS; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
- (iii) a second **request for amendment** (see Article 39) with other amendments needed (e.g. reallocation of the tasks and the estimated budget of the terminated beneficiary; addition of a new beneficiary to replace the terminated beneficiary; change of coordinator, etc.).

The granting authority will calculate the amount due to the beneficiary on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before the end of work date (see Article 22). Costs relating to contracts due for execution only after the end of work are not eligible.

The information in the termination report must also be included in the periodic report for the next reporting period (see Article 21).

If the granting authority does not receive the termination report within the deadline, only costs and contributions which are included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

If the granting authority does not receive the report on the distribution of payments within the deadline, it will consider that:

- the coordinator did not distribute any payment to the beneficiary concerned and that
- the beneficiary concerned must not repay any amount to the coordinator.

If the second request for amendment is accepted by the granting authority, the Agreement is **amended** to introduce the necessary changes (see Article 39).

If the second request for amendment is rejected by the granting authority (because it calls into question the decision awarding the grant or breaches the principle of equal treatment of applicants), the grant may be terminated (see Article 32).

Improper termination may lead to a reduction of the grant (see Article 31) or grant termination (see Article 32).

After termination, the concerned beneficiary's obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

### 32.3 EU-initiated GA or beneficiary termination

#### 32.3.1 Conditions

The granting authority may terminate the grant or the participation of one or more beneficiaries, if:

- (a) one or more beneficiaries do not accede to the Agreement (see Article 40)
- (b) a change to the action or the legal, financial, technical, organisational or ownership situation

- of a beneficiary is likely to substantially affect the implementation of the action or calls into question the decision to award the grant (including changes linked to one of the exclusion grounds listed in the declaration of honour)
- (c) following termination of one or more beneficiaries, the necessary changes to the Agreement (and their impact on the action) would call into question the decision awarding the grant or breach the principle of equal treatment of applicants
  - (d) implementation of the action has become impossible or the changes necessary for its continuation would call into question the decision awarding the grant or breach the principle of equal treatment of applicants
  - (e) a beneficiary (or person with unlimited liability for its debts) is subject to bankruptcy proceedings or similar (including insolvency, winding-up, administration by a liquidator or court, arrangement with creditors, suspension of business activities, etc.)
  - (f) a beneficiary (or person with unlimited liability for its debts) is in breach of social security or tax obligations
  - (g) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has been found guilty of grave professional misconduct
  - (h) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed fraud, corruption, or is involved in a criminal organisation, money laundering, terrorism-related crimes (including terrorism financing), child labour or human trafficking
  - (i) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) was created under a different jurisdiction with the intent to circumvent fiscal, social or other legal obligations in the country of origin (or created another entity with this purpose)
  - (j) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed:
    - (i) substantial errors, irregularities or fraud or
    - (ii) serious breach of obligations under this Agreement or during its award (including improper implementation of the action, non-compliance with the call conditions, submission of false information, failure to provide required information, breach of ethics or security rules (if applicable), etc.)
  - (k) a beneficiary (or person having powers of representation, decision-making or control, or person essential for the award/implementation of the grant) has committed — in other EU grants awarded to it under similar conditions — systemic or recurrent errors, irregularities, fraud or serious breach of obligations that have a material impact on this grant (extension of findings from other grants to this grant; see Article 25)
  - (l) despite a specific request by the granting authority, a beneficiary does not request — through the coordinator — an amendment to the Agreement to end the participation of one of its

affiliated entities or associated partners that is in one of the situations under points (d), (f), (e), (g), (h), (i) or (j) and to reallocate its tasks, or

(m) other:

- (i) linked action issues: not applicable
- (ii) additional GA termination grounds: not applicable.

### 32.3.2 Procedure

Before terminating the grant or participation of one or more beneficiaries, the granting authority will send a **pre-information letter** to the coordinator or beneficiary concerned:

- formally notifying the intention to terminate and the reasons why and
- requesting observations within 30 days of receiving notification.

If the granting authority does not receive observations or decides to pursue the procedure despite the observations it has received, it will confirm the termination and the date it will take effect (**confirmation letter**). Otherwise, it will formally notify that the procedure is discontinued.

For beneficiary terminations, the granting authority will — at the end of the procedure — also inform the coordinator.

The termination will **take effect** the day after the confirmation notification is sent (or on a later date specified in the notification; ‘termination date’).

### 32.3.3 Effects

(a) for **GA termination**:

The coordinator must — within 60 days from when termination takes effect — submit a **periodic report** (for the last open reporting period until termination).

The granting authority will calculate the final grant amount and final payment on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before termination takes effect (see Article 22). Costs relating to contracts due for execution only after termination are not eligible.

If the grant is terminated for breach of the obligation to submit reports, the coordinator may not submit any report after termination.

If the granting authority does not receive the report within the deadline, only costs and contributions which are included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

Termination does not affect the granting authority’s right to reduce the grant (see Article 28) or to impose administrative sanctions (see Article 34).

The beneficiaries may not claim damages due to termination by the granting authority (see Article 33).



After termination, the beneficiaries' obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

(b) for **beneficiary termination**:

The coordinator must — within 60 days from when termination takes effect — submit:

- (i) a **report on the distribution of payments** to the beneficiary concerned
- (ii) a **termination report** from the beneficiary concerned, for the open reporting period until termination, containing an overview of the progress of the work, the financial statement, the explanation on the use of resources, and, if applicable, the certificate on the financial statement (CFS; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
- (iii) a **request for amendment** (see Article 39) with any amendments needed (e.g. reallocation of the tasks and the estimated budget of the terminated beneficiary; addition of a new beneficiary to replace the terminated beneficiary; change of coordinator, etc.).

The granting authority will calculate the amount due to the beneficiary on the basis of the report submitted and taking into account the costs incurred and contributions for activities implemented before termination takes effect (see Article 22). Costs relating to contracts due for execution only after termination are not eligible.

The information in the termination report must also be included in the periodic report for the next reporting period (see Article 21).

If the granting authority does not receive the termination report within the deadline, only costs and contributions included in an approved periodic report will be taken into account (no costs/contributions if no periodic report was ever approved).

If the granting authority does not receive the report on the distribution of payments within the deadline, it will consider that:

- the coordinator did not distribute any payment to the beneficiary concerned and that
- the beneficiary concerned must not repay any amount to the coordinator.

If the request for amendment is accepted by the granting authority, the Agreement is **amended** to introduce the necessary changes (see Article 39).

If the request for amendment is rejected by the granting authority (because it calls into question the decision awarding the grant or breaches the principle of equal treatment of applicants), the grant may be terminated (see Article 32).

After termination, the concerned beneficiary's obligations (in particular Articles 13 (confidentiality and security), 16 (IPR), 17 (communication, dissemination and visibility), 21 (reporting), 25 (checks, reviews, audits and investigations), 26 (impact evaluation), 27 (rejections), 28 (grant reduction) and 42 (assignment of claims)) continue to apply.

## **SECTION 3 OTHER CONSEQUENCES: DAMAGES AND ADMINISTRATIVE SANCTIONS**

### **ARTICLE 33 — DAMAGES**

#### **33.1 Liability of the granting authority**

The granting authority cannot be held liable for any damage caused to the beneficiaries or to third parties as a consequence of the implementation of the Agreement, including for gross negligence.

The granting authority cannot be held liable for any damage caused by any of the beneficiaries or other participants involved in the action, as a consequence of the implementation of the Agreement.

#### **33.2 Liability of the beneficiaries**

The beneficiaries must compensate the granting authority 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 Agreement, provided that it was caused by gross negligence or wilful act.

The liability does not extend to indirect or consequential losses or similar damage (such as loss of profit, loss of revenue or loss of contracts), provided such damage was not caused by wilful act or by a breach of confidentiality.

### **ARTICLE 34 — ADMINISTRATIVE SANCTIONS AND OTHER MEASURES**

Nothing in this Agreement may be construed as preventing the adoption of administrative sanctions (i.e. exclusion from EU award procedures and/or financial penalties) or other public law measures, in addition or as an alternative to the contractual measures provided under this Agreement (see, for instance, Articles 135 to 145 EU Financial Regulation 2018/1046 and Articles 4 and 7 of Regulation 2988/95<sup>24</sup>).

## **SECTION 4 FORCE MAJEURE**

### **ARTICLE 35 — FORCE MAJEURE**

A party prevented by force majeure from fulfilling its obligations under the Agreement cannot be considered in breach of them.

‘Force majeure’ means any situation or event that:

- prevents either party from fulfilling their obligations under the Agreement,
- was unforeseeable, exceptional situation and beyond the parties’ control,
- was not due to error or negligence on their part (or on the part of other participants involved in the action), and
- proves to be inevitable in spite of exercising all due diligence.

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<sup>24</sup> Council Regulation (EC, Euratom) No 2988/95 of 18 December 1995 on the protection of the European Communities financial interests (OJ L 312, 23.12.1995, p. 1).

Any situation constituting force majeure must be formally notified to the other party without delay, stating the nature, likely duration and foreseeable effects.

The parties must immediately take all the necessary steps to limit any damage due to force majeure and do their best to resume implementation of the action as soon as possible.

## **CHAPTER 6 FINAL PROVISIONS**

### **ARTICLE 36 — COMMUNICATION BETWEEN THE PARTIES**

#### **36.1 Forms and means of communication — Electronic management**

EU grants are managed fully electronically through the EU Funding & Tenders Portal ('Portal').

All communications must be made electronically through the Portal, in accordance with the Portal Terms and Conditions and using the forms and templates provided there (except if explicitly instructed otherwise by the granting authority).

Communications must be made in writing and clearly identify the grant agreement (project number and acronym).

Communications must be made by persons authorised according to the Portal Terms and Conditions. For naming the authorised persons, each beneficiary must have designated — before the signature of this Agreement — a 'legal entity appointed representative (LEAR)'. The role and tasks of the LEAR are stipulated in their appointment letter (see Portal Terms and Conditions).

If the electronic exchange system is temporarily unavailable, instructions will be given on the Portal.

#### **36.2 Date of communication**

The sending date for communications made through the Portal will be the date and time of sending, as indicated by the time logs.

The receiving date for communications made through the Portal will be the date and time the communication is accessed, as indicated by the time logs. Formal notifications that have not been accessed within 10 days after sending, will be considered to have been accessed (see Portal Terms and Conditions).

If a communication is exceptionally made on paper (by e-mail or postal service), general principles apply (i.e. date of sending/receipt). Formal notifications by registered post with proof of delivery will be considered to have been received either on the delivery date registered by the postal service or the deadline for collection at the post office.

If the electronic exchange system is temporarily unavailable, the sending party cannot be considered in breach of its obligation to send a communication within a specified deadline.

#### **36.3 Addresses for communication**

The Portal can be accessed via the Europa website.

The address for paper communications to the granting authority (if exceptionally allowed) is the official mailing address indicated on its website.

For beneficiaries, it is the legal address specified in the Portal Participant Register.

## **ARTICLE 37 — INTERPRETATION OF THE AGREEMENT**

The provisions in the Data Sheet take precedence over the rest of the Terms and Conditions of the Agreement.

Annex 5 takes precedence over the Terms and Conditions; the Terms and Conditions take precedence over the Annexes other than Annex 5.

Annex 2 takes precedence over Annex 1.

## **ARTICLE 38 — CALCULATION OF PERIODS AND DEADLINES**

In accordance with Regulation No 1182/71<sup>25</sup>, periods expressed in days, months or years are calculated from the moment the triggering event occurs.

The day during which that event occurs is not considered as falling within the period.

‘Days’ means calendar days, not working days.

## **ARTICLE 39 — AMENDMENTS**

### **39.1 Conditions**

The Agreement may be amended, unless the amendment entails changes to the Agreement which would call into question the decision awarding the grant or breach the principle of equal treatment of applicants.

Amendments may be requested by any of the parties.

### **39.2 Procedure**

The party requesting an amendment must submit a request for amendment signed directly in the Portal Amendment tool.

The coordinator submits and receives requests for amendment on behalf of the beneficiaries (see Annex 3). If a change of coordinator is requested without its agreement, the submission must be done by another beneficiary (acting on behalf of the other beneficiaries).

The request for amendment must include:

- the reasons why
- the appropriate supporting documents and

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<sup>25</sup> Regulation (EEC, Euratom) No 1182/71 of the Council of 3 June 1971 determining the rules applicable to periods, dates and time-limits (OJ L 124, 8/6/1971, p. 1).

- for a change of coordinator without its agreement: the opinion of the coordinator (or proof that this opinion has been requested in writing).

The granting authority may request additional information.

If the party receiving the request agrees, it must sign the amendment in the tool within 45 days of receiving notification (or any additional information the granting authority has requested). If it does not agree, it must formally notify its disagreement within the same deadline. The deadline may be extended, if necessary for the assessment of the request. If no notification is received within the deadline, the request is considered to have been rejected.

An amendment **enters into force** on the day of the signature of the receiving party.

An amendment **takes effect** on the date of entry into force or other date specified in the amendment.

## **ARTICLE 40 — ACCESSION AND ADDITION OF NEW BENEFICIARIES**

### **40.1 Accession of the beneficiaries mentioned in the Preamble**

The beneficiaries which are not coordinator must accede to the grant by signing the accession form (see Annex 3) directly in the Portal Grant Preparation tool, within 30 days after the entry into force of the Agreement (see Article 44).

They will assume the rights and obligations under the Agreement with effect from the date of its entry into force (see Article 44).

If a beneficiary does not accede to the grant within the above deadline, the coordinator must — within 30 days — request an amendment (see Article 39) to terminate the beneficiary and make any changes necessary to ensure proper implementation of the action. This does not affect the granting authority's right to terminate the grant (see Article 32).

### **40.2 Addition of new beneficiaries**

In justified cases, the beneficiaries may request the addition of a new beneficiary.

For this purpose, the coordinator must submit a request for amendment in accordance with Article 39. It must include an accession form (see Annex 3) signed by the new beneficiary directly in the Portal Amendment tool.

New beneficiaries will assume the rights and obligations under the Agreement with effect from the date of their accession specified in the accession form (see Annex 3).

Additions are also possible in mono-beneficiary grants.

## **ARTICLE 41 — TRANSFER OF THE AGREEMENT**

In justified cases, the beneficiary of a mono-beneficiary grant may request the transfer of the grant to a new beneficiary, provided that this would not call into question the decision awarding the grant or breach the principle of equal treatment of applicants.

The beneficiary must submit a request for **amendment** (see Article 39), with

- the reasons why
- the accession form (see Annex 3) signed by the new beneficiary directly in the Portal Amendment tool and
- additional supporting documents (if required by the granting authority).

The new beneficiary will assume the rights and obligations under the Agreement with effect from the date of accession specified in the accession form (see Annex 3).

## **ARTICLE 42 — ASSIGNMENTS OF CLAIMS FOR PAYMENT AGAINST THE GRANTING AUTHORITY**

The beneficiaries may not assign any of their claims for payment against the granting authority to any third party, except if expressly approved in writing by the granting authority on the basis of a reasoned, written request by the coordinator (on behalf of the beneficiary concerned).

If the granting authority has not accepted the assignment or if the terms of it are not observed, the assignment will have no effect on it.

In no circumstances will an assignment release the beneficiaries from their obligations towards the granting authority.

## **ARTICLE 43 — APPLICABLE LAW AND SETTLEMENT OF DISPUTES**

### **43.1 Applicable law**

The Agreement is governed by the applicable EU law, supplemented if necessary by the law of Belgium.

Special rules may apply for beneficiaries which are international organisations (if any; see Data Sheet, Point 5).

### **43.2 Dispute settlement**

If a dispute concerns the interpretation, application or validity of the Agreement, the parties must bring action before the EU General Court — or, on appeal, the EU Court of Justice — under Article 272 of the Treaty on the Functioning of the EU (TFEU).

For non-EU beneficiaries (if any), such disputes must be brought before the courts of Brussels, Belgium — unless an international agreement provides for the enforceability of EU court judgements.

For beneficiaries with arbitration as special dispute settlement forum (if any; see Data Sheet, Point 5), the dispute will — in the absence of an amicable settlement — be settled in accordance with the Rules for Arbitration published on the Portal.

If a dispute concerns administrative sanctions, offsetting or an enforceable decision under Article 299 TFEU (see Articles 22 and 34), the beneficiaries must bring action before the General Court — or, on appeal, the Court of Justice — under Article 263 TFEU.

For grants where the granting authority is an EU executive agency (see Preamble), actions against

offsetting and enforceable decisions must be brought against the European Commission (not against the granting authority; see also Article 22).

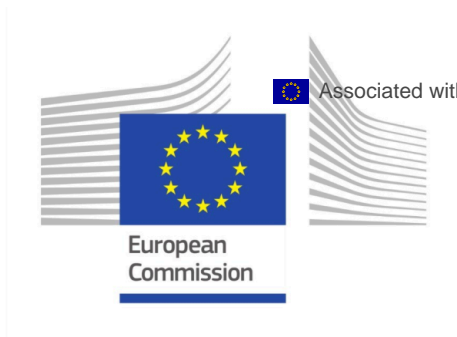
**ARTICLE 44 — ENTRY INTO FORCE**

The Agreement will enter into force on the day of signature by the granting authority or the coordinator, depending on which is later.

**SIGNATURES**

For the coordinator

For the granting authority



## **ANNEX 1**



# **Social Prerogative and Specific Competencies Lines (SOCPL)**

## **Description of the action (DoA)**

**Part A**

**Part B**



## DESCRIPTION OF THE ACTION (PART A)

### COVER PAGE

*Part A of the Description of the Action (DoA) must be completed directly on the Portal Grant Preparation screens.*

<b>PROJECT</b>	
<i>Grant Preparation (General Information screen) — Enter the info.</i>	
<b>Project number:</b>	101143366
<b>Project name:</b>	Increasing Metalworkers’ representatives’ Awareness and Skills on Mental Health Protection & Promotion in the Workplace
<b>Project acronym:</b>	IncreMe-n-tal
<b>Call:</b>	SOCPL-2023-INFO-WK
<b>Topic:</b>	SOCPL-2023-INFO-WK
<b>Type of action:</b>	SOCPL-PJG
<b>Service:</b>	EMPL/C/03
<b>Project starting date:</b>	first day of the month following the entry into force date
<b>Project duration:</b>	24 months

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## PROJECT SUMMARY

### Project summary

*Grant Preparation (General Information screen) — Provide an overall description of your project (including context and overall objectives, planned activities and main achievements, and expected results and impacts (on target groups, change procedures, capacities, innovation etc)). This summary should give readers a clear idea of what your project is about.*

*Use the project summary from your proposal.*

IncreMe(n)tal (Increasing Metalworkers' representatives' Awareness and Skills on Mental Health Protection & Promotion in the Workplace) aims at providing quality training to trade unionists and workers' representatives in the metalworking industry in 7 target countries and at transnational level, in order to increase their awareness concerning emerging psychosocial risks connected to work environment and work organisation, but also regarding the strategic role of social dialogue and collective bargaining initiatives in protecting and promoting workers' mental health. This will be achieved through

(1) the close cooperation between “research” BENs, experts, trade unions (TU) and APs and through the delivery of 22 training sessions (at national and transnational level), organised thematically, taking into account sectoral and national peculiarities but also the international context and practices in the field;

(2) the implementation of communication and dissemination activities designed to fit in with other European and international initiatives and gatherings organised on the theme of risk prevention and mental health promotion in the workplace.

IncreMe(n)tal consortium consists of the leading applicant FIM-CISL (IT), 6 Research beneficiaries (Fond. ADAPT (IT), DCU (IE), CELSI (SK), UL (SI), USC (ES), KU Leuven (BE), HACETTEPE (TR)), 6 trade union beneficiaries (VZW (BE), SIPTU (IE), SKEI (SI), UGT-FICA (ES), TMS (TR)), 2 associate organisations (IndustriAll Europe, OZ KOVO (SK)) and one affiliated entity (ADAPT (IT)).

## LIST OF PARTICIPANTS

### PARTICIPANTS

*Grant Preparation (Beneficiaries screen) — Enter the info.*

Number	Role	Short name	Legal name	Country	PIC
1	COO	FIM CISL	FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE	IT	890855276
2	BEN	FOND_ADAPT	FONDAZIONE ADAPT	IT	941351245
2.1	AE	ADAPT	ADAPT ASSOCIAZIONE PER GLI STUDI INTERNAZIONALI E COMPARATI SUL DIRITTO DEL LAVORO E SULLE RELAZIONI INDUSTRIALI	IT	986396881
3	BEN	USC	UNIVERSIDAD DE SANTIAGO DE COMPOSTELA	ES	999829635
4	BEN	UGT FICA	FEDERACION DE INDUSTRIA, CONSTRUCCION Y AGRO DE LA UNION GENERAL DE TRABAJADORES	ES	890682422
5	BEN	KU Leuven	KATHOLIEKE UNIVERSITEIT LEUVEN	BE	999991334
6	BEN	VZW	VORMINGSCENTRUM RECHT EN Plicht	BE	890581057
7	BEN	UL	UNIVERZA V LJUBLJANI	SI	999923240

**PARTICIPANTS***Grant Preparation (Beneficiaries screen) — Enter the info.*

<b>Number</b>	<b>Role</b>	<b>Short name</b>	<b>Legal name</b>	<b>Country</b>	<b>PIC</b>
8	BEN	SKEI	SINDIKAT KOVINSKE IN ELEKTROINDUSTRIJE SLOVENIJE	SI	885950471
9	BEN	HACETTEPE_UNI	HACETTEPE UNIVERSITESI	TR	999900930
10	BEN	TMS	TURK METAL SENDIKASI	TR	944440501
11	BEN	DCU	DUBLIN CITY UNIVERSITY	IE	999892588
12	BEN	SIPTU	SERVICES, INDUSTRIAL, PROFESSIONAL AND TECHNICAL UNION	IE	882028373
13	BEN	CELSI	STREDOEUROPSKY INSTITUT PRE VYSKUM PRACE	SK	997562066
14	AP	KOVO	Odborový zväz KOVO	SK	884934687
15	AP	IAE	INDUSTRIALL EUROPEAN TRADE UNION ASSOCIATION DE FAIT	BE	941799191

## LIST OF WORK PACKAGES

<b>Work packages</b>						
<i>Grant Preparation (Work Packages screen) — Enter the info.</i>						
<b>Work Package No</b>	<b>Work Package name</b>	<b>Lead Beneficiary</b>	<b>Effort (Person-Months)</b>	<b>Start Month</b>	<b>End Month</b>	<b>Deliverables</b>
WP1	Project coordination and monitoring, risk management and quality assurance	1 - FIM CISL	26.00	1	24	D1.1 – Administrative Package set up D1.2 – Final Quality Assessment Report
WP2	Research activities and preparation for training	2 - FOND_ADAPT	30.20	2	24	D2.1 – IncreMe(n)tal National Highlights D2.2 – IncreMe(n)tal EU Interactive Guide D2.3 – IncreMe(n)tal Comparative Policy Brief
WP3	Awareness raising and training activities	1 - FIM CISL	11.70	11	24	D3.1 – National training sessions D3.2 – Transnational training session D3.3 – Training evaluation Report
WP4	Communication, dissemination and follow-up activities	1 - FIM CISL	15.00	2	24	D4.1 – Impact amplification plan: communication, stakeholder engagement and sustainability D4.2 – Presentation video of the EU Interactive Guide

## Work package WP1 – Project coordination and monitoring, risk management and quality assurance

<b>Work Package Number</b>	WP1	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Work Package Name</b>	Project coordination and monitoring, risk management and quality assurance		
<b>Start Month</b>	1	<b>End Month</b>	24

Objectives
<ul style="list-style-type: none"> <li># to organise the smooth development and management of the project by coordinating the work of the consortium</li> <li># to consult, whenever necessary with the European Commission</li> <li># to coordinate and ensure timely production and submission of all deliverables</li> <li># to secure high quality of project outputs and deliverables</li> <li># to implement a monitoring, quality assurance and risk management system across all work packages</li> </ul>

Description
<p>T1.1 Project coordination, including administrative, legal and financial management FIM CISL will guarantee timely and well-aligned project implementation according to high standards of quality, ensuring the cooperation between all partners across different WPs and liaising with WP leaders to ensure appropriate progress of activities in all WPs and tasks. A detailed Project Roadmap will be developed to monitor the progress of each WP with a timeline and main milestones of their progression throughout the project. The roadmap will be the outcome of the Kick-off Meeting (M2). Moreover, FIM CISL will coordinate the relevant legal and administrative work, which includes but is not limited to preparation and signing of the Consortium Agreement, and Data Protection and Ethics Policy (implemented with the support of Fond. ADAPT) – which, together with the Project Roadmap, will compose the Administrative package set-up (D1.1), to be finalized by M3. All BENs will provide FIM-CISL with all necessary information to produce project documentation. FIM CISL will also coordinate the communication between beneficiaries, the European Commission and other stakeholders through the Funding and Tenders portal. Finally, under this WP, FIM CISL will ensure a sound overall administrative and financial management, while monitoring progress throughout the life-time of the project (namely dealing with so-called 'continuous reporting' to the European Commission), and by developing interim (M12) and final (M24) administrative and financial reports.</p> <p>Kick-off meeting and project progress meetings This task includes the organization of a hybrid Kick-off Meeting (KoM) (4 hours) at the start of the project (M2), of 11 online bi-monthly meetings (1,5 hours each) to start in M3 and to end in M23, and 2 in-person Progress meetings, to be organized in M12 and M24 (the latter in the context of the Final Conference – corresponding to the meeting mentioned in T1.3). The kick-off meeting aims to set the basis for partnership cooperation and launch WP1 activities, while the bi-monthly meetings are aimed at promoting discussion among the partners on the progress made on research activities, training modules and dissemination initiatives and solve potential issues concerning the project across the different WPs. The first in-person Progress meeting (M12) will be aimed at evaluating the final research outputs and stimulate discussion regarding training organization and training materials; the second will instead be focused on the Final Quality Assessment of the training activities and research outputs (see T1.3). The KoM will be organised by FIM-CISL, and held in Rome at its premises, while the meeting on M12 will be organized by USC, and held in Santiago De Compostela. Further calls or online meetings could be organized upon request by one of the BEN should a need arise. For cost-effectiveness reasons, min. 1 person per BEN will attend the kick-off meeting and the in-person Progress meetings (M12-M24). Bi-monthly meetings will be attended remotely by min. 2 people per BEN as well as any possible other further online meetings. The KoM will be also participated (remotely) by 1 member of each AP involved in the project. Participation of APs in bi-monthly and progress meetings is on a voluntary basis. The Quality Assessment Officer, who will be officially appointed during the KoM, (see Task 1.3) will attend the Kick-off Meeting on M2, and the Progress meetings on M12 and M24. FIM-CISL will prepare the agenda of the KoM and the Progress meetings and provide minutes for both events. Travel and accommodation expenses for the QAO will be borne by the COO. With reference to the work languages, the main one will be English, while interpretation services are foreseen both for the KoM (ENG&lt;&gt;ES) and progress meetings (ENG&lt;&gt;ES). The costs incurred for these services will be borne by the coordinator and interpreters will be hired both for online and in-person meetings. This is possible due to the purchase of a</p>

2-year Zoom Events and Webinar subscription which will also allow hybrid format events (KoM, Transnational training session, Final Conference). This service has been chosen on the basis of the best quality-price ratio in terms of features.

#### Monitoring, quality assurance and risk assessment

FIM-CISL will oversee the project implementation and verify the deliverables produced by the project BENs, also in collaboration with Lead BENs of various WPs and Tasks. The quality control is further enhanced by the development of research outputs and training activities by renowned research institutes and universities with certified track records in projects studying mental health issues emerging in the employment context. Moreover, an external expert (QAO) will be involved in the evaluation of research outputs and the discussion on the structure and contents of training activities, especially in the context of the progress meetings to be held during M12 and M24.

The monitoring and risk assessment approach for the project will be rolled out in a recurring, circular way, covering all the key processes and outputs, through: collection of inputs from all partners (including, whenever necessary APs) via calls and emails; continuous assessment of the project's progress, identification and evaluation of possible deviations or risks; risk mitigation (see § 2.7); identification of appropriate corrective measures (if needed) and their negotiation with BENs and the European Commission; cross-validation of deliverables to be carried out by all partners, regardless of their direct involvement in their production; online bi-monthly meetings to be participated by BENs. Project management and monitoring tools (i.e., Gantt Chart Baseline, common mailing group, cloud/online repository of documentation) will be deployed by FIM-CISL.

During the context of the Final Conference (M24) all project partners will be involved in a Final Quality Assessment meeting, also participated by the QAO: the outcome of the meeting will be a Final Quality Assessment Report for internal use (D1.2).

## Work package WP2 – Research activities and preparation for training

<b>Work Package Number</b>	WP2	<b>Lead Beneficiary</b>	2 - FOND_ADAPT
<b>Work Package Name</b>	Research activities and preparation for training		
<b>Start Month</b>	2	<b>End Month</b>	24

#### Objectives

To collect background information and conducting preliminary research supporting training activities. # To shed light on topics connected to mental health prevention (regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers' mental health; links between workplace digitalization and workers' mental health; work environment, inequalities and workers' mental health) in seven target countries (IT, IE, ES, BE, TR, SK, SI) and at European-level. This information will be used by partners responsible for training activities, and collected in 1 European-level Interactive Guide and 1 Comparative Policy Brief to be disseminated in all EU27 countries + Turkey.

#### Description

##### T2.1

Preparation of questionnaires and interviews outlines - identification of contacts included

Thanks to the collaboration with all research partners, Fond. ADAPT will design a questionnaire aimed at exploring key project topics, to be approved by all partners and then administered to workers employed in companies of the metalworking sector located in the countries covered by the project - with the support of the trade union BENs active in these countries. The questionnaire outline will be composed of standard multiple-choice questions and open-ended questions which may instead be diversified in each different country. The questionnaire will be administered via SurveyMonkey. Moreover, involving all research partners, Fond. ADAPT will draft two semi-structured interview outlines. The first outline will be needed to conduct interviews with company-level workers' representatives active in the field of OSH (e.g., regarding the Italian context, RLS (Rappresentanti dei lavoratori per la sicurezza – Workers' representatives for health and safety), sectoral-level trade unionists and companies (i.e., employers/HR managers) in the metalworking sector; the second will be used to interview members of European-level/international representative organisations (e.g., IndustriAll Europe; CEEMET; ILO) with specific expertise in OSH matters. Both interview outlines will be validated by trade union partners.

Trade union partners (BENs & APs) will identify suitable respondents and interviewees in countries covered by the project and support the circulation of the questionnaire by M4. Notably, FIM-CISL will identify interviewees and

respondents in IT; UGT-FICA in ES; VZW in BE; OZ KOVO in SK; SKEI in SI; SIPTU in IE; TMS in TR. The questionnaire and interview outlines will be produced in English by ADAPT and then translated in national languages by each research partner. Interviews will be recorded and transcribed with the help of a translation software.

## T2.2

Administration of questionnaires and interviews - data & info collection and analysis included

The questionnaire will be administered by research partners to workers employed in companies in the metalworking sector located in the countries covered by the project (min. 30 per country). These will be hosted by an online software (SurveyMonkey) or administered by hand (when necessary to reach project targets). The interviews will take place by phone or online communication tools by research partners using contacts provided by trade union partners (see below). Notably, Fond. ADAPT is responsible for administering questionnaires and interviews in IT; USC for ES; KU Leuven for BE; Celsi for SK; UL for SI; DCU for IE; HACETTEPE for TR. KU Leuven will conduct the interviews also with members of European-level/international representative organisations (e.g., IndustriAll Europe; CEEMET; ILO) In-person interviews will occur if they don't require any additional travel and accommodation expenses. Interviews to workers' representatives/sectoral trade unionists/companies can be carried out in national languages; interviews to international respondents will be carried out in English. All interviews must be recorded (interviewees' consent will be appropriately collected). The recordings will be destroyed after the end of the project.

Target quality check concerning the nr. of respondents engaged:

- Administration of the questionnaire and reception of at least 30 completed responses per selected country.
- Conduction of interviews with at least 2 workers' representatives active in OSH + 1 sectoral trade unionist + 2 companies per selected country.
- Conduct of interviews with at least 3 international-level respondents.

All respondents' information will be securely stored in Survey Monkey data centres (along with being able to draw it down in excel).

Means of verification: interview recordings (only audio).

## T2.3

Desk research concerning mental health in the workplace

All research partners will carry out desk research aimed at collecting and analysing scientific literature and institutional reports concerning the issue of mental health risks in the workplace, but also at gathering best practices to use as informative materials in the context of training activities. Social dialogue practices and collective agreements (at national, territorial and company-level) will also be included in the desk research as valuable sources – focusing specifically on the metalworking sector. “Tripartite plus” practices will be integrated in the research if available to inform the transnational training session.

Namely, the desk research conducted for each target country will be focused on 1) the regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers' mental health 2) links between workplace digitalization and workers' mental health 3) work environment, inequalities and workers' mental health. Each stream of research will correspond to a dedicated training session at national level (see T3.2).

Fond. ADAPT is responsible for conducting the analysis for IT; USC for ES; KU Leuven for BE; Celsi for SK; UL for SI; DCU for IE.

FIM-CISL, VZW, SIPTU, OZ KOVO, SKEI, UGT-FICA and IndustriAll Europe will provide research partners additional documentation and CLAs to integrate the analysis. The minimum nr. of sources to be used in the desk research will be the object of decision during the KoM and verified by the QAO during the first progress meeting (M12 – see WP1).

## T2.4

IncreMe(n)tal National Highlights - drafting and delivery

Using the data collected during T2.2. and T2.3, all research partners will be responsible for drafting a document (around 25 pages each + annexes) for each selected country. The National highlights will be drafted in English for internal use, timely submitted to the QAO for his/her validation and then translated in each country's national languages to maximise their dissemination impact (research BENs have already provided their decision concerning the opportunity to go for in-house translation or outsourcing this activity: this is reflected in the budget). A language register will be used which is appropriate for the readers and the purpose of the document.

In order to facilitate their access by the selected target audience (trade unionists, workers' representatives, workers, OSH practitioners, companies) the Highlight will adopt a user-friendly layout and approach (using a common template to be provided by Fond. ADAPT), including a synthetic literature review of selected sources, but also sections dedicated to fictional cases and a FAQ section. Among the annexes of the National Highlights, a self- standing annex covering tips and guidance for organizational-level interventions in protecting and promoting mental health in the workplace will

be provided. The finalized National Highlights (D2.1) will also serve as background material to structure the national training activities foreseen by the project (see T3.2).

After evaluation by the QAO during the progress meeting of M12, the National Highlights will be uploaded on the project webpage and disseminated through partners’ social media accounts (including the projects’ Twitter account – see WP5). In addition, a summary of each National Highlight will be sent by each research BEN to the corresponding EU-OSHA National Focal point. Two special issues of the ADAPT International Bulletin and the CIELO Laboral Newsletter will be released encompassing all the Highlights (for more details, see WP4 and § 3.2)

**T2.5**

**IncreMe(n)tal EU Interactive Guide - drafting & delivery**

Using the inputs collected through previous research phases and the transnational training session (see T3.3), UL, with the support of Fond. ADAPT (which will be mainly in charge of releasing the online version of the Guide), will draft a European-level interactive Guide dedicated to the project topics. The dissemination will be carried out through the means of communication described in WP5 (webpage; social media).

The Guide will be drafted in English and validated by all partners. Its translation in all EU27 languages and Turkish will be ensured by an automatic translation plug-in to be installed on the project webpage. The EU Interactive Guide will be presented during the Final Conference (see T4.4), and then disseminated through the project webpage and Twitter account.

The QAO will be asked to provide feedback on the content of the draft version of the Guide by M22.

**T2.6**

**IncreMe(n)tal Comparative Policy Brief - drafting & delivery**

Under the coordination of CELSI, Research BENs will deliver a Comparative Policy Brief, building from the results of the National Highlights. The document will be structured in different chapters, each dedicated to the result of research activities conducted in target countries, plus one comparative chapter to be drafted by CELSI. The Brief will be published on the project webpage and on the CELSI website (under the section "Research reports"). All BENs involved will be asked to provide feedback and any additional information useful to the completion of the document.

The QAO could be involved on voluntary basis in the drafting of the policy brief preface.

**Work package WP3 – Awareness raising and training activities**

<b>Work Package Number</b>	WP3	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Work Package Name</b>	Awareness raising and training activities		
<b>Start Month</b>	11	<b>End Month</b>	24

**Objectives**

Provision of quality training to groups of workers’ representatives and trade unionists in the target countries and at a transnational level, building on research activities. Training contents: regulatory framework for the prevention of psychosocial risks and management of the consequences of any pathologies related to workers' mental health; links between workplace digitalization and workers’ mental health; work environment, inequalities and workers' mental health.

**Description**

**T3.1**

**Training activities organization and course design**

Training activities, as well as a common framework for the training materials (so-called “Training package” - TP), will be designed by the research partners and discussed during the first progress meeting (M12, see WP1). For each of the countries involved, the TP will be composed of materials and resources in English and national languages. The TP will be finalized by M13 (and in any case before the start of the training activities in each country). Namely, the TP will be composed of three thematic training toolkits (TT) (one for each training module) each containing at least one PPT presentation in national languages and an essential bibliography (“Reading list”) useful for participants. These materials will be validated by the QAO in the context of the first Progress meeting (M12).Fond. ADAPT will, in agreement with all research partners, provide guidelines for the composition of the TP, ensuring the greatest possible uniformity in terms of minimum quality standards concerning training. All TT, organized thematically and by language, will be publicly available on the project webpage.



### T3.2

#### Delivery of training sessions at national level

The national training activities will be structured in three modules with different content, following the topics covered by the research activities of WP2:

- Module #1 (M14): Theoretical and Regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers' mental health. In particular, for each target country of the project, the reference bodies, the main features of the legislation (national and European), the collective bargaining instruments currently provided for this purpose, and the corporate responsibility in this field, will be identified and mapped.

- Module #2 (M16): Links between digitalization and mental health. In particular, the elements and conditions affecting workers' well-being in the so-called 'digital workplace' - including the effects of the use of the most advanced technological tools for monitoring work performance, linked to the use of artificial intelligence, algorithms and machine learning - will be investigated. This focus will also take into account the different categories of the workforce – differentiated for example by age, gender, job/organization characteristics, contractual arrangements, level of responsibility – and how digitalization impacts their mental health. Lastly, looking at the international evidence, it will be possible to emphasize aspects relating to the broader transformations connected with digitalization.

- Module #3 (M18): Work environment, inequalities and workers' mental health. This will focus on both the issue of 'well-being at work' and the working environment, and also on inequalities within the workforce - which can also give rise to discrimination in the workplace (not only in light of factors such as age and gender – see ILO Convention 190, 2019 - but also between workers with standard and 'atypical' contracts). A specific focus concerning environmental factors “external” to the workplace which may impact workers’ mental health (e.g., climate change) will also be provided.

Each module will be organized in a one-day training session lasting 5 hours each (3 in the morning, 2 in the afternoon).

The teaching faculty will be mainly composed by research BEN experts, but can be expanded to external lecturers on the basis of their availability in the scheduled dates, invited after they will be identified and agreed upon by partners.

The training methodologies used during each session will be aimed at stimulating exchanges and discussions among participants and at providing trainees with practical knowledge to deal with mental health issues in the workplace in their daily activities (i.e., use of fictional case simulations).

Fond. ADAPT is responsible for conducting the training session in IT; USC in ES; KU Leuven in BE; CELSI in SK; UL in SI; DCU in IE; HACETTEPE in TR.

FIM-CISL, VZW, SIPTU, OZ KOVO, SKEI, UGT-FICA, TMS will take care of the organization of 2 out of 3 of the mentioned training sessions, while 1 out of 3 training session will be organised in the premises of research BENs. Trade union BENs will in any case identify and involve training participants in their country of activity for each of the three sessions. Target participants: sectoral/territorial trade unionists and workers’ representatives on company-level.

An evaluation questionnaire assessing the quality of the training received and the skills acquired by participants will be produced by the research partners in their national languages and administered in hard copy in the last 15 minutes of each national training session. Afterwards, each research partner will be responsible for producing a summary of the results of max. 2 pages in ENG, which will be integrated in specific deliverable named Training evaluation report (D3.3 - M24) – to be drafted by FIM-CISL. The questionnaire will be structured as follows: a "standard" part concerning training quality indicators common to all modules and a tailored section depending on the specific contents of the actual training modules.

The assessment questionnaire will be validated by the QAO in the context of the first Progress meeting (M12).

Overall, training activities will be planned coherently across all countries involved thanks to the discussion concerning the TP taking place during the Progress meeting of M12 (see WP1)

Training activities will be carried out in the national languages of each target country (in BE, NL will be the working languages).

Target audience for each training module: 15 to 20 participants (per country) – total: max 140 people trained. A light lunch will be provided.

### T3.3

#### Organisation and provision of the national transnational training session

This task concerns the organization of a hybrid half-day transnational training session, to be organised by FIM-CISL in Ankara (TR) during M20, focusing on the topic of mental health risks prevention from an international perspective. In particular, this topic will be explored by:

- International/EU level experts (e.g., from the European Commission, EU-OSHA, Eurofound, WHO, ILO) to be identified by M18.
- IndustriAll professionals, who will describe their initiatives aimed at safeguarding European workers’ mental health.
- The QAO, in light of its consolidated experience in that regard.

- Additional intervention by research BEN will be decided by M18. FIM-CISL will chair the event and deal with its general organization with the support of TMS. The transnational training session’s agenda will be discussed and approved by BENs and APs during the bi-monthly meeting of M18. The agenda will be made available on the project webpage and disseminated in order to reach additional potential participants (online). The organization of this hybrid session

will contribute to expanding the target audience beyond the national training sessions: in fact, not only members of the project's trade union partners, but trade unionists and workers' representatives of the metalworking sector of all EU27 and candidate countries will be invited to participate to the session thanks to the COO consolidated network and IAE. The transnational training session will be carried out, where coherent with the actual project timeline, in conjunction with the meeting of the 2025/2026 Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area, which will take place in Turkey. After the end of the session, FIM-CISL will be responsible for producing a summary of the results of the session of max. 3 pages in ENG, which will form part of a specific deliverable named Training evaluation report (D3.3 - M24). Target audience: min. 100 training participants (max 50 in person, remainder online). 1 representative for each BEN (COO included) will travel to Ankara, together with the QAO and 1 representative from OZ KOVO (covered by CELSI budget). The transnational session will be carried out in English. Simultaneous interpretation will be provided for each target countries' languages (IT, ES, SK, SI, FR, TR, NL).

## Work package WP4 – Communication, dissemination and follow-up activities

<b>Work Package Number</b>	WP4	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Work Package Name</b>	Communication, dissemination and follow-up activities		
<b>Start Month</b>	2	<b>End Month</b>	24

### Objectives

To implement communication and dissemination activities and events in order to promote IncreMe(n)tal results and maximize the project impact towards relevant stakeholders, policymakers and the general public.

### Description

#### T4.1 Visual identity set up & Impact Amplification Plan

In order to provide the project with appropriate external identifiability, by M3 FIM-CISL will provide BENs and APs with a logo of the project and a full set of templates devoted at (1) consolidating the project branding and visual branding, (2) improving BEN and AP commitment in disseminating project results and achievements with common visual standards.

FIM-CISL, with the support of Fond. ADAPT, will also develop an Impact amplification Plan (D4.1) which will detail all communication and dissemination activities planned for the project and their potential impact. The Plan will be shared with partners by M3.

#### T4.2

IncreMe(n)tal Webpage and Twitter account setting and update

Fond. ADAPT will host the official webpage of the project, which will be created by M2 and regularly updated by Fond. ADAPT staff, in agreement with FIM-CISL as COO. All BENs will provide compulsory materials (deliverables) in due time, using project templates and approved editorial norms for their upload. The webpage will be designed in compliance with the project visual identity standards and will display the main project outputs. APs will contribute to the implementation of the "news" section of the webpage by providing relevant materials.

A Twitter account of the project will be created by Fond. ADAPT (by M3): credentials of the Twitter account will be shared with all research partners, who will manage it in 3-month-turns. A specific hashtag dedicated to the project (#IncreMENTAL\_EU) will be used to disseminate relevant project materials and outputs through the partners' main communication channels.

#### T4.3

Communication & Dissemination of IncreMe(n)tal materials and outputs (multimedia)

All BENs and APs are committed to disseminate relevant project materials and outputs through their main communication channels. Specific instructions concerning dissemination activities will be provided by FIM-CISL as WP leader to interested BENs and APs (considering their different level of involvement in the project), every time a new project material or output will be produced – coherently with the contents of the Impact and amplification plan (D4.1). Notably, partners will be asked to circulate: the research outputs (National Highlights, EU Interactive Guide; Comparative Policy Brief); the transnational training session agenda; the Final Conference agenda.

To involve all BENs and APs in these activities and make them responsible for the success of dissemination, an excel spreadsheet will be provided by FIM-CISL to all BENs and APs, which will be asked to report the evidences of main communication and dissemination activities carried out (i.e., tweets, posts online, interviews, media articles, newsletters,

events, etc.). This activity will facilitate the updating of the sections dedicated to dissemination and communication activities on the continuous reporting platform of the EC.

The dissemination of project outputs and events will benefit from the multiplier effect of Fond. ADAPT being media partner of the next EU-OSHA campaign (Safe and Healthy Work in the Digital Age, running from 2023 to 2025) and being partner of the OECD/ILO Global Deal initiative together with UGT and IAE.

Project events will (when possible) be organised in conjunction with the meeting of the 2025/2026 Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area (notably, the transnational training session of M20) - also to make the best usage of TMS premises available – but also in parallel with relevant initiatives concerning mental health organized by European and International organisations, for example World mental health day (WHO), European Mental Health week (MHE), the Endstress.eu campaign promoted by Eurocadres and ETUC in order to maximise their dissemination.

Besides these communication and dissemination initiatives, contributions summarizing the results of the research activities (namely, National Highlights - D2.1) will be written by BENs in national languages and disseminated through the ADAPT International Bulletin (2000 subscribers) and HIVA-KU Leuven newsletter (4000 subscribers). Contents in Spanish language will be also disseminated through the CIELO Laboral Newsletter (2200 subscribers).

In addition, a summary of each National Highlight will be sent by research BENs to the corresponding EU-OSHA National Focal point. 2 special issues of the ADAPT International Bulletin and the CIELO Laboral Newsletter encompassing all the Highlights will be released in M12.

The EU Interactive Guide will also be further disseminated 1) through its inclusion on the Social Europe website and newsletter in the form of an advertisement 2) during at least one session of the Metal Industry European Sectoral social dialogue committee thanks to the involvement of IAE.

A short presentation video of the EU Interactive Guide (D2.2) will be produced by DCU and launched during the Final Conference. The video, whose contents will mainly be provided by FIM-CISL, will then be uploaded on COO and Fond. ADAPT Youtube channels, and disseminated through social media accounts of the project and of each partner. The video will be made in the English language and provided with subtitles in each target countries' language (IT, ES, SK, SI, FR, TR, NL) in order to maximise its impact.

#### T4.4


##### Organisation & Delivery of IncreMe(n)tal Final Conference

The Final Conference will be organized with the aim of disseminating the outcomes of the project among relevant stakeholders. The event, organised in the hybrid format, will take place in the EESC headquarters in Brussels to potentially maximize the multiplier effect of the event. The final conference will be the occasion to launch the final research output, i.e., the European-level Interactive Guide (D2.2) and its presentation video (see T4.3). Target audience of the final conference: 50 participants. Min.1 people per BEN, AP and min. 2 COO representatives will participate in presence. The QAO will be also present: his travel and accommodation costs will be borne by COO. OZ KOVO travel expenses will be covered by CELSI.

## STAFF EFFORT

<b>Staff effort per participant</b>					
<i>Grant Preparation (Work packages - Effort screen) — Enter the info.</i>					
<b>Participant</b>	<b>WP1</b>	<b>WP2</b>	<b>WP3</b>	<b>WP4</b>	<b>Total Person-Months</b>
1 - FIM CISL	4.50	0.50	1.00	2.20	8.20
2 - FOND_ADAPT	2.30	3.10	0.80	1.80	8.00
2.1 - ADAPT	0.50	1.50	0.50	0.90	3.40
3 - USC	2.00	3.50	0.70	1.10	7.30
4 - UGT FICA	1.90	0.70	0.90	0.80	4.30
5 - KU Leuven	1.50	3.50	0.70	1.00	6.70
6 - VZW	1.50	0.80	1.00	0.70	4.00
7 - UL	1.50	4.00	0.70	1.00	7.20
8 - SKEI	1.50	0.80	0.80	0.70	3.80
9 - HACETTEPE_UNI	2.00	3.40	0.80	1.00	7.20
10 - TMS	1.80	0.70	1.20	0.80	4.50
11 - DCU	1.70	3.20	0.70	1.40	7.00
12 - SIPTU	1.60	0.50	1.10	0.60	3.80
13 - CELSI	1.70	4.00	0.80	1.00	7.50
<b>Total Person-Months</b>	26.00	30.20	11.70	15.00	82.90

## LIST OF DELIVERABLES

<b>Deliverables</b>						
<i>Grant Preparation (Deliverables screen) — Enter the info.</i>						
<i>The labels used mean:</i>						
<i>Public — fully open ( automatically posted online)</i>						
<i>Sensitive — limited under the conditions of the Grant Agreement</i>						
<i>EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision <a href="#">2015/444</a></i>						
<b>Deliverable No</b>	<b>Deliverable Name</b>	<b>Work Package No</b>	<b>Lead Beneficiary</b>	<b>Type</b>	<b>Dissemination Level</b>	<b>Due Date (month)</b>
D1.1	Administrative Package set up	WP1	1 - FIM CISL	R — Document, report	SEN - Sensitive	3
D1.2	Final Quality Assessment Report	WP1	1 - FIM CISL	R — Document, report	SEN - Sensitive	24
D2.1	IncreMe(n)tal National Highlights	WP2	2 - FOND_ADAPT	R — Document, report	PU - Public	12
D2.2	IncreMe(n)tal EU Interactive Guide	WP2	7 - UL	OTHER	PU - Public	23
D2.3	IncreMe(n)tal Comparative Policy Brief	WP2	13 - CELSI	R — Document, report	PU - Public	24
D3.1	National training sessions	WP3	1 - FIM CISL	OTHER	PU - Public	18
D3.2	Transnational training session	WP3	1 - FIM CISL	OTHER	PU - Public	20
D3.3	Training evaluation Report	WP3	1 - FIM CISL	R — Document, report	SEN - Sensitive	24
D4.1	Impact amplification plan: communication, stakeholder engagement and sustainability	WP4	1 - FIM CISL	R — Document, report	SEN - Sensitive	3
D4.2	Presentation video of the EU Interactive Guide	WP4	11 - DCU	DEC — Websites, patent filings, videos, etc	PU - Public	24

**Deliverable D1.1 – Administrative Package set up**

<b>Deliverable Number</b>	D1.1	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Deliverable Name</b>	Administrative Package set up		
<b>Type</b>	R — Document, report	<b>Dissemination Level</b>	SEN - Sensitive
<b>Due Date (month)</b>	3	<b>Work Package No</b>	WP1

<b>Description</b>
Provision of the final version of the administrative related documents and templates including Project Roadmap, signed Consortium Agreement, Data & Ethics Management Policy (max 20 pages). Language: English

**Deliverable D1.2 – Final Quality Assessment Report**

<b>Deliverable Number</b>	D1.2	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Deliverable Name</b>	Final Quality Assessment Report		
<b>Type</b>	R — Document, report	<b>Dissemination Level</b>	SEN - Sensitive
<b>Due Date (month)</b>	24	<b>Work Package No</b>	WP1

<b>Description</b>
PDF document of ca. 15 pages to be drafted by M23 and validated during the second progress meeting (M24). Contents: final evaluation of project outcomes and results. Language: English

**Deliverable D2.1 – IncreMe(n)tal National Highlights**

<b>Deliverable Number</b>	D2.1	<b>Lead Beneficiary</b>	2 - FOND_ADAPT
<b>Deliverable Name</b>	IncreMe(n)tal National Highlights		
<b>Type</b>	R — Document, report	<b>Dissemination Level</b>	PU - Public
<b>Due Date (month)</b>	12	<b>Work Package No</b>	WP2

<b>Description</b>
7 Pdf documents (around 25 pages each). National languages.

**Deliverable D2.2 – IncreMe(n)tal EU Interactive Guide**

<b>Deliverable Number</b>	D2.2	<b>Lead Beneficiary</b>	7 - UL
<b>Deliverable Name</b>	IncreMe(n)tal EU Interactive Guide		
<b>Type</b>	OTHER	<b>Dissemination Level</b>	PU - Public
<b>Due Date (month)</b>	23	<b>Work Package No</b>	WP2

<b>Description</b>
Interactive resource (about 20 pages). EU27 languages + Turkish (automatic translation)

### Deliverable D2.3 – IncreMe(n)tal Comparative Policy Brief

<b>Deliverable Number</b>	D2.3	<b>Lead Beneficiary</b>	13 - CELSI
<b>Deliverable Name</b>	IncreMe(n)tal Comparative Policy Brief		
<b>Type</b>	R — Document, report	<b>Dissemination Level</b>	PU - Public
<b>Due Date (month)</b>	24	<b>Work Package No</b>	WP2

<b>Description</b>
PDF document (around 15 pages). English

### Deliverable D3.1 – National training sessions

<b>Deliverable Number</b>	D3.1	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Deliverable Name</b>	National training sessions		
<b>Type</b>	OTHER	<b>Dissemination Level</b>	PU - Public
<b>Due Date (month)</b>	18	<b>Work Package No</b>	WP3

<b>Description</b>
Three one-day in-person training sessions lasting 5 hours each (3 in the morning, 2 in the afternoon) organized in each target country. Training activities will be carried out in the national languages of each target country. Target audience for each training module: 15 to 20 participants (per country). Agendas to be made available on the project webpage in advance to the training delivery. A PDF document encompassing all national-level training agendas will be uploaded on the EC continuous reporting section.

### Deliverable D3.2 – Transnational training session

<b>Deliverable Number</b>	D3.2	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Deliverable Name</b>	Transnational training session		
<b>Type</b>	OTHER	<b>Dissemination Level</b>	PU - Public
<b>Due Date (month)</b>	20	<b>Work Package No</b>	WP3

<b>Description</b>
One hybrid half-day transnational training session, to be organised by FIM-CISL and TMS in Ankara. Target audience: 100 participants (max 50 in presence, the others online). Language: English + simultaneous interpretation to be provided in target countries' languages (IT, SP, SK, SI, FR, TR, NL). Agenda to be made available on the project webpage in advance to the training delivery. The PDF document will be uploaded on the EC continuous reporting section.

### Deliverable D3.3 – Training evaluation Report

<b>Deliverable Number</b>	D3.3	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Deliverable Name</b>	Training evaluation Report		
<b>Type</b>	R — Document, report	<b>Dissemination Level</b>	SEN - Sensitive
<b>Due Date (month)</b>	24	<b>Work Package No</b>	WP3

Description	
PDF document of max 15 pages composed of summaries of the results of national training sessions drafted by research BENs + summary of the results of the transnational training session drafted by FIM-CISL. Language: English	

### Deliverable D4.1 – Impact amplification plan: communication, stakeholder engagement and sustainability

<b>Deliverable Number</b>	D4.1	<b>Lead Beneficiary</b>	1 - FIM CISL
<b>Deliverable Name</b>	Impact amplification plan: communication, stakeholder engagement and sustainability		
<b>Type</b>	R — Document, report	<b>Dissemination Level</b>	SEN - Sensitive
<b>Due Date (month)</b>	3	<b>Work Package No</b>	WP4

Description	
PDF document (about 5 pages). Language: English	

### Deliverable D4.2 – Presentation video of the EU Interactive Guide

<b>Deliverable Number</b>	D4.2	<b>Lead Beneficiary</b>	11 - DCU
<b>Deliverable Name</b>	Presentation video of the EU Interactive Guide		
<b>Type</b>	DEC — Websites, patent filings, videos, etc	<b>Dissemination Level</b>	PU - Public
<b>Due Date (month)</b>	24	<b>Work Package No</b>	WP4

Description	
Presentation video of the Interactive Guide (5 min max) to be launched during the Final Conference and later uploaded on COO and Fond. ADAPT Youtube channels, and disseminated through social media accounts of the project and of each partner. Language: English + subtitles in each target countries' language (IT, ES, SK, SI, FR, TR, NL)	



## LIST OF MILESTONES

<b>Milestones</b>					
<i>Grant Preparation (Milestones screen) — Enter the info.</i>					
<b>Milestone No</b>	<b>Milestone Name</b>	<b>Work Package No</b>	<b>Lead Beneficiary</b>	<b>Means of Verification</b>	<b>Due Date (month)</b>
1	Kick-off meeting	WP1	1 - FIM CISL	Signed presence list and online attendance verification and recording of streamed event	2
2	1st Progress meeting and 1st Quality Check	WP1	3 - USC	Signed presence list and online attendance verification	12
3	2nd Progress meeting and Final Quality Assessment	WP1	1 - FIM CISL	Signed presence list and online attendance verification	24
4	Transnational training session	WP3	1 - FIM CISL	Signed presence list, online attendance verification, recording of streamed event (English version).	20
5	Final Conference	WP4	1 - FIM CISL	Signed presence list and online attendance verification and recording of streamed event.	24

## LIST OF CRITICAL RISKS

<b>Critical risks &amp; risk management strategy</b>			
<i>Grant Preparation (Critical Risks screen) — Enter the info.</i>			
<b>Risk number</b>	<b>Description</b>	<b>Work Package No(s)</b>	<b>Proposed Mitigation Measures</b>
1	Limited timeframe to fulfil the tasks (Medium probability/High impact)	WP4, WP1, WP3, WP2	Creation of a detailed timeline of all project activities (also shared via online calendar accessible by all BENs; monitoring of task implementation in bimonthly meetings and calls + Progress Meetings; flexible arrangements between BENs to support respective work and

<b>Critical risks &amp; risk management strategy</b>			
<i>Grant Preparation (Critical Risks screen) — Enter the info.</i>			
<b>Risk number</b>	<b>Description</b>	<b>Work Package No(s)</b>	<b>Proposed Mitigation Measures</b>
			ensure the continuation of the project and the achievement of its objectives; partial overlap in specific expertise among BENs, so that if any consortium member is unable to perform its task in a WP or part of it, this task could likely be taken over by one of the other BENs
2	Overcoming allocated working time to fulfil the tasks (Low probability/High impact)	WP4, WP3, WP2	Agreement between all BENs of allocated working time, during the submission phase; possibility to transfer working time for one task to another if needed (budget flexibility); involvement of experienced researchers and project managers in each BENs, with expertise with multiple and overlapping deadlines; provision of Gantt Chart and internal interim deadlines at the beginning of the project and regularly updated at the start of each task.
3	Rising inflation (Medium probability/Low impact)	WP4, WP3, WP2	Lump sums were used in the budget following EC guidelines; quotation of the goods and services to be purchased on the basis of their real costs in the different countries rounded up in the budget definition; Financial stability of selected BENs; plan to replace physical events with online activities; experience of all BENs in the conduction of fruitful online activities; plan to quickly relocate project budget to achieve the best impact through online activities.
4	Partners related risks – underperforming, leaving the project, key-personnel temporarily not available, etc. (probability low – impact high)	WP4, WP3, WP1, WP2	Larger teams involved in the project on behalf of all BENs. Bi-monthly online meetings to identify similar issues. Flexible project management structure. Moreover, All consortium members have the facilities and expertise to individually execute the tasks as described in paragraph 4. For most of the tasks, there is a complementarity as well as a partial overlap in specific expertise, such that should any consortium member be unable to perform its task in a WP or part of it, this task could likely be taken over by one of the other consortium members.
5	Linguistic barriers (critical risk) (probability high– impact high)	WP4, WP1, WP3, WP2	Interpretation services, written texts translations foreseen where possible, within the limits imposed by reasons of economic efficiency and sustainability of the project. National training sessions delivered directly in national languages.
6	Collaboration and communication issues (probability low – impact high)	WP4, WP1, WP3, WP2	Bi-monthly online meetings Involvement of the experienced project coordinator to the management of such issues Previous fruitful collaborations between BENs and between BENs and COO
7	Low stakeholder participation (for interviews and questionnaires) (probability low – impact high)	WP3, WP2	Engagement of the stakeholders from M3 Reachable targets Reliance on the BENs and APs networks
8	Low participation of trainees to national	WP3	Agreement reached between research partners, COOs and TU BENs and AP (OZ KOVO)

<b>Critical risks &amp; risk management strategy</b>			
<i>Grant Preparation (Critical Risks screen) — Enter the info.</i>			
<b>Risk number</b>	<b>Description</b>	<b>Work Package No(s)</b>	<b>Proposed Mitigation Measures</b>
	and transnational training sessions (probability medium– impact high)		when writing this proposal on the minimum and maximum number of trainees per training session. Active diffusion of date and time of the national training sessions by trade union BENs among their members. Transnational training session organised in hybrid mode in order to facilitate participation. Incentives for participation offered to participants in terms of competences increase through training and opportunity to take part in further high-level exchange opportunities (transnational final Conference).
9	Low quality of research outputs and training materials (probability medium– impact medium)	WP2	Periodic evaluation of project outputs (National Highlights; training materials; European-level Interactive Guide) during in-person Progress meetings; Appointment of a QAO (Quality Assessment Officer).



# **European Social Fund+ (ESF) Social Prerogatives and Specific Competencies Lines (SocPL)**

## **Application Form**

**Administrative Forms (Part A)  
Technical Description (Part B)**

(ESF and SOCPL Standard)

**Version 1.0  
25 February 2021**

## **IMPORTANT NOTICE**

### **What is the Application Form?**

The Application Form is the template for EU grants applications; it must be submitted via the EU Funding & Tenders Portal before the call deadline.

The Form consists of 2 parts:

Part A contains structured administrative information

Part B is a narrative technical description of the project.

Part A is generated by the IT system. It is based on the information which you enter into the Portal Submission System screens.

Part B needs to be uploaded as PDF (+ annexes) in the Submission System. The templates to use are available there.

### **How to prepare and submit it?**

The Application Form must be prepared by the consortium and submitted by a representative. Once submitted, you will receive a confirmation.

#### **Character and page limits:**

page limit normally **70** pages (unless otherwise provided in the Call document)

supporting documents can be provided as an annex and do not count towards the page limit

minimum font size — Arial 9 points

page size: A4

margins (top, bottom, left and right): at least 15 mm (not including headers & footers).

Please abide by the formatting rules. They are NOT a target! Keep your text as concise as possible. Do not use hyperlinks to show information that is an essential part of your application.

If you attempt to upload an application that exceeds the specified limit, you will receive an automatic warning asking you to shorten and re-upload your application. For applications that are not shortened, the excess pages will be made invisible and thus disregarded by the evaluators.

**Please do NOT delete any instructions in the document. The overall page limit has been raised to ensure equal treatment of all applicants.**

## **ADMINISTRATIVE FORMS (PART A)**

*Part A of the Application Form must be filled out directly in the Portal Submission System screens.*

## TECHNICAL DESCRIPTION (PART B)

### COVER PAGE

Part B of the Application Form must be downloaded from the Portal Submission System, completed and then assembled and re-uploaded as PDF in the system.

**Note:** Please read carefully the conditions set out in the Call document (for open calls: published on the Portal). Pay particular attention to the award criteria; they explain how the application will be evaluated.

PROJECT	
<b>Project name:</b>	Increasing Metalworkers' representatives' Awareness and Skills on Mental Health Protection & Promotion in the Workplace
<b>Project acronym:</b>	IncreMe(n)tal
<b>Coordinator contact:</b>	Massimiliano Nobis ( <a href="mailto:m.nobis@cisl.it">m.nobis@cisl.it</a> ), FIM-CISL

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### PROJECT SUMMARY

**Project summary**

One of the most pivotal topics arising in today's scientific debate concerning the world of work is the **significant impact of employment and working conditions on workers' mental health and general well-being** – also in light of the fact that, after a period of doubts and resistance, **mental health risks are today considered equally severe to physical safety and health risks** (EU-OSHA, 2023).

The COVID-19 pandemic contributed to shedding light on this correlation, showing **how many workers experienced increased stress, anxiety, and burnout following the changes in their work environment and work organization, strongly impacted by the diffusion of remote work and increased social isolation** (IZA, 2022).

However, workers' mental health appears also at risk in a post-pandemic world. **New forms of work organization and the introduction of advanced technological tools in the workplace** (such as those powered by Artificial Intelligence and Big Data), for example seem prone to affecting workers' mental health: despite the scarcity of data regarding the connection between digitization and mental health, some studies suggest **that the increasing use of technology in the workplace could lead to increased stress and job insecurity** (Berg-Beckhoff et al., 2017). Various studies emphasize the importance of **prioritizing workers' mental health and the need for better research and regulatory initiatives to address psychosocial risks in the workplace, particularly as new forms of work organization and technology continue to emerge** (Takenori, 2022)

In addition, it is important to note that psychosocial risks in the workplace can disproportionately affect certain groups of workers, such as **those employed with atypical contractual arrangements and those who have experienced workplace discrimination due to external factors such as their race, age, gender, sexual orientation** (TUC, 2018). Therefore, European institutions and scientific literature underline how **taking into account the presence of workplace inequalities appears crucial when proposing regulations aimed at protecting workers' mental health** (European Parliament 2020, Graveling et al. 2020)

As for what concerns possible solutions to these issues, numerous studies have underlined how, **together with the national and supranational legislators, social partners at both the national and European level have a crucial role in pursuing the improvement of workers' mental health**. Namely, **workers seem to benefit when mental health risks prevention initiatives are characterized by a participative approach involving employees themselves and their representatives** (Wels, 2020, Mureau, 2021).

In light of the abovementioned elements, **IncreMe(n)tal** aims at providing **quality training to trade unionists and workers' representatives in the metalworking industry in 7 target countries and at transnational level, in order to increase their awareness concerning emerging psychosocial risks connected to work environment and work organisation, but also regarding the strategic role of social dialogue and collective bargaining initiatives in protecting and promoting workers' mental health**. This will be achieved through

- (1) **the close cooperation between “research” BENs, experts, trade unions (TU) and APs and through the delivery of 22 training sessions, organised thematically, taking into account sectoral and national peculiarities but also the international context and practices in the field;**
- (2) **the implementation of communication and dissemination activities designed to fit in with other European and international initiatives and gatherings organised on the theme of risk prevention and mental health promotion in the workplace.**

**1. RELEVANCE****1.1 Background and general objectives****Background and general objectives**

*Describe the background and rationale of the project.*

*How is the project relevant to the scope of the call? How does the project address the general objectives of the call? What is the project's contribution to the priorities of the call?*

As recently highlighted by the European Economic and Social Committee, **promoting mental health is in the interest of society as a whole**. In working life, the promotion of psychological well-being is crucial as **mental health problems can result in lower work productivity, performance, and increased absenteeism, while good mental health is associated with better motivation and productivity** (EESC, 2022, OECD, 2022). Therefore, the development of appropriate policies and actions to prevent work-related psychosocial risks should be promoted at the European and national level, also through the adoption of an **organizational, participative and collective** approach, in line with the European OSH strategy (EU-OSHA, 2023): **integrated approaches to occupational safety and health prevention and the diffusion of a healthy workplace culture are in fact proven to contribute to the success of**



**workplace health-promoting programmes** (OECD, 2022) and may also be directed at **improving work-related outcomes** (WHO, ILO, 2022).

Considering the mentioned inputs from EU and international institutions, **trade unionists and workers' representatives should acquire adequate skills in the prevention, promotion and management of psychosocial risks in the workplace**. They should also be equipped with appropriate knowledge on **how to contribute to the creation of a work environment and to working activities' organization in a way that ensures workers' well-being** (Mureau, 2021, TUC, 2018), for example **by putting those topics on the agenda of collective negotiations and social dialogue initiatives**.

**Raising awareness about the importance of the protection and promotion of mental health in the workplace among trade unionists and workers' representatives is the main goal of IncreMe(n)tal**. By deepening the issue concerning the consequences of emerging technologies (e.g., powered by Big Data and AI) new work organization models (e.g., platform work and remote work), external environmental factors (e.g. climate change) on mental health (Takenori, 2022), but also their different impacts on certain categories of workers based on their age, gender, and type of contractual arrangement (European Parliament 2020, Graveling et al. 2020, FEPS 2023), IncreMe(n)tal **aims at improving collective bargaining and social dialogue initiatives at sectorial level in this field and promoting the adoption of collective solutions for the protection of workers' mental health in a fast-changing world**.

## 1.2 Needs analysis and specific objectives

### Needs analysis and specific objectives

*Describe how the objectives of the project are based on a sound needs analysis in line with the specific objectives of the call. What issue/challenge/gap does the project aim to address?*

*The objectives should be clear, measurable, realistic and achievable within the duration of the project. For each objective, define appropriate indicators for measuring achievement (including a unit of measurement, baseline value and target value).*

The **EU Strategic Framework for Health and Safety at Work 2021-2027** emphasizes the **need to focus on psychosocial risks and create an inclusive work environment** to achieve health and safety goals. The emerging **attention on mental health disorders affecting workers has also been recently highlighted by EU-OSHA**, which underlines how factors like shifts in work tasks and workforce between sectors, technological progress and the development of higher skill levels have led to a **shift of risks to psychosocial and emotional challenges** - documented by the growing percentage of workers who report difficult clients (60%), long or irregular working hours (22%), and poor communication in the organisation (18%) (EU-OSHA 2023). On the international level, **the importance of addressing mental health in the workplace has been further highlighted by the joint efforts of the ILO and WHO**, who published a **dual-signature document aimed at supporting stakeholders in taking action in that sense** (WHO, ILO, 2022). Moreover, **the dissemination of multi-stakeholder information and guidance (e.g., developed by governments, trade unions and employer associations), was recently identified as facilitating the promotion of health and well-being at the workplace and increasing awareness and understanding concerning mental health issues** (OECD, 2022).

The IncreMe(n)tal project fits within this framework, conceiving workers' mental health protection both as a challenge and an opportunity for social partners to collectively shape the future of work, and **aiming to provide trade unions with the proper skills and knowledge to effectively act in this context**. Notably, **effective social dialogue initiatives and collective bargaining over the management and prevention of psychosocial risks affecting workers can only be achieved if workers' representatives and trade unionists in different countries are adequately trained and get a deep knowledge of National and European OSH legislation in this field as well as of collective best practices performed across Europe at the national, transnational, sectoral and company-level**.

The information and training activities concerning the prevention, promotion and/or management of psychosocial risks foreseen by the IncreMe(n)tal project are thus prerequisites to spur a more proactive attitude by labour representation on the matter, **in line with the call's objective of strengthening of the capacity of workers' organizations to address challenges related to changes in employment, labour, and social dialogue**. Moreover, through the research activities preliminary to the training activities, the Consortium aims **at filling existing gaps in the knowledge about the impact of new technologies, new ways of organizing work, and other external factors such as climate change on mental health and workers' well-being**, also taking into account their uneven impact on workers with different characteristics, based on gender, age, job characteristics, and contractual arrangements.

Coherently with this framework, the specific objectives of this project include:

- To conduct of in-depth research on the most recent scientific findings on the impact of new technologies and job insecurity, as well as work environment and work organization, on workers' mental health**. The research activities, characterised by an interdisciplinary and multi-method approach, will be based on original field work and up-to-date scientific literature and institutional reports from the most important European and international bodies and organizations, and will focus on the **prevention and management of psychosocial risks in companies of the metalworking sector**.
- To draft user-friendly 7 country-specific Reports (IncreMe(n)tal National Highlights) and a European-level Interactive Guide directed at trade unionists and workers' representatives,**

providing information on **how to prevent, promote and manage potential mental health disorders arising among workers.**

3. Building on the findings of the research activities, to **organize and carry out specific training sessions (22) thematically organised, concerning the aforementioned issues, aimed at raising awareness among trade unionists and workers' representatives** about the topic of mental health protection and promotion, equipping them with strategic subject matter skills, whilst **stimulating the circulation of European and national social dialogue and collective bargaining best practices.**

4. To **foster dialogue between different workers' organisations in Europe and in Candidate Countries (TR)** regarding mental health risks prevention, promotion and management to **promote a consistent and proactive approach to the issue.**

5. To **promote collaboration between scholars and practitioners on the topic of mental health in the workplace**, considering the persistent lack of knowledge of the issue among trade unionists.

6. Make the results of the project dialogue, multiplying their impact, with other initiatives organised at European level on the topic of mental health in the workplace.

### 1.3 Complementarity with other actions and innovation — European added value

#### Complementarity with other actions and innovation

*Explain how the project builds on the results of past activities carried out in the field and describe its innovative aspects. Explain how the activities are complementary to other activities carried out by other organisations.*

*Illustrate the European dimension of the activities: trans-national dimension of the project; impact/interest for a number of EU countries; possibility to use the results in other countries, potential to develop mutual trust/cross-border cooperation among EU countries, etc.*

*Which countries will benefit from the project (directly and indirectly)? Where will the activities take place?*

Firstly, the transnational dimension of IncreMe(n)tal is ensured by the **composition of its partnership**: in order to achieve its objectives, IncreMe(n)tal will indeed involve organisations operating in **different Member States and a candidate country**. The COO of the project is **FIM-CISL (IT)**, while its BENs are **Fond. ADAPT (IT)** and its AE (**ADAPT**), **DCU (IE)**, **CELSI (SK)**, **University of Ljubljana (UL) (SI)**, **USC (ES)**, **KU Leuven (BE)**, **HACETTEPE (TR)**, **VZW (BE)**, **SIPTU (IE)**, **SKEI (SI)**, **UGT-FICA (ES)**, **TMS (TR)**. **IndustriAll Europe** and **OZ KOVO (SK)** will participate as APs.

The geographical coverage feature has been a fundamental criterium vis à vis the partnership composition: the presence of organisations localised in different areas of the European Union (Slovenia and Slovakia - Eastern Europe; Italy and Spain - Southern Europe; Belgium and Ireland - Northern Europe) will grant an **adequately broad coverage of research and dissemination activities and to encompass different industrial relations systems**. The presence of organisations situated in a candidate country (Turkey) will provide additional elements so as to deepen the analysis of the project topics.

The European and transnational dimension will also be enhanced, on the one hand, by the participation of IndustriAll Europe as one associate organisation and, on the other hand, by the coverage of the training and dissemination activities, which goes beyond the limits of the partners' countries. While the "bulk" of training activities will be provided in **Belgium, Italy, Slovakia, Slovenia, Ireland, Spain and Turkey**, the foreseen **transnational training session (M20), focused on providing a European-level perspective on the topic of mental health risks prevention and promotion in the workplace, is aimed at broadening the project impact also beyond the mentioned countries**: its hybrid format will namely allow the participation of EU27 trade unionists and workers' representatives, together with the composition of its teaching faculty, belonging to European-level and international organisations and experts (i.e. [Mental Health Europe](#)). Moreover, the session will be organized in the context of the **Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area**.

The same goal will be reached by the **translation of key project outputs (EU Interactive Guide - D2.2 and the Final Conference)** - focused on European-level initiatives on the topic of mental health risks prevention in the workplace - **in EU27 languages and Turkish** (through an automated translation software – see 3.2). As for the final conference, it will be organised at the EESC.

IncreMe(n)tal aims at increasing trade union's awareness concerning their role in safeguarding workers' mental health and preventing emerging psychosocial risks connected to work environment and work organisation. While other actions financed under this budget line were aimed at training trade unionists on the challenges linked to flexible work organisation (including health and safety issues), **this would be the first action financed on this funding line specifically focused on training trade unionists on the prevention and handling of workers' mental health risks.**

In more detail, the transnational dimension of Increme(n)tal is particularly fruitful for the project because the room for action in the prevention and handling of mental health risks in the workplace depends heavily on three country-specific factors: **the attention dedicated by national OSH legislation to the topic of workers' mental health; the role and prerogatives in this field acknowledged to trade unions and workers' representatives by the national regulatory framework; the level of awareness of social partners concerning this challenge and their consequent ability to manage it**. Therefore, the project brings together a number of countries, having considered their different OSH legislation and the various

role already played by social partners in this field: IncreMe(n)tal will thus make possible to compare the impact of the mentioned factors and, even more importantly, to **promote the sharing of information and knowledge among trade unions from different countries in an effort to foster mutual cooperation and learning**. Except for national training sessions, **the working, communication and dissemination language will be English**. Interpreters will be provided when necessary, during transnational events (KoM; transnational training session; Final Conference) to ensure participants' fruition of contents.

**As with regard to the complementarity with other actions, project events will (when possible) be organised in conjunction with the meeting of the 2025/2026 Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area** (notably, the transnational training session of M20) but also **in parallel with relevant initiatives concerning mental health organized by European and International organisations, for example World mental health day (WHO, October 10<sup>th</sup> 2024 and 2025), European Mental Health week (MHE, May 2024 and 2025), the Endstress.eu campaign promoted by Eurocadres and ETUC, in order to maximise their dissemination**. Finally, the final research outputs will be also disseminated during 2025 session/s of the **Metal Industry European Sectoral social dialogue committee**.

## 2. QUALITY

### 2.1 Concept and methodology

#### Concept and methodology

*Outline the approach and methodology behind the project. Explain why they are the most suitable for achieving the project's objectives.*

Firstly, beyond the transnational dimension (see § 1.3), **IncreMe(n)tal adopts a sectoral perspective, given that the research and training activities will only be focused on the metalworking sector** - where all TU BENs are currently active. The selection of only one sector of reference is aimed at **deepening the analysis on its proper dynamics, especially with reference to the kind of work environment and work organisation models which might impact workers' mental health**.

The partners of the consortium will jointly achieve the objectives following the work packages scheme as specified in the following sections.

Moreover, element of particular originality -as described in Figure 1- the project is characterised by a strong synergy and complementarity between research and training activities and, therefore, exchange and interaction between research BENs and TUs. The project foresees specific research activities preceding the delivery of the training. These activities are aimed at **providing the background information supporting training activities and constitute the main rationale beyond the involvement of research-side BENs within the consortium**. These activities will be developed through qualitative methods including **desk research** (especially concerning the analysis of relevant OSH provisions and CLAs), a **questionnaire directed at workers** (aimed at gathering inputs concerning the level of awareness on their rights and options for the protection of their mental health) and **interviews to sectoral trade unionists, companies (e.g., employers/HR managers) and workers' representatives** (to better identify best practices of collective bargaining both at national and European level and investigating the social dialogue dimension in workplaces).

**The research activities, carried out in each country covered by the project** (where at least one BEN is present), **will result in 7 National Highlights (one per country). The Highlights will constitute the main background source for the delivery of the training toolkit and materials packages** (see Task 3.1). This is for guaranteeing common standards (in terms of educational resources, data and information) in the subsequent delivery of the training in each of the seven countries where the courses will take place. In order to ensure the necessary degree of homogeneity in terms of content, structure and teaching resources, the ADAPT Foundation is appointed as the coordinator of the research-side BENs and the involvement of an external expert (QAO) has also been envisaged.

**With reference to the delivery of National training sessions, which is one of the key objectives of the present proposal, three 5-hour classroom-taught sessions are foreseen**. Each training session will be focused on a specific aspect concerning the topic of workers' mental health, namely **1) regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers' mental health 2) links between workplace digitalization and workers' mental health; 3) workplace environment, inequalities and workers' mental health**. Overall, training activities will be planned coherently across all countries involved and organised jointly by research BENs and trade union BENs and APs active in each country.

Moreover, **trade unionists and workers' representatives involved the national training sessions will participate in a hybrid transnational training session (M20), focusing on project topics from a European and international perspective, and which will see the involvement of IndustriAll professionals, Mental Health Europe representatives, members of international organizations, and one an external expert with recognised international experience in the field**.

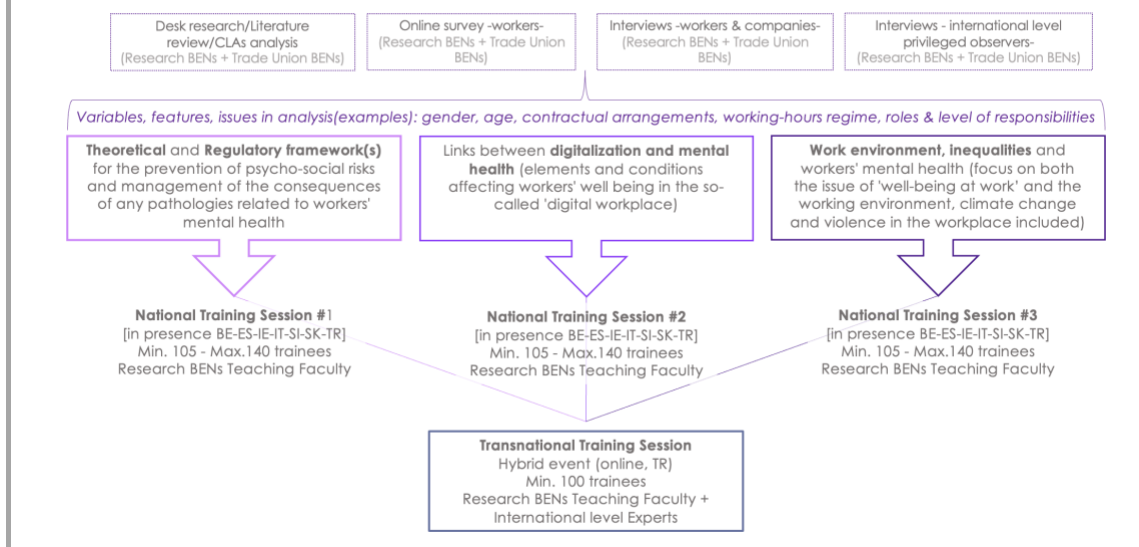
As mentioned above, considering the international scope of the project and in order to guarantee the highest quality standards with reference to the different stages and products of the research and training activities, the partnership considered it appropriate to identify and involve, already at the time of writing this proposal, a Quality Assessment Officer (QAO): **Iván Williams Jiménez, Independent Researcher (Technical expert and independent researcher with UN -ILO- and EU bodies)** – who has already been contacted and has adhered to be part of the project (if awarded).

The transnational training session will be open to participation to trade unionists and workers' representatives coming from EU27 countries, Turkey and other candidate countries.

At the end of the project and as a follow-up action to the training sessions, **in order to ensure that trade unions and workers' representatives in Europe and candidate countries are aware of the project results and will make use of the EU Interactive Guide** (also encompassing information gathered during the national and transnational training sessions), **this deliverable will be presented during the projects' Final conference**. Moreover, the Interactive Guide, produced in English, will also be translated into EU27 official languages and Turkish (see § 3.2) and made available on the project webpage. Lastly, **the project webpage** - which will be accessible for at least 3 years after the completion of the project, **will make available to the public, besides the Guide, also the National Highlights (D2.1)**, which will serve as **informative tools illustrating the main features of the 7 target countries** (6 Member states and Turkey) **in terms of regulatory framework concerning mental health protection in the workplace and insights into existing social dialogue best practices on the topic and all other resources and materials produced during the project**.

**Figure 1**

**IncreMe(n)tal Project: thematic insights and complementarity between research and training activities.**



## 2.2 Consortium set-up

### Consortium cooperation and division of roles (if applicable)

Describe the participants (Beneficiaries, Affiliated Entities and Associated Partners, if any) and explain how they will work together to implement the project. How will they bring together the necessary expertise? How will they complement each other?

In what way does each of the participants contribute to the project? Show that each has a valid role and adequate resources to fulfil that role.

**Note:** When building your consortium you should think of organisations that can help you reach objectives and solve problems.

The IncreMe(n)tal Consortium meets the following criteria: a) represents a specific industry in the economy, namely the metalworking sector; b) its Partners are able to involve relevant stakeholders at national and international level; c) its Partners have already carried out (or are committed in, since as for their statute and mission) research activities in the sector and with reference to OSH issues; d) its Partners work in a structured and continuous way. During the Consortium building activities, Partners have been asked both to explain and share their staff expertise and competencies and to propose and agree the tasks to be involved with in the Project. **The partnership will consist of the leading applicant FIM-CISL, 6 Research beneficiaries (Fond. ADAPT (IT), DCU (IE), CELSI (SK), UL (SI), USC (ES), KU Leuven (BE), HACETTEPE (TR)), 6 trade union beneficiaries (VZW (BE), SIPTU (IE), SKEI (SI), UGT-FICA (ES), TMS (TR)) and 2 associate organisations (IndustriAll Europe, OZ KOVO (SK)) and one affiliated entity (ADAPT (IT)).** Research and TU BENs

will contribute equally to the implementation of the project on the basis of their specific features and areas of expertise.

**With reference to the coordination role of BEN research, it was entrusted to Fondazione ADAPT by reason of its involvement in the Consortium of a Horizon2020 project concerning mental health in the workplace ([The European Platform to Promote Wellbeing and Health in the workplace \(EMPOWER\)](#)). Annex 4 of Part B provides a complete overview of BENs previous projects.**

**FIM-CISL, union that can draw on consolidated experience in managing projects of this type, as COO, will manage the project during its whole duration by coordinating all partners through the organisation of the partners' bimonthly meetings and Progress meetings.** FIM-CISL will also be in charge of the task of organising the Kick-off Meeting, to be held in Rome, the transnational training session, to be held in Ankara (with the support of TMS) and the Final Conference, to be held in the EESC headquarters, in Brussels. FIM-CISL will also play a coordinating and facilitating role in the **organisation of the national and transnational training sessions carried out during the project. FIM-CISL will also take a coordinating role as for what concerns the communication activities foreseen by the project**, providing BENs and APs with a logo of the project and a full set of templates and the drafting of the Impact amplification plan: communication, stakeholder engagement and sustainability (D4.1).

During the research phase, under the coordination of Fond. ADAPT, **research BENs (Fond. ADAPT, DCU, CELSI, UL, USC, KU Leuven, HACETTEPE) will 1) administer a questionnaire and interviews respectively to workers and sectoral trade unionists, workers' representatives and companies of their countries' metalworking sector 2) conduct a desk research concerning mental health risks prevention in their country 3) use data collected through phases 1) and 2) to draft a National Highlight which will constitute part of the background material of subsequent training activities 4) draft the chapter of the Comparative Policy Brief (D2.3) concerning their country of activity.**

Namely, Fond. ADAPT is responsible for carrying out these activities for IT; USC for ES; KU Leuven for BE; Celsi for SK; UL for SI; DCU for IE; HACETTEPE for TR. In addition to those activities, Fond. ADAPT will be responsible for drafting the questionnaire and interview outlines, to be approved by all partners.

In addition, in order to ensure a fair distribution of responsibilities among the beneficiaries, following decisions taken jointly at the writing stage of this proposal, it was agreed that: KU Leuven will conduct interviews with members of European-level/international representative organisations (e.g., IndustriAll Europe; CEEMET; ILO). UL will also be in charge of drafting the final project research output, (D2.2), with the support of Fond. ADAPT. Lastly, CELSI will coordinate the drafting of the Comparative Policy Brief and write an additional chapter comparing the results obtained by other research BENs.

**Research BENs will then compose the teaching faculty of national training sessions (divided into three 5-hour modules) directed at trade unionists and workers' representatives in their country of activity.** Namely, Fond. ADAPT is responsible for carrying out this activity in IT; USC in ES; KU Leuven in BE; Celsi in SK; UL in SI; DCU in IE; HACETTEPE in TR. The materials used during these sessions ("training toolkit") will be drafted by the same BENs, building on the templates provided by Fond. ADAPT and the results from their research activities. In addition, with the aim of a fair distribution of responsibilities and activities, but also so that trainees can experience different teaching contexts, it was envisaged that research BENs will host at least 1 of the three national training sessions in their premises (with the sole exception of the training in Belgium, where all sessions will be held at the union partner's premises for cost-effectiveness and logistical reasons).

With regard to dissemination activities, **research BENs will 1) participate to the management and updating of the projects' Twitter account 2) draft articles and contributions summarizing the results of the research phase to be disseminated via their institutional newsletters.**

In addition to those activities, Fond. ADAPT will 1) set up the project webpage and Twitter account 2) curate a special issue of the ADAPT Bulletin dedicated to the project. DCU, in collaboration with FIM-CISL, will produce a short presentation video of the EU Interactive Guide (D2.2) to be launched during the projects' Final Conference (M24). USC will disseminate project outputs through the **CIELO Laboral Newsletter**. CELSI will publish the Comparative Policy Brief on its website and contribute to its communication and dissemination.

During the research phase, **COO (FIM-CISL), trade union BENs (VZW, SIPTU, SKEI, UGT-FICA, TMS) and AP (OZ KOVO) will instead 1) facilitate the diffusion of the questionnaire among workers active in their country's metalworking sector 2) provide research BENs with suitable interviewees and materials (CLAs, trade union guidelines etc.) to implement the desk research 3) validate the National Highlights and the EU Interactive Guide before their publication.**

They will also be in charge of the **organisation of 2 out of 3 national training sessions (3 out of 3 for VZW) conducted in their country of activity and of the identification of a suitable number of participants to the national training sessions (D3.1) and the transnational training session (D3.2).** **Members of IndustriAll Europe** will participate in the KoM and Final Conference, and form part of the **teaching faculty of the transnational training session.**

Lastly, **COO, BENs and APs will all collaborate in the dissemination of project outputs through their webpages and social media accounts and provide feedback and inputs regarding National Highlights and the EU Interactive Guide.**

### 2.3 Project teams, staff and experts

<b>Project teams and staff</b>		
<p><i>Describe the project teams and how they will work together to implement the project.</i></p> <p><i>List the staff included in the project budget (budget category A) by function/profile (e.g. project manager, financial manager, junior/senior expert, junior/senior advisor, trainers/, operational personnel, technical personnel, administrative personnel, communication personnel etc. and describe briefly their tasks. Provide CVs of all key actors (if required).</i></p>		
Name and function	Organisation	Role/tasks/professional profile and expertise
<a href="#">Massimiliano Nobis</a> (Project Manager)	FIM-CISL (Federazione Italiana Metalmeccanici)	<p>National secretary of the Italian Metalworkers' Federation since 2020. His main areas of activity are welfare, vocational and trade union training, Industry4.0, labour market analysis. He is the President of the sectoral Health Fund "Metasalute" since 2022.</p> <p>As PM of the COO, he will coordinate all activities of the project and supervise its successful prosecution, especially for what concerns the WP where FIM-CISL is leader (WP1, WP3, WP4). In more detail, he will be involved in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T3.1, T3.2, T3.3, T4.1, T4.3, T4.4</p> <p>He will appoint the QAO and collaborate with him for the monitoring and quality assurance activities.</p>
<a href="#">Antonello Gisotti</a> (Senior Officer)	FIM-CISL	<p>Responsible for Continuing Education and Interprofessional Funds. Member of the National Apprenticeship and Training Committee.</p> <p>Mr. Gisotti will liaise with the COO PM and contribute to the implementation of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.5, T3.1, T3.2, T3.3, T4.1, T4.3, T4.4</p> <p>As an experienced trainer, he will support research BEN in defining training activities.</p>
<a href="#">Barbara Arsieni</a> (International Officer and Administrative Personnel)	FIM-CISL	<p>Head of International Office. Researcher in the field of social dialogue, industrial relations and collective bargaining.</p> <p>Ms. Arsieni will liaise with the COO PM and contribute to the implementation of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.5, T3.1, T3.3, T4.1, T4.3, T4.4</p> <p>She will also be in charge of the overall admin/financial management of the project and be the contact person for all project BENs.</p>
<a href="#">Francesco Seghezzi</a> (Scientific Supervisor)	Fondazione ADAPT	<p>Francesco Seghezzi is the President of Fondazione ADAPT and Postdoc Fellow at the University of Modena and Reggio Emilia. His research focuses on occupational dynamics in the labour market, with special reference to the impact of technological innovation on skills and work organisation.</p> <p>Dr. Seghezzi will be in charge of the scientific supervision of Fond. ADAPT and ADAPT research activities. He will liaise with the COO and PM of research-side BENs and the QAO. He will be involved in the delivery of the training and in communication and dissemination activities as for the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p>
<a href="#">Diletta Porcheddu</a> (Project Manager and Researcher)	Fondazione ADAPT	<p>Diletta Porcheddu, graduated in Law and PhD student (expected graduation date – December 2023) at the University of Siena, in "Learning and innovation in work and social contexts". She is a researcher at Fondazione ADAPT. Her field of expertise focuses mainly on digitalisation in the context of industrial relations, and she participates in the preparation and implementation of</p>

		<p>several EU-funded projects: among those, she is currently involved in a Horizon2020 project exploring the topic of mental health in the workplace.</p> <p>Dr. Porcheddu will serve as PM of Fond. ADAPT and ADAPT and will work in strong collaboration with Dr. Seghezzi. She will be in charge of supervising research and training activities of Fond. ADAPT/ADAPT Junior Researchers. She will contribute to the implementation of the following tasks and will cooperate with Ms. Vaccari for the financial management of the project:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p>
<a href="#">Valeria Virgili</a> (Junior Researcher)	Fondazione ADAPT	<p>Valeria Virgili is a research apprentice at ADAPT Foundation since September 2022, while finishing her master's degree in "Politics and Social Policy" at the University of Bologna. She is currently involved in European projects concerning social dialogue and industrial relations with specific reference to inequalities issues.</p> <p>She will contribute to the implementation of the project under the supervision of Dr. Seghezzi and Porcheddu. She will mainly contribute to the delivery of the following tasks:</p> <p>T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p>
<a href="#">Tomaso Tiraboschi</a> (IT Manager)	Fondazione ADAPT	<p>Tomaso Tiraboschi holds a Postdoc degree in ICT and Languages, University of Genoa and The Institute for Educational Technology of the Italian National Research Council. He is the ADAPT Responsible for e-Learning; Research areas: Community management, Digital research, Technologies applied to education and collaborative work.</p> <p>Dr. Tiraboschi will contribute mainly to the activities related to the project webpage and IT-related (T2.5, T4.2)</p>
<a href="#">Serena Vaccari</a> (Financial Manager)	Fondazione ADAPT	<p>She is an experienced ADAPT accountant responsible for book-keeping in line with Italian requirements, processing monthly financial statements and reports, payroll accounting and processing, communication with authorities.</p> <p>She will be in charge of the overall financial management of the project, she will collaborate with Dr. Porcheddu and Ms. Arsieni. She will be namely involved in WP1.</p>
<a href="#">Silvia Spattini</a> (Senior Researcher and Language Expert)	ADAPT Associazione	<p>Silvia Spattini is Senior Research Fellow at ADAPT. She received a PhD in "Learning and innovation in work and social contexts" – University of Siena. She coordinates ADAPT Languages department.</p> <p>She will contribute to proofreading and language revision activities under the following tasks:</p> <p>T2.1, T2.4, T2.5, T4.3</p>
<a href="#">Silvia Caneve</a> (Junior Researcher)	ADAPT Associazione	<p>Silvia Caneve, graduated in Law and PhD student at the University of Siena in "Learning and innovation in work and social contexts", is a junior researcher at ADAPT, specialized in health and safety within the field of industrial relations. Her research primarily focuses on organizational well-being, with a current involvement in the preparation of various project proposals in response to European calls, especially with regard to conceptual and theoretical framing.</p> <p>She will contribute to the implementation of the project under the supervision of Dr. Seghezzi and Porcheddu. She will mainly</p>

		<p>contribute, together with Valeria Virgili, to the delivery of the following tasks:</p> <p>T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p>
Annamaria Tiraboschi (Editorial Staff)	ADAPT Associazione	<p>She is in charge of ADAPT professional editorial activities. She has been involved in several European funded project with responsibilities concerning the delivery of written research outputs.</p> <p>She will contribute to editorial activities under the following tasks:</p> <p>T2.1, T2.4, T2.5</p>
<a href="#">Lourdes Mella Mendez</a> (Project manager and Senior Researcher)	USC (Universidad de Santiago de Compostela)	<p>Full Professor of Labour Law and Social Security in the University of Santiago de Compostela. Her main research fields cover research related to employment contracts, dismissals, social security and European law.</p> <p>Prof. Mella Mendez will serve as PM of USC. She will be in charge of supervising research and organizing training activities of USC Researchers. She will contribute to the implementation of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.3, T4.4</p> <p>Moreover, she will be responsible for the organization of the 1<sup>st</sup> Progress Meeting in Santiago de Compostela.</p>
<a href="#">Silvia Fernandez</a> (Senior Researcher)	USC	<p>Assistant Lecturer of Labour Law and Social Security at the University of Santiago de Compostela. She received a PhD in Human Capital Formation and Labour Market Relations, at the University of Bergamo.</p> <p>She will contribute to the implementation of the project in strong collaboration with Prof. Mella Mendez. She will mainly contribute to the delivery of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.1, T3.2, T3.3, T4.3, T4.4</p>
TBD (Junior Researcher)	USC	<p>A research assistant specialised in OSH topics will be hired if the project is awarded. The assistant will have to possess a PhD in Labour Law and be specialized in labour risk (physical and psychological) prevention and mental health at work.</p> <p>The research assistant will be involved in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.2, T2.3, T2.4, T3.3, T4.2, T4.3, T4.4</p>
Juan Marqués Chávarri (Project Manager and Senior Officer)	UGT-FICA (Federación de Industria, Construcción y Agro de la Unión General de Trabajadores)	<p>He is a senior technician / senior expert of the Occupational Health and Environment Department of UGT FICA since 2004. He has an extensive collective bargaining experience in this field.</p> <p>As PM of UGT-FICA, he will supervise all activities of the project and supervise its successful prosecution, especially for what concerns the WPs where UGT is involved. In more detail, he will be involved in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p> <p>He will liaise with Mr. Berron Montero with reference to financial management of the project.</p>
José Emilio Mesa Ortega (Junior Officer)	UGT-FICA	<p>He is a member of the Occupational Health and Environment Department of UGT-FICA.</p>



		<p>He will contribute to the project with reference to the following tasks:</p> <p>T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p>
Juan Antonio Berrón Montero (Administrative Staff)	UGT-FICA	<p>He is a member of the Administrative Department of UGT-FICA. He will be in charge of the overall financial management of the project, he will collaborate with Mr. Chavarri. He will be namely involved in WP1.</p>
<a href="#">Karolien Lenaerts</a> Project Manager and Senior Researcher)	KU Leuven (Katholieke Universiteit Leuven)	<p>She is head of the Research Group Work, Organisation and Social Dialogue at KU Leuven. Karolien obtained a PhD in Economics at Ghent University in 2014, with a thesis on "The supply and demand side of foreign direct investment spillovers". At HIVA, Karolien is mainly involved in the coordination and the ongoing research on topics such as the effects of digitalisation and globalisation in the labour market, the working conditions and social protection of platform workers, job quality, occupational safety and health, workers' representation and participation, and related topics. In addition, Karolien conducts research on behalf of Eurofound, EU-OSHA and the ILO.</p> <p>Dr. Lenaerts will serve as PM of KU Leuven. She will be in charge of supervising and implementing research and training activities of KU Leuven team. She will liaise with Ms. Vertongen in the financial management of the project. She will contribute to the implementation of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T3.3, T4.2, T4.3, T4.4</p>
<a href="#">Lise Szeker</a> (Senior Researcher)	KU Leuven	<p>She holds a Master in Labour Psychology and works as PhD student at HIVA-KU Leuven in the research group Work, Organisation and Social Dialogue since 2012. Her research focuses on job quality, job types and working conditions in Belgium and Europe, and among specific groups such as job quality of temporary agency workers, green jobs, ICT-jobs.</p> <p>She will contribute to the implementation of the project in strong collaboration with Dr. Lenaerts. She will mainly contribute to the delivery of the following tasks:</p> <p>T1.2, T1.3, T2.2, T2.3, T2.4, T2.5, T2.6, T3.2, T3.3, T4.3, T4.4</p>
<a href="#">Huib Huyse</a> (senior researcher)	KU Leuven	<p>He has a doctorate in education (University of Sussex, 2011) and over 25 years of experience in development cooperation and global development. He heads the research group on Sustainable Development at KU Leuven.</p> <p>He will contribute to the implementation of the project in strong collaboration with Dr. Lenaerts. He will mainly contribute to the delivery of the following tasks:</p> <p>T1.3, T2.3, T2.6, T4.3</p>
<a href="#">Noah Vangeel</a> (Junior Researcher)	KU Leuven	<p>He earned his bachelor's degree in commercial engineering from UHasselt in 2019. His interest in research led him to Leuven, where he obtained his master's in commercial engineering with a minor in research in economics in 2021. There, he started an educational master's in September 2021, and began working as a research associate at HIVA on Jan. 24, 2022. Within HIVA, he works at the Movement.net/ACV Chair in Sustainable, Just and Caring Society.</p> <p>He will contribute to the implementation of the project under the supervision of KU Leuven senior researchers. He will mainly contribute to the delivery of the following tasks:</p>



		T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.5, T3.1, T3.2, T3.3, T4.2, T4.3, T4.4
<a href="#">Kadriye Bakirci</a> (Project Manager and Senior Researcher)	HACETTEPE UNIVERSITESI	<p>Kadriye Bakirci is a professor of employment/labour and social security law at Hacettepe University Law Faculty in Ankara in Turkiye. She serves as a member of the Advisory Committee of the Human Rights and Equality Institution of Turkey since 2021. Currently she is a visiting academic at the University of Oxford Faculty of Law and a visiting fellow at Kellogg College. Her areas of expertise include comparative employment and social security law, business and human rights, new technologies/digitalisation and the law, gender equality and non-discrimination law, human rights of working children, occupational health and safety. She has various national and international books, reports, articles published. Her publications have led to changes in Turkish legislation. She has received a number of grants/funds for her research. She has participated in more than twenty projects funded by the UN, UNICEF, ILO, COE and EU.</p> <p>Prof. Bakirci will serve as PM of HACETTEPE. She will be in charge of supervising and implementing research and training activities of HACETTEPE Research Assistant. She will contribute to the implementation of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.1, T4.2, T4.3, T4.4</p>
TBD (Research Assistant)	HACETTEPE UNIVERSITESI	<p>A research assistant specialised in OSH topics will be hired if the project is awarded. The assistant will have to possess skills in social and legal research. He/she will be involved in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.2, T2.3, T2.4, T2.6, T3.3, T4.3, T4.4</p>
Hasan Tahsin Benli (Project Manager)	TMS (TURK METAL SENDIKASI)	<p>Hasan Tahsin Benli is the coordinator in charge of the Press Unit of the Turkish Metalworkers' Union and also continues to serve as an internal consultant for President of Turk Metal.</p> <p>As PM of TMS, he will coordinate all activities of the project and supervise its successful prosecution, especially for what concerns the WP where TMS is involved. In more detail, he will be involved in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.3, T3.1, T3.2, T3.3, T4.3, T4.4</p> <p>He will liaise with COO for the organization of the transnational training session in Ankara.</p>
Burak Ekmekcioglu (Junior Officer and Language Expert)	TMS	<p>He is director of international relations unit in Turkish Metalworkers' Union.</p> <p>He will support TMS PM in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.5, T3.1, T3.2, T3.3, T4.2, T4.3, T4.4</p> <p>Burak will also serve as a Language Expert for the TMS team.</p>
Erencaan Marti (Administrative Personnel and Editorial Staff)	TMS	<p>He has been working at the Turkish Metal Union for four years. In the first year, he spent as a researcher at the research and training centre.</p> <p>He will support TMS PM (with regard to administrative activities) in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.5, T3.1, T3.2, T3.3, T4.2, T4.3, T4.4</p> <p>Erencaan will also serve as Editorial staff for the TMS team.</p>

<p><a href="#">Margaret Heffernan</a> (Project Manager and Senior Researcher)</p>	<p>DCU (Dublin City University)</p>	<p>Margaret Heffernan is Associate Professor in HRM at Dublin City University Business School. Margaret is a chartered member of the Chartered Institute of Personnel &amp; Development and a FAS accredited trainer. She is also certified by the British Psychological Society (BPS) to administer a range of psychometric instruments. Her main research interests focus on strategic human resource management, organisational justice and employee outcomes, compassion at work, return to work after illness and psychological contracts. Margaret is on the editorial board of the International Journal of Human Resource Management and the Irish Journal of Management and is also a member of Editorial Review Board for Employee Relations. She is currently Vice Chair of the Irish Academy of Management.</p> <p>As PM of DCU, she will coordinate all activities of the project and supervise its successful prosecution, especially for what concerns the WP where DCU is involved. In more detail, she will be involved in the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.2, T4.3, T4.4</p> <p>She will liaise with COO and Fond. ADAPT for the delivery of the video of the Increme(n)tal Interactive Guide.</p>
<p><a href="#">Aurora Trif</a> (Senior Researcher)</p>	<p>DCU</p>	<p>Aurora Trif is an Associate Professor in International Employment Relations and HRM at Dublin City University Business School. After completing her PhD in Industrial Relations at the London South Bank University, Aurora was awarded a post-doctoral fellowship by the Max Plank Institute for Studies of Societies in Cologne and a Newman Post-doctoral Scholarship in New Employment Relations by University College Dublin. Aurora is a member of the Irish Industrial Relations Association and the CRANET international HRM network.</p> <p>She will support Dr. Heffernan in the completion of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.3, T4.4</p>
<p><a href="#">Eugene Hickland</a> (Senior Researcher)</p>	<p>DCU</p>	<p>Eugene Hickland is an Assistant Professor of Employee Relations and Human Resource Management at Dublin City University Business School. He has previously worked at managerial and people management levels in Irish and Multinational companies in Ireland for many years. Eugene's research interests include; workplace innovations, industrial democracy, employee voice, trade union organisations and employment regulation.</p> <p>He will support Dr. Heffernan in the completion of the following tasks:</p> <p>T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.3, T4.4</p>
<p>TBD (Postdoctoral Researcher)</p>	<p>DCU</p>	<p>A research assistant specialised in OSH topics will be hired if the project is awarded. The assistant will have to possess skills in social and legal research.</p> <p>He/she will contribute to the project implementation with reference to the following tasks:</p> <p>T1.2, T1.3, T2.1, T2.2, T2.3, T2.4, T2.6, T3.1, T3.2, T3.3, T4.2, T4.3, T4.4</p>
<p>Brian McGann (Project Manager and Senior Officer)</p>	<p>SIPTU (Services Industrial Professional</p>	<p>Brian is the head of Organisational Development in SIPTU. Brian has also been a Director of the IDEAS Institute for over five years and currently serves as Executive Director.</p>

	Technical Union)	As PM of SIPTU, he will coordinate all activities of the project and supervise its successful prosecution, especially for what concerns the WP where SIPTU is involved. In more detail, he will be involved in the following tasks:  T1.1, T1.2, T1.3, T2.1, T2.2, T2.3, T2.5, T3.1, T3.2, T3.3, T4.2, T4.3, T4.4
Tony Murphy (Researcher/Trainee)	SIPTU	He currently is the Workplace Innovation Engineer at The IDEAS Institute. He works in many companies with both management and union members, implementing Workplace Innovation, developing and delivering change programmes, as well as providing accredited team-working and partnership training.  He will contribute mainly to the organization of the training activities in IE foreseen in WP3. He will support SIPTU activities in WP4. He will provide feedback where needed, on research tasks in WP2.
Kevin P O'Kelly (Researcher)	SIPTU	Kevin was an Associate Researcher with the European Trade Union Institute (ETUI), Brussels, 2002-2014 and now works as a Project Researcher at SIPTU.  He will contribute mainly to the organization of the training activities in IE foreseen in WP3. He will support SIPTU activities in WP4. He will provide feedback where needed, on research tasks in WP2.
Frank Vaughan (Researcher/Trainee)	SIPTU	Frank is a graduate of University College Dublin, where he was awarded a Bachelor of Commerce degree, and currently works as a consultant in Occupational Safety & Health, and in Education & Training departments at SIPTU.  He will contribute mainly to the organization of the training activities in IE foreseen in WP3. He will support SIPTU activities in WP4. He will provide feedback where needed, on research tasks in WP2.
Mary Ogundipe (Administrative Staff)	SIPTU	Mary is an experienced Office/Project Administrator, Project Researcher, Bookkeeper and highly qualified HRM practitioner who manages the day-to-day financial transactions and record keeping for IDEAS.  She will support SIPTU team with regard to administrative activities, namely under WP1.
<a href="#">Marta Kahancova</a> (Senior Researcher and Supervisor)	CELSI (STREDOE UROPSKY INSTITUT PRE VYSKUM PRACE)	Marta Kahancová, PhD, is the managing director of CELSI. Her research interests are in Sociology of Organizations and Work; in particular, she studies work practices and social interaction in multinational firms, industrial relations and work-related migration. She has actively participated in many international conferences, seminars and research projects. She has published in international peer-reviewed journals in Industrial Relations, Sociology and Human Resource Management.  Dr. Kahancova will be in charge of the scientific supervision of CELSI research activities. She will liaise with the COO and PM of research-side BENs and the QAO. She will be involved in the delivery of the training and in communication and dissemination activities as for the following tasks:  T1.1, T1.2, T1.3, T2.4, T2.6, T3.1, T3.2, T3.3, T4.3, T4.4  She will lead the activities towards the realization of the Comparative Research Brief (D2.3) and liaise with AP OZ KOVO with reference to activities concerning their involvement in the project.

<p><a href="#">Barbora Holubova</a> (Project Manager and Senior Researcher)</p>	<p>CELSI</p>	<p>Barbora Holubová is a researcher at Central European Labour Studies Institute (CELSI) in Bratislava, currently involved in several international research projects on integrated social sciences research infrastructures, social dialogue and collective bargaining in CEE region. She has experience in applied social research in the area of the labour market, social policies, gender inequalities using both the quantitative and qualitative data analysis methods. She also has practical skills in comparative policy analysis, research tools design, and programme evaluation. She graduated from the Comenius University, Bratislava in Sociology where she also defended her PhD. with specialisation in sociological methodology, applied quantitative analysis and sociology in politics.</p> <p>Dr. Holubova will serve as PM of CELSI and will work in strong collaboration with Dr. Kahancova. She will be in charge of supervising research and training activities of CELSI Researchers. She will contribute to the implementation of the following tasks and will cooperate with Ms. Mikulíková for the financial management of the project:</p> <p>T1.3, T2.4, T2.6, T3.1, T3.2, T3.3, T4.3, T4.4</p> <p>Together with Dr. Kahancova, she will liaise with AP OZ KOVO with reference to activities concerning their involvement in the project.</p>
<p><a href="#">Lucia Kovacova</a> (Researcher)</p>	<p>CELSI</p>	<p>Lucia is a researcher at Central European Labour Studies Institute (CELSI), currently involved in several projects on social dialogue and employment policies. She has been involved in different research projects on social entrepreneurship, youth employment and labour integration of vulnerable groups such as ethnic minorities or people with disabilities. Lucia graduated at the Central European University in Public Policy with specialisation in equality and social justice.</p> <p>She will work in collaboration with CELSI team with regard to the following tasks:</p> <p>T1.2, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T3.1, T3.2, T3.3, T4.3</p>
<p><a href="#">Adam Šumichrast</a> (Researcher)</p>	<p>CELSI</p>	<p>Adam Šumichrast is a doctoral candidate in comparative labor and social history at the Institute of History (Masaryk University in Brno, Faculty of Arts) and a researcher at the Central European Labour Studies Institute. He is interested in industrial relations, trade union research, industrial unrest and collective actions.</p> <p>He will work in collaboration with CELSI team with regard to the following tasks:</p> <p>T1.2, T2.1, T2.2, T2.3, T2.4, T2.5, T2.6, T4.3, T4.4</p>
<p><a href="#">Simona Brunnerova</a> (Research Assistant)</p>	<p>CELSI</p>	<p>Simona Brunnerová assists the CELSI team by supporting research projects, while currently studying at the Faculty of Social and Economic Sciences at Comenius University in Bratislava She also helps with the day-to-day running of the institute.</p> <p>She will support CELSI team with regard to the following tasks:</p> <p>T2.2, T2.3, T4.2, T4.3, T4.4</p>
<p><a href="#">Soňa Mikulíková</a> (Administrative Staff)</p>	<p>CELSI</p>	<p>Soňa Mikulíková is a project administration officer at CELSI. She is the main contact person in project administration, responsible for document control, financial reporting, contracting and invoicing.</p> <p>She will support CELSI team from an administrative point of view, with specific reference to the following tasks:</p>

		T1.1, T1.3, T4.4
<a href="#">Elana Buzášová</a> (Account)	CELSI	She is an accountant and responsible for CELSI Financial Accounting.  She will serve as accountant for CELSI and will be involved in T1.1.

**Outside resources (subcontracting, seconded staff etc)**

*If you do not have all skills/resources in-house, describe how you intend to get them (contributions of members, partner organisations, subcontracting, etc).*

*If there is subcontracting, please also complete the table in section 4.*

Considering the international scope of the project and in order to guarantee the highest quality standards with reference to the different stages and outputs of the research and training activities, the partnership considered it appropriate to identify and involve, already at the time of writing this proposal, a Quality Assessment Officer (QAO): **Iván Williams Jiménez, Independent Researcher (Technical expert and independent researcher with UN -ILO- and EU bodies. CV available in Annex 2)**. The cost of the external consultancy service will be borne by the COO, who will also cover the travel costs for events involving the participation of Dr. Jimenez.

Dr. Jimenez, as agreed with the COO, will contribute to the implementation and finalisation of the following Tasks, validating, in close cooperation with the relevant BENs, the research deliverables and contributing as an international expert to the delivery of the training (transnational training session).

- T1.2: Kick-off meeting and project progress meetings
- T1.3: Monitoring, quality assurance and risk assessment
- T2.4: IncreMe(n)tal National Highlights - drafting and delivery
- T2.5: IncreMe(n)tal EU Interactive Guide - drafting & delivery
- T3.1: Training activities organization and course design
- T3.2: Delivery of training sessions at national level
- T3.3: Organisation and provision of the national transnational training session
- T4.4: Organisation & Delivery of IncreMe(n)tal Final Conference

**2.4 Consortium management and decision-making****Consortium management and decision-making (if applicable)**

*Explain the management structures and decision-making mechanisms within the consortium. Describe how decisions will be taken and how regular and effective communication will be ensured. Describe methods to ensure planning and control.*

*Note: The concept (including organisational structure and decision-making mechanisms) must be adapted to the complexity and scale of the project.*

**Consortium management is ensured by the provision of clear and well-defined roles and responsibilities, complemented with the necessary tools and resources to perform related tasks.**

Already in the submission phase, BENs have been given clear roles and tasks ownership so as that they know what it is expected from them and what they are responsible for. This applies also to APs which have adhered to our consortium, by formally committing themselves to ensure the proper development of the project, as regards their respective fields of competence and actions. BENs have also been attributed specific resources to perform their respective activities (see paragraph 4). An agreement on single roles, tasks and resources has been therefore already reached by all consortium members with their acceptance of being part of this project and actively contributing to its design and submission. However, the internal consortium agreement which will be signed by all BENs at the beginning of the project will serve as an additional basis for high-quality and timely project implementation and consortium coordination.

**Coordination of the entire project is built into the WP structure and the collective membership of WP teams.** In each WP, all BENs are involved, though with different degrees of required commitment and effort, to ensure a distribution as equal as possible of the workload. FIM-CISL as coordinator of the whole initiative, leads 3 WPs. Although some BENs are not WP leaders (this is also not possible in view of the participation of as many as 13 BENs against 4 WPs), they play substantial roles respectively in the organisation and delivery of training (phase in which the TU BENs are particularly involved and committed both from the point of view of organising activities and the benefit of the training), in communication and dissemination activities (where, however, the expertise of CELSI and DCU are enhanced through the provision of their coordination of specific activities and the finalisation of two important deliverables, i.e.,









activities through, at least, bi-weekly exchanges between the project coordinator and the task leaders and through the bi-monthly meetings of the partners.

- **Quality** – assurance of the high quality of project deliverables and activities implementation. This criterion ensures that daily activities directly contribute to the achievement of the overall goals and that each separate deliverable is submitted following the highest quality requirements, referring to its authentic content, formatting, design and other relevant aspects. Quality is ensured through the continuous implementation of control and monitoring, as well as through the internal reviews of the project deliverables.

- **Correct distribution of efforts** – this criterion refers to the optimal number of person/months to be used for each task and the coherence between different staff members involved. Interim financial reporting (at M12) will allow to track the status of efforts used and address the divergencies (if needed).

- **Effective use of financial resources** demonstrates whether all the financial resources are used optimally by the BEN. The interim financial report will allow to track project spending and take any corrective measures, if needed.

- In addition to the activities of the QAO, monitoring and quality assurance will take place on the Work Package level, too: **the WP and Task leaders will be responsible for monitoring and coordinating all the WP activities and partners' contributions**, applying the above-listed criteria towards the tasks and deliverables of the WP.

Examples of Project Metrics and their monitoring (to be finalised by FIM-CISL during the KoM):

WP	Results	Metrics
WP1: Project coordination, risk management and quality assurance	Successful and well-managed project; Risks identified and timely contained; Quality of work and deliverables ensured; Data Management and Ethics Plan prepared and Implemented.	2 in-person Progress meetings 11 bi-monthly meetings 1 Quality Assurance Officer appointed 1 Administrative Package delivered
WP2: Research activities and preparation for training	Collection of background information and Conduction of preliminary research supporting training activities	1 online questionnaire outline (workers' active in the metalworking sector) 1 interviews' outline (workers' representatives active in the field of OSH, companies, sectoral-level trade unionists) 1 interviews' outline (members of European-level/international representative organisations) 210 feedback from the questionnaire (30 workers per selected country). 35 interviews completed (interview with at least 2 workers' representatives active in the field of OSH, 1 sectoral trade unionist and 2 companies per selected country). 3 interviews completed (Members of European-level/international representative organisations) 1 "training template" 7 National Highlights (max. 25 pages each) for IT, IE, ES, BE, TR, SI, SV. 1 European-level interactive Guide 1 Comparative Policy Brief
WP3: Training activities	Quality training provided and assessed	Delivery of 7 National trainings (composed of 3 sessions lasting 5 hours each) delivered in 7 countries (IT, IE, SI, SK, TR, ES, BE). 105 participants to the National training sessions (min. 15 – max. 20 participants per country).

		100 participants to the Transnational training session (in-person and online)
WP4: Communication, dissemination and follow-up activities	Visibility and uptake of the project results Long-term sustainability and impact of the developed EU Interactive Guide	1 Final Conference organised Min 50 people attending the final event besides the attendees from BEN. Min 7 informative contributions disseminated (one for each research BEN) Min 10 Press Releases published (1 for the KoM, 1 for the Final Conference) Project page created Min 350 downloads of the National Highlights Min 500 downloads of the EU Interactive Guide 1 project webpage Participation to min. 1 session of the Metal Industry European Sectoral social dialogue committee Min. 8000 potential readers of the National Highlights summaries (subscribers of the ADAPT International Bulletin, KU Leuven and CIELO Laboral Newsletter)

**During the context of the Final Conference (M24) all project partners will be involved in a Final Quality Assessment meeting, also participated by the Quality Assessment Officer: the outcome of the meeting will be a Final Quality Assessment Report of internal use (D1.2).**


Thanks to this project design and set up, during the project implementation, the Project Manager of the COO will find it easier to: ensure that only what was agreed to is delivered; tracking the project schedule and monitoring possible delays; manage the project budget and costs; ensure that the activities performed and outputs delivered are of acceptable quality; take advantage of and further develop the competences and skills of the project consortium; ensure regular dissemination of project information; build and cultivate regular relationships with stakeholders to inform project activities; identify, manage and mitigate project risks; manage the project contract with the European Commission.

## 2.6 Cost effectiveness and financial management

### Cost effectiveness and financial management *(n/a for prefixed Lump Sum Grants)*

*Describe the measures adopted to ensure that the proposed results and objectives will be achieved in the most cost-effective way.*

*Indicate the arrangements adopted for the financial management of the project and, in particular, how the financial resources will be allocated and managed within the consortium.*

 **Do NOT compare and justify the costs of each work package, but summarize briefly why your budget is cost effective.**

The project was designed and structured according to a methodology that allows to **obtain results with the maximum effectiveness and with the use of minimal economic resources**. The activities were divided among the various BEN and AE according to the most coherent tasks avoiding duplication or unnecessary waste of resources. **Moreover, all BEN and AE have been involved in drafting the overall activities from the very beginning of the submission phase and they've been asked to autonomously allocate among their staff the PMs identified by the COO for each task.**

The COO and BENs used their experience in managing transnational training projects to **draft a reliable simulation of working days and subsequently to identify PM for each WP and tasks.**

**The financial part of the project has been structured thanks to precise and reliable information provided by BENs, so as to:** a) minimize the nonessential costs; b) avoid duplications of those effectively necessary to achieve the aim; c) **prioritize online meetings/gatherings** (field work interviews included) where possible but also scheduling in presence events to strengthen the cooperation among BEN in accordance to the overall consortium management approach. Moreover, **thanks to the experience gained by the coordinator and the other project partners, moments of interactions have been envisaged involving the use of a hybrid methodology to maximize results and avoid the movement of too many subjects.** d) **identify suitable locations to host in-person events available as a priority free of charge** at the premises of the BENs and other organisations in their networks/interested in the topics covered by the project (see "in kind contributions" within WPs descriptions); e) **calculate the travel**

**expenditures using as a reference the EU parameters included in the Multi-beneficiary Model Grant Agreement and using the Flight and Rail calculator and also calculating DSAs in the light of light lunches/catering services planned during events, thus reducing them proportionally and consistently.** e) all costs have been evaluated with a comparative method to combine costs, quality and sustainability according to the principles of **Best Value for Money**. Finally, **interpretation costs have been included only when necessary and considering national fares as for BEN indications**, to 1) to avoid linguistic barriers during key projects events (i.e., Transnational training session) and to 2) engage a higher number of interested participants in public events like the KoM and the Final Conference. Likewise, translation costs are foreseen for written outputs (namely, the National Highlights and the European-level Interactive Guide – the latter through an automatic software) to support the project sustainability also after its completion and its transnational impact. In addition, **with regard to these costs and the others envisaged in the "Other goods, works and services" budget category, precise quotations were requested from the BENs and service providers** (e.g., advertising on the website and newsletter of Social Europe/room rentals/video making activities). **With reference to the staff selection and allocation under different tasks and work packages, BENs and AEs have been asked to distribute their staff autonomously, on the basis of the task/PM simulation drafted by the COO.** Thus, **only strictly necessary professional profiles for implementing the project and deliver quality outputs have been included by each BEN and subsequently validated by the COO.** Moreover, each BEN has already identified an experienced person dedicated to the financial management of the project during the whole duration of the action and can count on structured administration and accounting departments in their organisations. Accounting staff will be in touch with its BEN project manager which, in turn, will liaise with the project COO. In crucial moments for the financial management of the project, PMs have been duly allocated on WP1 for allowing a smooth implementation of financial and accounting related activities.

Finally, despite the fact that the overall budget (max. EU requested contribution) is higher than the maximum threshold indicated in the call (€ 500,000.00), it is consistent with (1) the involvement of 13 Beneficiaries, 1 AE and 2 APs, (2) the scope of the action in terms of research and mainly training activities, and (3) the transnational dimension of the project in terms of both research and training activities and communication and dissemination ones.

## 2.7 Risk management

### Critical risks and risk management strategy

*Describe critical risks, uncertainties or difficulties related to the implementation of your project, and your measures/strategy for addressing them.*

*Indicate for each risk (in the description) the impact and the likelihood that the risk will materialise (high, medium, low), even after taking into account the mitigating measures.*

***Note:** Uncertainties and unexpected events occur in all organisations, even if very well-run. The risk analysis will help you to predict issues that could delay or hinder project activities. A good risk management strategy is essential for good project management.*

Risk No	Description	Work package No	Proposed risk-mitigation measures
1	<b>Limited timeframe to fulfil the tasks</b> (Medium probability/High impact)	All	Creation of a detailed timeline of all project activities (also shared via online calendar accessible by all BENs; monitoring of task implementation in bimonthly meetings and calls + Progress Meetings; flexible arrangements between BENs to support respective work and ensure the continuation of the project and the achievement of its objectives; partial overlap in specific expertise among BENs, so that if any consortium member is unable to perform its task in a WP or part of it, this task could likely be taken over by one of the other BENs
2	<b>Overcoming allocated working time to fulfil the tasks</b> (Low probability/High impact)	WP2, WP3, WP4	Agreement between all BENs of allocated working time, during the submission phase; possibility to transfer working time for one task to another if needed (budget flexibility); involvement of experienced researchers and project managers in each BENs, with expertise with multiple and overlapping deadlines; provision of Gantt Chart and internal interim deadlines at the beginning of the project and regularly updated at the start of each task.

3	<b>Rising inflation</b> (Medium probability/Low impact)	WP2, WP3, WP4	Lump sums were used in the budget following EC guidelines; quotation of the goods and services to be purchased on the basis of their real costs in the different countries rounded up in the budget definition; Financial stability of selected BENs; plan to replace physical events with online activities; experience of all BENs in the conduction of fruitful online activities; plan to quickly relocate project budget to achieve the best impact through online activities.
4	<b>Partners related risks</b> – underperforming, leaving the project, key-personnel temporarily not available, etc. (probability low – impact high)	All	Larger teams involved in the project on behalf of all BENs. Bi-monthly online meetings to identify similar issues. Flexible project management structure. Moreover, All consortium members have the facilities and expertise to individually execute the tasks as described in paragraph 4. For most of the tasks, there is a complementarity as well as a partial overlap in specific expertise, such that should any consortium member be unable to perform its task in a WP or part of it, this task could likely be taken over by one of the other consortium members.
5	<b>Linguistic barriers</b> (critical risk) (probability high– impact high)	All	Interpretation services, written texts translations foreseen where possible, within the limits imposed by reasons of economic efficiency and sustainability of the project.  National training sessions delivered directly in national languages.
6	<b>Collaboration and communication issues</b> (probability low – impact high)	All	Bi-monthly online meetings  Involvement of the experienced project coordinator to the management of such issues  Previous fruitful collaborations between BENs and between BENs and COO
7	<b>Low stakeholder participation</b> (for interviews and questionnaires) (probability low – impact high)	WP2 WP3	Engagement of the stakeholders from M3  Reachable targets  Reliance on the BENs and APs networks
8	<b>Low participation of trainees to national and transnational training sessions</b> (probability medium– impact high)	WP3	Agreement reached between research partners, COOs and TU BENs and AP (OZ KOVO) when writing this proposal on the minimum and maximum number of trainees per training session.  Active diffusion of date and time of the national training sessions by trade union BENs among their members. Transnational training session organised in hybrid mode in order to facilitate participation. Incentives for participation offered to participants in terms of competences increase through training and opportunity to take part in further high-level exchange opportunities (transnational final Conference).
9	<b>Low quality of research outputs and training materials</b> (probability medium– impact medium)	WP2	Periodic evaluation of project outputs (National Highlights; training materials; European-level Interactive Guide) during in-person Progress meetings;  Appointment of a QAO (Quality Assessment Officer).

### 3. IMPACT

### 3.1 Impact and ambition

#### Impact and ambition — Progress beyond the state-of-the-art

*Define the short, medium and long-term effects of the project.*

*Who are the target groups? How will the target groups benefit concretely from the project and what would change for them?*

*Does the project aim to trigger change/innovation? If so, describe them and the degree of ambition (progress beyond the status quo/state-of-the-art).*

Considering the scenario described in § 1.2 and § 1.3, the knowledge and skills needed by trade unionists and workers' representatives concerning workers' mental health must be enlarged. **Providing workers' organisations with the proper skills to effectively address the challenges posed by emerging psychosocial risks which might impact workers, thus contributing to fill a gap in the praxis of industrial relations, is the main rationale of Increme(n)tal: Increasing Metalworkers' representatives' Awareness and Skills on Mental Health Protection & Promotion in the Workplace.** IncreMe(n)tal is aimed at **increasing the current level of knowledge and skills among workers organizations on the topic of workers' mental health and to improve workplace-level industrial relations by: providing trade unionists and workers' representatives with information and training based on solid research on mental health risks in the workplace** (also connected to digitalization and workplace inequalities), OSH national and European legal frameworks and practices of action and negotiations on the topic; **fostering exchanges between different workers' organizations across Europe; promoting social dialogue and collective bargaining initiatives on the discussed issues and fostering the collaboration between trade unions and scholars at the national and transnational level.**

In the short term, the project aims at **deepening and enriching the knowledge related to mental health risks in the workplace and, specifically, the role and prerogatives which could be exerted by trade unions and workers' representatives in their prevention and management.**

In the medium term and in the seven countries where national training sessions take place, IncreMe(n)tal aims at **improving collective bargaining and social dialogue initiatives in this field and enhancing the adoption of collective solutions for the protection of workers' mental health** in a context where work organisation is undergoing significant transformations.

For what concerns information and training, the goal is to **reach at least 105 trade union members per country during national training sessions** (min. 15 workers per 7 countries – for each training session), and 100 trade union members during the transnational training session of M20. Moreover, **min. 21 companies (3 per country) will be involved in the project thanks to their engagement through the interventions foreseen in the research phase** (see T2.2). Additionally, both companies and workers' representatives of the 7 target countries will be able to benefit from the fictional case scenarios included in the National Highlights (D2.1) – useful tackle practical issues related to workers' mental health.

**While other actions financed under this budget line have been intended to foster the role of industrial relations in managing the introduction of flexible work organization models also exploring the side of emerging OSH issues, this would be the first action to be specifically focused on workers' mental health protection.**

In the long term, **the project's impact depends on the uptake of the developed Interactive Guide which thanks to its automatic translation from English into EU27 languages and Turkish could represent a useful tool for trade unionists' and workers' representatives, as well as the seven National Highlights (D2.1) – which will be available on the project webpage also after the end of the project, together with the training materials used in the national and transnational sessions.**

#### Impact on non-EU countries

*Please specify which country(ies) benefit from the project. Why is the project important for those country(ies)? How does it improve the situation the country(ies)?*

Turkey will directly benefit from the project thanks to the **involvement of both a trade union (TMS) and a research BEN (HACETTEPE) in the Consortium.**

Notably, **the transnational training session (D3.2) will be organized in Turkey to potentially exploit the multiplier effect of the event and to make the best usage of TMS conference premises available, taking into account a likely concurrent meeting of the Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area.** By including Turkey, it is possible to **assess the situation of a country external to the application of European Union OSH legislation** and also characterized by a low degree of union density and decentralized collective bargaining as the dominant level of negotiation.

In addition, **the impact of Increme(n)tal will extend beyond the borders of the EU also through the participation of non-EU trade unionists and workers' representatives to the transnational training session, which will be ensured by appropriate dissemination of the event through the COO's international network.**

Moreover, non-EU countries could get to know IncreMe(n)tal activities and results thanks to communication and dissemination activities performed by all BENs and APs within their respective channels and networks, and notably via the publication of informative articles on the **ADAPT International Bulletin and Noticias CIELO (which currently has more than 1000 subscribers registered in countries outside the European Union)**, and The Global Deal - ILO & OECD website: all consulted by stakeholders and social partners based in non-EU countries in all the six continents. The same applies to the advertisement of Deliverable D2.2 on Social Europe's website.

Target groups and activities			
<p><i>For ESF+ actions, specify the type of target groups involved in the project activities (if applicable).</i></p> <p>Type target groups:</p> <ol style="list-style-type: none"> <li>1. Migrants/refugees</li> <li>2. Other 3rd country citizens (not migrants)</li> <li>3. Children</li> <li>4. Elderly people (3rd age)</li> <li>5. Homeless</li> <li>6. Most deprived</li> <li>7. Marginalised communities</li> <li>8. People in vulnerable situations</li> <li>9. Persons with disability</li> <li>10. Not in Education, Employment or Training (NEETs) / Inactive</li> <li>11. Long Term Unemployed (LTU)</li> <li>12. Self-employed and short-term contract workers (up to 6 months)</li> <li>13. Social entrepreneurs, actors of the social economy</li> <li>14. Micro-entrepreneurs</li> <li>15. Social partners</li> <li>16. Women</li> <li>17. Workers</li> <li>18. Other, please specify</li> </ol>			
Target Group Type No	Description of the activity involving the target group(s)	Work Package No	Beneficiary leading this activity
No. as per above			
No. as per above			
<p><i>For ESF+ actions, specify the number of activities planned (if applicable).</i></p> <p>Type of activities:</p> <ol style="list-style-type: none"> <li>1. Analytical activities</li> <li>2. Information sharing and mutual learning</li> <li>3. Number of capacity building activities and networking organised</li> </ol>			
Activity Type No	Description of the activity	Work Package No	Beneficiary leading this activity
No. as per above			
No. as per above			

### 3.2 Communication, dissemination and visibility

Communication, dissemination and visibility of funding
<p><i>Describe the communication and dissemination activities which are planned in order to promote the activities/results and maximise the impact (to whom, which format, how many, etc.). Clarify how you will reach the target groups, relevant stakeholders, policymakers and the general public and explain the choice of the dissemination channels.</i></p> <p><i>Describe how the visibility of EU funding will be ensured.</i></p>



The main goal of the project's dissemination activities is **implementing communication activities and events in order to promote IncreMe(n)tal results and maximize the project's impact**. The focus of the dissemination actions, through the sharing of research outputs and training materials, is that of **raising awareness on the role of trade unions and workers' representatives in addressing the topic of workers' mental health, by preventing and managing psychosocial risks arising from their work environment and work organization**.

**FIM-CISL, as COO and WP leader, will take on a coordinating role with regard to communication and dissemination activities**, which will be however shared among COO, BENs and APs (see below). Namely, FIM-CISL will **provide BENs and APs with a logo of the project and a full set of templates** devoted at 1) consolidating the project branding and visual branding, 2) improving BEN and AP commitment in disseminating project results and achievements with common visual standards.

FIM-CISL, with the support of Fond. ADAPT, will also draft an **Impact amplification Plan (D4.1)** detailing all communication and dissemination activities planned for the project and their potential impact.

**Fond. ADAPT will host the official webpage of the project**, which will be regularly updated by its staff, in agreement with FIM-CISL as COO. All BENs will provide compulsory materials (deliverables) in due time, using project templates and editorial norms for their upload. The webpage will be designed in compliance with the project visual identity standards and will display the main project outputs.

**A Twitter account of the project will be created by Fond. ADAPT and regularly updated by all project partners**: credentials of the Twitter account will be shared with all research BENs, who will manage it in 3-month-turns (starting with a 6-month-turn for Fond. ADAPT). **A specific hashtag dedicated to the project (#IncreMENTAL\_EU) will be used to disseminate relevant project materials and outputs** through the partners' main communication channels. This task has been allocated to Fondazione ADAPT and its AE, given its expertise (12 thematic Twitter accounts managed and 5 of them overcoming together 30,000 followers).

In addition to the regular updates on the project's webpage, **all BENs and APs are committed to disseminate relevant project materials and outputs through their main communication channels**. Specific instructions concerning dissemination activities will be provided by FIM-CISL as WP leader to interested BENs and APs (considering their different level of involvement in the project), every time a new project material or output will be produced – coherently with the contents of the Impact and amplification plan (D4.1). Notably, **partners will be asked to circulate: the research outputs (National Highlights, EU Interactive Guide; Comparative Policy Brief); the transnational training session agenda; the Final Conference agenda**.

To involve all BENs and APs in these activities and make them responsible for the success of dissemination, **an excel spreadsheet will be provided by FIM-CISL to all BENs and APs, which will be asked to report the evidence of main communication and dissemination activities carried out (i.e., tweets, posts online, interviews, media articles, newsletters, events, etc.)**. This activity will facilitate the updating of the sections dedicated to dissemination and communication activities on the continuous reporting platform of the EC.

The dissemination of project outputs and events will benefit from the **multiplier effect of Fond. ADAPT being media partner of the next EU-OSHA campaign (Safe and Healthy Work in the Digital Age, running from 2023 to 2025)**.

Lastly, **project events will (when possible) be organised in conjunction with the meeting of the 2025/2026 Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area** (notably, the transnational training session of M20) - also to make the best usage of TMS premises available – but also **in parallel with relevant initiatives concerning mental health organized by European and International organisations, for example World mental health day (WHO), European Mental Health week (MHE), the Endstress.eu campaign promoted by Eurocadres and ETUC in order to maximise their dissemination**.

Besides these communication and dissemination initiatives, **contributions summarizing the results of the research activities (namely, National Highlights - D2.1) will be written by BENs and disseminated through the in the ADAPT International Bulletin (2000 subscribers) and HIVA-KU Leuven newsletter (4000 subscribers) (min. 7 – one per research BEN - in 24 months)**. Those articles will also form part of a **special issue of the ADAPT International Bulletin dedicated to the project**. Contents in Spanish language will be also disseminated through the **CIELO Laboral Newsletter (2200 subscribers)**.

In addition, **a summary of each National Highlight will be sent by research BENs to the corresponding EU-OSHA National Focal point. 2 special issues of the ADAPT International Bulletin and the CIELO Laboral Newsletter encompassing the Highlights will be released in M12**. In addition, the EU Interactive Guide will also be further disseminated 1) through its inclusion on the **Social Europe website and newsletter** in the form of an advertisement 2) during the **Metal Industry European Sectoral social dialogue committee**. With regard to the last point, the involvement of IndustriAll Europe in the project will prove to be crucial. The presentation will take place in the committee immediately following the realisation of the Guide, even if it is scheduled after the end of the project.

**A short presentation video of the Interactive Guide (D2.2) will be produced by DCU and launched during the Final Conference**. The video, whose contents will mainly be provided by FIM-CISL, will then be uploaded on YouTube (**COO and Fond. ADAPT**), and disseminated through social media accounts of

the project and of each partner. The video will be made in the English language and provided with subtitles in each target countries' language (IT, ES, SK, SI, FR, TR, NL) in order to maximise its impact.

The Youtube channels of COO and Fond. ADAPT will be also vehicle for the dissemination of the contents of the transnational training session of M20, which will be uploaded there and be available to the public also after the end of the project.

As for what concerns the Comparative Research Brief (D2.3), it will be published on the project webpage and on the CELSI website (under the section "[Research reports](#)").

Lastly, a crucial role with regard to dissemination activities will be played by the **Final conference, organized by FIM-CISL** during M24. The Final Conference will consist of a hybrid event with an in-person audience of min. 50 participants, who will be encouraged to share the EU Interactive Guide (D2.2) within their organisations and their networks, while an active social media campaign will take place during the conference to use the momentum and create a critical mass of attention to the project results on the day of the conference. **The event will take place in the EESC premises in Brussels to maximize its multiplier effect and enhance its visibility in the Brussels arena.**

**In compliance with the provisions set forth in project visual identity all written deliverables, the training template, agendas, press releases and articles will clearly show the European Union logo, the source of funding (included the nr. of Grant Agreement) and COO, BEN, AE and AP logos.**

### 3.3 Sustainability and continuation

#### Sustainability, long-term impact and continuation

*Describe the follow-up of the project after the EU funding ends. How will the project impact be ensured and sustained?*

*What will need to be done? Which parts of the project should be continued or maintained? How will this be achieved? Which resources will be necessary to continue the project? How will the results be used?*

*Are there any possible synergies/complementarities with other (EU funded) activities that can build on the project results?*

Firstly, the long-term impact of the project depends on the ability of ensuring that its **direct beneficiaries (i.e., trade unionists and workers' representatives) correctly acquire the main contents of the national and transnational training sessions.** To this end, particular attention will be paid to the **effectiveness of the training activities and to full and complete involvement of their participants.** Moreover, in order to improve the **accessibility and dissemination of training contents, training materials will be available on the project webpage also beyond the duration of the project:** the project webpage - which will be accessible for at least 3 years after the completion of the project, will make available to the public, besides the already mentioned outputs, also the **National Highlights (D2.1), and the Comparative Policy Brief (D2.3) which will serve as informative tools** in terms of regulatory framework concerning mental health protection in the workplace and insights into existing good collective practices on the topic in 7 countries (6 EU Member states and Turkey). Moreover, the transnational training session of M20 will be uploaded on the Youtube channels of COO and Fond. ADAPT, and remain available to the public for at least 3 years after the completion of the project.

The project's sustainability also depends on the **uptake of the European-level Interactive Guide.** In order to ensure that trade unions and workers' representatives in Europe and candidate countries are aware of the project results and make use of the Guide, this output will be **presented during the projects' Final conference and adequately disseminated through the partners' communication channels.** Moreover, the output, which will be produced in English, will be **translated into 27 EU official languages and Turkish and made available on the project webpage.**

The EU Interactive Guide will also be further disseminated during a **Metal Industry European Sectoral social dialogue committee.** With regard to the last point, the involvement of IndustriAll Europe in the project will prove to be crucial. The presentation will take place in the committee immediately following the realisation of the Guide, even if it is scheduled after the end of the project.

## 4. WORK PLAN, WORK PACKAGES, TIMING AND SUBCONTRACTING

### 4.1 Work plan

#### **Work plan**

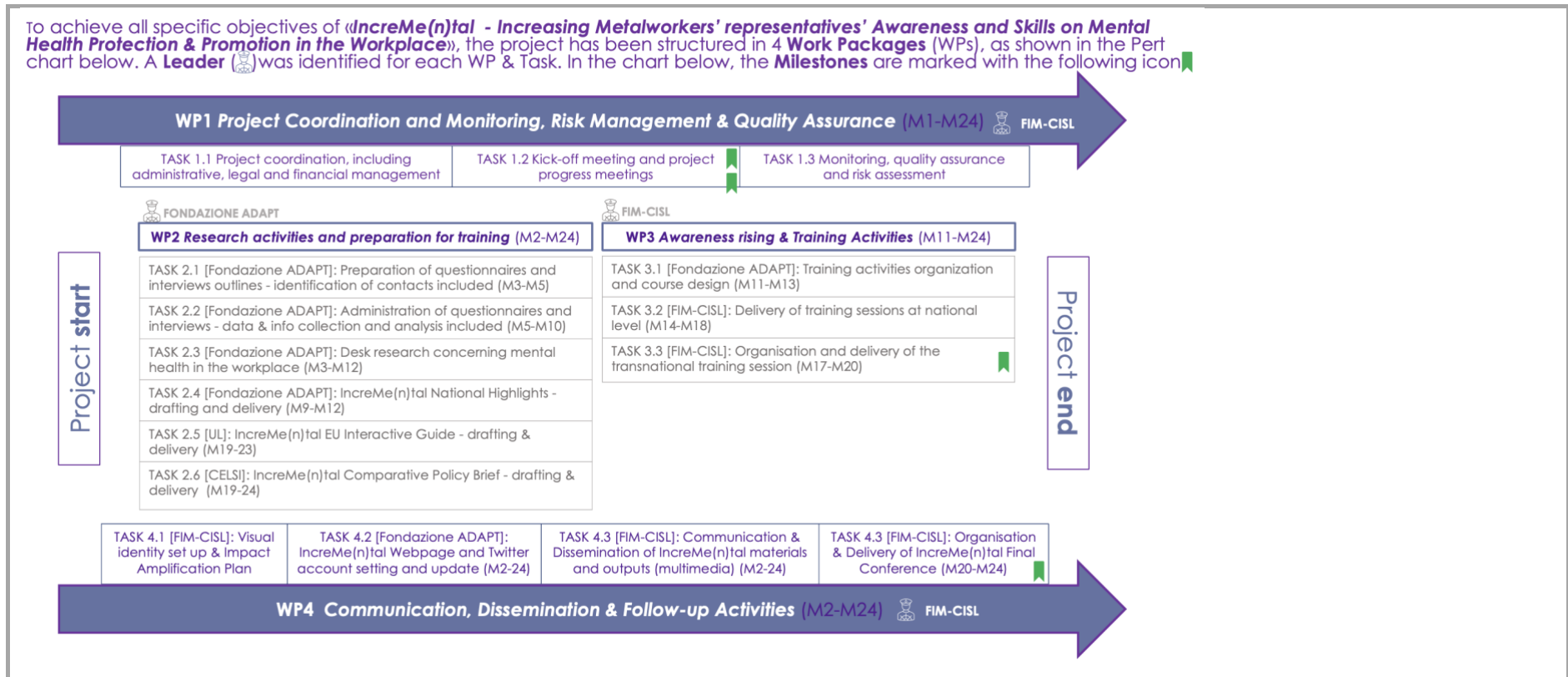
*Provide a brief description of the overall structure of the work plan (list of work packages or graphical presentation (Pert chart or similar)).*

The project will be structured in five work packages, declined as follows:

- WP1: Project coordination and monitoring, risk management and quality assurance
- WP2: Research activities and preparation for training
- WP3: Awareness raising & Training Activities
- WP4: Communication, Dissemination & Follow-up Activities

The following figure illustrates the overall structure of the work plan and the contribution of the BENs in terms of the co-ordination of the Tasks and WPs in which this project is organised.

#### **Figure 2**



## 4.2 Work packages and activities

# WORK PACKAGES

*This section concerns a detailed description of the project activities.*

*Group your activities into work packages. A **work package means a major sub-division of the project**. For each work package, enter an objective (expected outcome) and list the activities, milestones and deliverables that belong to it. The grouping should be logical and guided by identifiable outputs.*

*Projects should normally have a minimum of 2 work packages. WP1 should cover the management and coordination activities (meetings, coordination, project monitoring and evaluation, financial management, progress reports, etc) and all the activities which are cross-cutting and therefore difficult to assign to another specific work package (do not try splitting these activities across different work packages). WP2 and further WPs should be used for the other project activities. You can create as many work packages as needed by copying WP1.*

*For very simple projects, it is possible to use a single work package for the entire project (WP1 with the project acronym as WP name). For Operating Grants, use WP1 for ‘General management and running of the organisation’ and the last WP for ‘Dissemination and communication’. For Lump Sum Grants, please create one work package for each lump sum component.*

*Work packages covering financial support to third parties (⚠ only allowed if authorised in the Call document) must describe the conditions for implementing the support (for grants: max amounts per third party; criteria for calculating the exact amounts, types of activity that qualify (closed list), persons/categories of persons to be supported and criteria and procedures for giving support; for prizes: eligibility and award criteria, amount of the prize and payment arrangements).*

**⚠** Enter each activity/milestone/output/outcome/deliverable only once (under one work package).

**Work Package 1**

**Work Package 1: [Project coordination and monitoring, risk management and quality assurance]**

<b>Duration:</b>	M1 - M24	<b>Lead Beneficiary:</b>	FIM-CISL
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**Objectives**

*List the specific objectives to which this work package is linked.*

- to organise the smooth development and management of the project by coordinating the work of the consortium
- to consult, whenever necessary with the European Commission
- to coordinate and ensure timely production and submission of all deliverables
- to secure high quality of project outputs and deliverables
- to implement a monitoring, quality assurance and risk management system across all work packages

**Description of the activities (what, how, where) and division of work**

*Provide a concise overview of the work (planned tasks). Be specific and give a short name and number for each task.*

*Show who is participating in each task: Coordinator (COO), Beneficiaries (BEN), Affiliated Entities (AE), Associated Partners (AP), indicating **in bold** the task leader.*

*Add information on other participants’ involvement in the project e.g. subcontractors, in-kind contributions.*

**Note:**

*In-kind contributions: In-kind contributions for free are cost-neutral, i.e. cannot be declared as cost. Please indicate the in-kind contributions that are provided in the context of this work package.*

The Coordinator remains fully responsible for the coordination tasks, even if they are delegated to someone else. Coordinator tasks cannot be subcontracted. If there is subcontracting, please also complete the table below.					
Task No (continuous numbering linked to WP)	Task Name	Description	Participants		In-kind Contributions and Subcontracting (Yes/No and which)
			Name	Role (COO, AE, OTHER) BEN, AP,	
T1.1	Project coordination, including administrative, legal and financial management	<p><b>FIM CISL will guarantee timely and well-aligned project implementation according to high standards of quality, ensuring the cooperation between all partners across different WPs and liaising with WP leaders to ensure appropriate progress of activities in all WPs and tasks.</b> A detailed <b>Project Roadmap</b> will be developed to monitor the progress of each WP with a timeline and main milestones of their progression throughout the project. The roadmap will be the outcome of the Kick-off Meeting (M2). Moreover, FIM CISL will coordinate the relevant legal and administrative work, which includes but is not limited to preparation and signing of the <b>Consortium Agreement, and Data Protection and Ethics Policy</b> (implemented with the support of Fond. ADAPT) – which, together with the Project Roadmap, will compose the Administrative package set-up (D1.1), to be finalized by M3. All BENs will provide FIM-CISL with all necessary information to produce project documentation.</p> <p>FIM CISL will also coordinate the communication between beneficiaries, the European Commission and other stakeholders through the Funding and Tenders portal.</p> <p><b>Finally, under this WP, FIM CISL will ensure a sound overall administrative and financial management,</b> while monitoring progress throughout the life-time of the project (namely dealing with so-called 'continuous reporting' to the European Commission), and by developing interim (M12) and final (M24) administrative and financial reports.</p>	FIM-CISL  VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC  ADAPT	COO  BEN  AE	No
T1.2	Kick-off meeting and project progress meetings	This task includes the organization of a <b>hybrid Kick-off Meeting (KoM)</b> (4 hours) at the start of the project (M2), of 11 online bi-monthly meetings (1,5 hours each) to start in M3 and to end in M23, and <b>2 in-person Progress meetings</b> , to be organized in M12 and M24 (the latter in the context of the Final Conference – corresponding to the meeting mentioned in T1.3). The kick-off meeting aims to set the basis for partnership cooperation and launch WP1	FIM-CISL  VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU	COO  BEN	No

		<p>activities, while the bi-monthly meetings are aimed at promoting discussion among the partners on the progress made on research activities, training modules and dissemination initiatives and solve potential issues concerning the project across the different WPs.</p> <p>The first in-person Progress meeting (M12) will be aimed at evaluating the final research outputs and stimulate discussion regarding training organization and training materials; the second will instead be focused on the Final Quality Assessment of the training activities and research outputs (see T1.3).</p> <p>The KoM will be organised by FIM-CISL, and held in Rome at its premises, while the meeting on M12 will be organized by USC, and held in Santiago De Compostela. Further calls or online meetings could be organized upon request by one of the BEN should a need arise. For cost-effectiveness reasons, min. 1 person per BEN will attend the kick-off meeting and the in-person Progress meetings (M12-M24). Bi-monthly meetings will be attended remotely by min. 2 people per BEN as well as any possible other further online meetings. The KoM will be also participated (remotely) by 1 member of each AP involved in the project. Participation of APs in bi-monthly and progress meetings is on a voluntary basis.</p> <p>The <b>Quality Assessment Officer</b>, who will be officially appointed during the KoM, (see Task 1.3) will attend the Kick-off Meeting on M2, and the Progress meetings on M12 and M24. FIM-CISL will prepare the agenda of the KoM and the Progress meetings and provide minutes for both events.</p> <p>Travel and accommodation expenses for the QAO will be borne by the COO. With reference to the work languages, the main one will be English, while interpretation services are foreseen both for the KoM (ENG&lt;&gt;ES) and progress meetings (ENG&lt;&gt;ES). The costs incurred for these services will be borne by the coordinator and interpreters will be hired both for online and in-person meetings. This is possible due to the purchase of a 2-year Zoom Events and Webinar subscription which will also allow hybrid format events (KoM, Transnational training session, Final Conference). This service has been chosen on the basis of the best quality-price ratio in terms of features.</p>	<p>LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p> <p>QAO</p>	<p>AP</p> <p>AE</p>	
T1.3	Monitoring, quality assurance and risk assessment	<p>FIM-CISL will oversee the project implementation and verify the deliverables produced by the project BENs, also in collaboration with Lead BENs of various WPs and Tasks. <b>The quality control is further enhanced by the development of research outputs and training activities by renowned research institutes and universities with certified track records in projects studying mental health issues emerging in the employment context.</b> Moreover, an external expert (QAO) will be involved in the evaluation of research outputs and the discussion on the structure and contents of training</p>	<p>FIM-CISL</p> <p>VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p>	<p>COO</p> <p>BEN</p>	No

		<p>activities, especially in the context of the progress meetings to be held during M12 and M24.</p> <p>The monitoring and risk assessment approach for the project will be rolled out in a recurring, circular way, covering all the key processes and outputs, through: collection of inputs from all partners (including, whenever necessary APs) via calls and emails; continuous assessment of the project's progress, identification and evaluation of possible deviations or risks; risk mitigation (see § 2.7); identification of appropriate corrective measures (if needed) and their negotiation with BENs and the European Commission; cross-validation of deliverables to be carried out by all partners, regardless of their direct involvement in their production; online bi-monthly meetings to be participated by BENs. Project management and monitoring tools (i.e., Gantt Chart Baseline, common mailing group, cloud/online repository of documentation) will be deployed by FIM-CISL.</p> <p>During the context of the Final Conference (M24) all project partners will be involved in a <b>Final Quality Assessment meeting, also participated by the QAO: the outcome of the meeting will be a Final Quality Assessment Report for internal use (D1.2).</b></p>	<p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p> <p>QAO</p>	<p>AP</p> <p>AE</p>	
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**Milestones and deliverables (outputs/outcomes)**

**Milestones** are control points in the project that help to chart progress. Use them only for major outputs in complicated projects. Otherwise leave the section on milestones empty.

Means of verification are how you intend to prove that a milestone has been reached. If appropriate, you can also refer to indicators.

**Deliverables** are project outputs which are submitted to show project progress (any format). Refer only to major outputs. Do not include minor sub-items, internal working papers, meeting minutes, etc. Limit the number of deliverables to max 10-15 for the entire project. You may be asked to further reduce the number during grant preparation.

For deliverables such as meetings, events, seminars, trainings, workshops, webinars, conferences, etc., enter each deliverable separately and provide the following in the 'Description' field: invitation, agenda, signed presence list, target group, number of estimated participants, duration of the event, report of the event, training material package, presentations, evaluation report, feedback questionnaire.

For deliverables such as manuals, toolkits, guides, reports, leaflets, brochures, training materials etc., add in the 'Description' field: format (electronic or printed), language(s), approximate number of pages and estimated number of copies of publications (if any).

For each deliverable you will have to indicate a due month by when you commit to upload it in the Portal. The due month of the deliverable cannot be outside the duration of the work package and must be in line with the timeline provided below. Month 1 marks the start of the project and all deadlines should be related to this starting date.

The labels used mean:

Public — fully open 🚩 automatically posted online on the Project Results platforms)

Sensitive — limited under the conditions of the Grant Agreement

EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision [2015/444](#).

Milestone No (continuous numbering not linked to WP)	Milestone Name	Work Package No	Lead Beneficiary	Description	Due Date	Means of Verification
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					(month number)	
MS1	Kick-off meeting	1	FIM-CISL	The hybrid kick-off meeting (to be held in Rome) is aimed to set the basis for the cooperation among partners, strategic to the implementation of research activities and training organisation. The Project Roadmap will be discussed during this event. Min. 1 people for BEN and 3 people for COO will attend the event in presence. AP representatives will attend remotely with the exception of 1 representative of OZ KOVO, which will attend the event (compulsory – expenses covered by CELSI). The meeting will be carried out in English. Simultaneous interpretation (ENG<>ES) will be provided. Light lunch foreseen.	M2	Signed presence list and online attendance verification and recording of streamed event
MS2	1 <sup>st</sup> Progress meeting and 1 <sup>st</sup> Quality Check	1	USC	The first progress meeting (1 day), to be held in Santiago de Compostela (USC premises), is aimed at evaluating research outputs (namely D2.1) and stimulate discussion regarding training organization and materials. Min. 1 people for BEN (2 per USC), 1 person for COO will attend the event in presence. The meeting will be participated also by QAO. AP representatives could attend remotely with the exception of 1 representative of OZ KOVO, which will attend the event (compulsory – expenses covered by CELSI). The meeting will be carried out in English. Simultaneous interpretation (ENG<>ES) will be provided. Light lunch foreseen.	M12	Signed presence list and online attendance verification
MS3	2 <sup>nd</sup> Progress meeting and Final Quality Assessment	1	FIM-CISL	The second progress meeting (half day) to be held in Brussels - in the context of the projects' Final Conference - is aimed at providing a final evaluation of project outcomes and results. Min. 1 person for BEN, 2 people for COO, and 1 person for AE will attend in presence. The meeting will be participated also by the QAO. AP representatives will attend (1 person –	M24	Signed presence list and online attendance verification

Deliverable No (continuous numbering linked to WP)	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month number)	Description (including format and language)
D1.1	Administrative Package set up	1	FIM-CISL	R — Document	SEN — Sensitive	M3	Provision of the final version of the administrative related documents and templates including Project Roadmap, signed Consortium Agreement, Data & Ethics Management Policy (max 20 pages). Language: English
D1.2	Final Quality Assessment Report	1	FIM-CISL	R — Document	SEN — Sensitive	M24	PDF document of ca. 15 pages to be drafted by M23 and validated during the second progress meeting (M24). Contents: final evaluation of project outcomes and results. Language: English

Estimated budget — Resources										
Participant	Costs (n/a for prefixed Lump Sum Grants)									
	A. Personnel	B. Subcontracting	C.1 Travel	C.1 Accomodation	C.1 Subsistence	C.2 Equipment	C.3 Other goods, works	D.1 Financial support to third parties	E. Indirect costs	Total costs

	person months	€		n. travels	people travelling	€				and services	grants	€		€
FIM-CISL (COO)	4,5	€ 35.020,00	€ 0,00	1	2	€ 590,00	€ 234,00	€ 352,00	€ 2.800,00	€ 9.765,00	0	€ 0,00	€ 3.413,27	€ 52.174,27
Fondazione ADAPT	2,3	€ 7.900,00	€ 0,00	2	2	€ 439,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 619,43	€ 9.468,43
ADAPT_AE	0,5	€ 850,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 59,50	€ 909,50
USC	2	€ 9.910,00	€ 0,00	1	1	€ 295,00	€ 114,00	€ 147,00	€ 0,00	€ 1.900,00	0	€ 0,00	€ 865,62	€ 13.231,62
UGT-FICA	1,9	€ 7.820,00	0	1	1	€ 230,00	€ 114,00	€ 147,00	€ 0,00	€ 0,00	0	€ 0,00	€ 581,77	€ 8.892,77
KU Leuven	1,5	€ 13.940,00	0	2	2	€ 451,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 1.043,07	€ 15.944,07
VZW	1,5	€ 15.000,00	0	2	2	€ 451,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 1.117,27	€ 17.078,27
UL	1,5	€ 7.310,00	0	2	2	€ 491,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 581,77	€ 8.892,77
SKEI	1,5	€ 7.970,00	0	2	2	€ 491,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 627,97	€ 9.598,97
HACETTEPE UNI	2	€ 6.250,00	0	2	2	€ 866,00	€ 462,00	€ 372,00	€ 0,00	€ 0,00	0	€ 0,00	€ 556,50	€ 8.506,50
TMS	1,8	€ 4.630,00	0	2	2	€ 866,00	€ 462,00	€ 372,00	€ 0,00	€ 0,00	0	€ 0,00	€ 443,10	€ 6.773,10
DCU	1,7	€ 12.860,00	0	2	2	€ 516,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 972,02	€ 14.858,02
SIPTU	1,6	€ 9.080,00	0	2	2	€ 516,00	€ 231,00	€ 279,00	€ 0,00	€ 0,00	0	€ 0,00	€ 707,42	€ 10.813,42
CELSI	1,7	€ 6.460,00	0	2	4	€ 1.104,00	€ 462,00	€ 558,00	€ 0,00	€ 0,00	0	€ 0,00	€ 600,88	€ 9.184,88
Total	26	€ 145.000,00	€ 0,00	€ 23,00	€ 26,00	€ 7.306,00	€ 3.465,00	€ 3.901,00	€ 2.800,00	€ 11.665,00	€ 0,00	€ 0,00	€ 12.189,59	€ 186.326,59

**Work Package 2**

<b>Work Package 2: [Research activities and preparation for training]</b>					
<b>Duration:</b>	M2 - M24	<b>Lead Beneficiary:</b>	Fondazione ADAPT		
<b>Objectives</b>					
<i>List the specific objectives to which this work package is linked.</i>					
<ul style="list-style-type: none"> <li>To collect background information and conducting preliminary research supporting training activities.</li> <li>To shed light on topics connected to mental health prevention (regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers' mental health; links between workplace digitalization and workers' mental health; work environment, inequalities and workers' mental health) in seven target countries (IT, IE, ES, BE, TR, SK, SI) and at European-level. This information will be used by partners responsible for training activities, and collected in 1 European-level Interactive Guide and 1 Comparative Policy Brief to be disseminated in all EU27 countries + Turkey.</li> </ul>					
<b>Description of the activities (what, how, where) and division of work</b>					
<i>Provide a concise overview of the work (planned tasks). Be specific and give a short name and number for each task.</i>					
<i>Show who is participating in each task: Coordinator (COO), Beneficiaries (BEN), Affiliated Entities (AE), Associated Partners (AP), indicating <b>in bold</b> the task leader.</i>					
<i>Add information on other participants' involvement in the project e.g. subcontractors, in-kind contributions.</i>					
<b>Note:</b>					
<i>In-kind contributions: In-kind contributions for free are cost-neutral, i.e. cannot be declared as cost. Please indicate the in-kind contributions that are provided in the context of this work package.</i>					
<i>The Coordinator remains fully responsible for the coordination tasks, even if they are delegated to someone else. Coordinator tasks cannot be subcontracted.</i>					
<i>If there is subcontracting, please also complete the table below.</i>					
Task No (continuous numbering linked to WP)	Task Name	Description	Participants		In-kind Contributions and Subcontracting (Yes/No and which)
			Name	Role (COO, BEN, AE, AP, OTHER)	
T2.1	Preparation of questionnaires and interviews outlines - identification of contacts included	<b>Thanks to the collaboration with all research partners, Fond. ADAPT will design a questionnaire aimed at exploring key project topics, to be approved by all partners and then administered to workers employed in companies of the metalworking sector located in the countries covered by the project - with the support of the trade union BENs active in these countries.</b> The	Fond. ADAPT (lead) FIM-CISL VZW, CELSI, DCU, HACETTEPE, KU	BEN COO	No

		<p>questionnaire outline will be composed of standard multiple-choice questions and open-ended questions which may instead be diversified in each different country. The questionnaire will be administered via SurveyMonkey.</p> <p>Moreover, involving all research partners, Fond. ADAPT will draft two semi-structured interview outlines. The first outline will be needed to conduct interviews with company-level workers’ representatives active in the field of OSH (e.g., regarding the Italian context, RLS (Rappresentanti dei lavoratori per la sicurezza – Workers’ representatives for health and safety), sectoral-level trade unionists and companies (i.e., employers/HR managers) in the metalworking sector; the second will be used to interview members of European-level/international representative organisations (e.g., IndustriAll Europe; CEEMET; ILO) with specific expertise in OSH matters. Both interview outlines will be validated by trade union partners.</p> <p>Trade union partners (BENs &amp; APs) will identify suitable respondents and interviewees in countries covered by the project and support the circulation of the questionnaire by M4. Notably, FIM-CISL will identify interviewees and respondents in IT; UGT-FICA in ES; VZW in BE; OZ KOVO in SK; SKEI in SI; SIPTU in IE; TMS in TR.</p> <p>The questionnaire and interview outlines will be produced in English by ADAPT and then translated in national languages by each research partner. Interviews will be recorded and transcribed with the help of a translation software.</p>	<p>LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>ADAPT</p> <p>OZ KOVO</p>	<p>BEN</p> <p>AE</p> <p>AP</p>	
T2.2	Administration of questionnaires and interviews - data & info collection and analysis included	<p>The questionnaire will be administered by research partners to workers employed in companies in the metalworking sector located in the countries covered by the project (min. 30 per country). These will be hosted by an online software (SurveyMonkey) or administered by hand (when necessary to reach project targets). The interviews will take place by phone or online communication tools by research partners using contacts provided by trade union partners (see below). Notably, Fond. ADAPT is responsible for administering questionnaires and interviews in IT; USC for ES; KU Leuven for BE; Celsi for SK; UL for SI; DCU for IE; HACETTEPE for TR. KU Leuven will conduct the interviews also with members of European-level/international representative organisations (e.g., IndustriAll Europe; CEEMET; ILO) In-person interviews will occur if they don’t require any additional travel and accommodation expenses. Interviews to workers’ representatives/sectoral trade unionists/companies can be carried out</p>	<p>Fond. ADAPT (lead)</p> <p>FIM-CISL</p> <p>VZW, CELSI, DCU, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p>	<p>BEN</p> <p>COO</p> <p>BEN</p> <p>AP</p> <p>AE</p>	No

		<p>in national languages; interviews to international respondents will be carried out in English. All interviews must be recorded (interviewees’ consent will be appropriately collected). The recordings will be destroyed after the end of the project.</p> <p><b>Target quality check concerning the nr. of respondents engaged:</b></p> <ul style="list-style-type: none"> <li>- Administration of the questionnaire and reception of at least 30 completed responses per selected country.</li> <li>- Conduction of interviews with at least 2 workers’ representatives active in OSH + 1 sectoral trade unionist + 2 companies per selected country.</li> <li>- Conduct of interviews with at least 3 international-level respondents.</li> </ul> <p>All respondents’ information will be securely stored in Survey Monkey data centres (along with being able to draw it down in excel).                  Means of verification: interview recordings (only audio).</p>			
T2.3	Desk research concerning mental health in the workplace	<p><b>All research partners will carry out desk research aimed at collecting and analysing scientific literature and institutional reports concerning the issue of mental health risks in the workplace, but also at gathering best practices to use as informative materials in the context of training activities. Social dialogue practices and collective agreements (at national, territorial and company-level) will also be included in the desk research as valuable sources – focusing specifically on the metalworking sector. “Tripartite plus” practices will be integrated in the research if available to inform the transnational training session.</b></p> <p>Namely, the desk research conducted for each target country will be focused on 1) the regulatory framework for the prevention of psychosocial risks and management of the consequences of any pathologies related to workers’ mental health 2) links between workplace digitalization and workers’ mental health 3) work environment, inequalities and workers’ mental health. Each stream of research will correspond to a dedicated training session at national level (see T3.2).</p> <p>Fond. ADAPT is responsible for conducting the analysis for IT; USC for ES; KU Leuven for BE; Celsi for SK; UL for SI; DCU for IE.</p> <p>FIM-CISL, VZW, SIPTU, OZ KOVO, SKEI, UGT-FICA and IndustriAll Europe will provide research partners additional documentation and CLAs to integrate the analysis.</p>	<p>Fond. ADAPT (lead)</p> <p>FIM-CISL</p> <p>VZW, CELSI, DCU, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p>	<p>BEN</p> <p>COO</p> <p>BEN</p> <p>AP</p> <p>AE</p>	No

		The minimum nr. of sources to be used in the desk research will be the object of decision during the KoM and verified by the QAO during the first progress meeting (M12 – see WP1).			
T2.4	IncreMe(n)tal National Highlights - drafting and delivery	<p>Using the data collected during T2.2. and T2.3, all research partners will be responsible for drafting a document (around 25 pages each + annexes) for each selected country. The National highlights will be drafted in English for internal use, timely submitted to the QAO for his/her validation and then translated in each country’s national languages to maximise their dissemination impact (research BENs have already provided their decision concerning the opportunity to go for in-house translation or outsourcing this activity: this is reflected in the budget). A language register will be used which is appropriate for the readers and the purpose of the document.</p> <p><b>In order to facilitate their access by the selected target audience (trade unionists, workers’ representatives, workers, OSH practitioners, companies) the Highlight will adopt a user-friendly layout and approach (using a common template to be provided by Fond. ADAPT), including a synthetic literature review of selected sources, but also sections dedicated to fictional cases and a FAQ section.</b> Among the annexes of the National Highlights, a self-standing annex covering tips and guidance for organizational-level interventions in protecting and promoting mental health in the workplace will be provided. The finalized National Highlights (D2.1) will also serve as background material to structure the national training activities foreseen by the project (see T3.2).</p> <p>After evaluation by the QAO during the progress meeting of M12, the National Highlights will be uploaded on the project webpage and disseminated through partners’ social media accounts (including the projects’ Twitter account – see WP5). In addition, a summary of each National Highlight will be sent by each research BEN to the corresponding EU-OSHA <a href="#">National Focal point</a>. Two special issues of the ADAPT International Bulletin and the CIELO Laboral Newsletter will be released encompassing all the Highlights (for more details, see WP4 and § 3.2)</p>	Fond. ADAPT (lead), CELSI, DCU, HACETTEPE, KU Leuven, UL, USC ADAPT QAO	BEN AE	No
T2.5	IncreMe(n)tal EU Interactive Guide - drafting & delivery	Using the inputs collected through previous research phases and the transnational training session (see T3.3), UL, with the support of Fond. ADAPT (which will be mainly in charge of releasing the online version of the Guide), will draft a <b>European-level interactive Guide dedicated</b>	UL (lead) FIM-CISL	BEN COO	

		<p><b>to the project topics. The dissemination will be carried out through the means of communication described in WP5 (webpage; social media).</b></p> <p>The Guide will be drafted in English and validated by all partners. Its translation in all EU27 languages and Turkish will be ensured by an automatic translation plug-in to be installed on the project webpage. The EU Interactive Guide will be presented during the Final Conference (see T4.4), and then disseminated through the project webpage and Twitter account.</p> <p>The QAO will be asked to provide feedback on the content of the draft version of the Guide by M22.</p>	<p>VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>ADAPT</p> <p>QAO</p>	<p>BEN</p> <p>AE</p>	
T2.6	IncreMe(n)tal Comparative Policy Brief - drafting & delivery	<p>Under the coordination of CELSI, Research BENs will deliver a Comparative Policy Brief, building from the results of the National Highlights. The document will be structured in different chapters, each dedicated to the result of research activities conducted in target countries, plus one comparative chapter to be drafted by CELSI. The Brief will be published on the project webpage and on the CELSI website (under the section "<a href="#">Research reports</a>"). All BENs involved will be asked to provide feedback and any additional information useful to the completion of the document.</p> <p>The QAO could be involved on voluntary basis in the drafting of the policy brief preface.</p>	<p>CELSI (lead), DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, UL, USC</p> <p>ADAPT</p>	<p>BEN</p> <p>AE</p>	

**Milestones and deliverables (outputs/outcomes)**

**Milestones** are control points in the project that help to chart progress. Use them only for major outputs in complicated projects. Otherwise leave the section on milestones empty.

Means of verification are how you intend to prove that a milestone has been reached. If appropriate, you can also refer to indicators.

**Deliverables** are project outputs which are submitted to show project progress (any format). Refer only to major outputs. Do not include minor sub-items, internal working papers, meeting minutes, etc. Limit the number of deliverables to max 10-15 for the entire project. You may be asked to further reduce the number during grant preparation.

For deliverables such as meetings, events, seminars, trainings, workshops, webinars, conferences, etc., enter each deliverable separately and provide the following in the 'Description' field: invitation, agenda, signed presence list, target group, number of estimated participants, duration of the event, report of the event, training material package, presentations, evaluation report, feedback questionnaire.

For deliverables such as manuals, toolkits, guides, reports, leaflets, brochures, training materials etc., add in the 'Description' field: format (electronic or printed), language(s), approximate number of pages and estimated number of copies of publications (if any).

For each deliverable you will have to indicate a due month by when you commit to upload it in the Portal. The due month of the deliverable cannot be outside the duration of the work package and must be in line with the timeline provided below. Month 1 marks the start of the project and all deadlines should be related to this starting date.

The labels used mean:



Public — fully open (🚩 automatically posted online on the Project Results platforms) Sensitive — limited under the conditions of the Grant Agreement EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision <a href="#">2015/444</a> .							
Milestone No (continuous numbering not linked to WP)	Milestone Name	Work Package No	Lead Beneficiary	Description		Due Date (month number)	Means of Verification
//							
Deliverable No (continuous numbering linked to WP)	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month number)	Description (including format and language)
D2.1	IncreMe(n)tal National Highlights	2	Fond. ADAPT	R — Document, report	[PU — Public]	M12	7 Pdf documents (around 25 pages each). National languages.
D2.2	IncreMe(n)tal EU Interactive Guide	2	UL	OTHER — Website	[PU — Public]	M23	Interactive resource (about 20 pages). EU27 languages + Turkish (automatic translation)
D2.3	IncreMe(n)tal Comparative Policy Brief	2	CELSI	R — Document, report	[PU — Public]	M24	PDF document (around 15 pages). English

Estimated budget — Resources												
Participant	Costs (n/a for prefixed Lump Sum Grants)											
	A. Personnel		B. Subcontracting	C.1 Travel			C.1 Accommodation	C.1 Subsistence	C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties grants €	E. Indirect costs
person months	€	n. travels		people travelling	€							

FIM-CISL (COO)	0,5	€ 3.670,00	0	0	0	0	0	0	0	0	0	0	€ 256,90	€ 3.926,90
Fondazione ADAPT	3,1	€ 7.920,00	€ 0,00	2	4	€ 922,00	€ 574,00	€ 579,00	€ 610,00	€ 75,00	0	€ 0,00	€ 747,60	€ 11.427,60
ADAPT_AE	1,5	€ 4.440,00	€ 0,00	1	3	€ 627,00	€ 342,00	€ 441,00	€ 0,00	€ 0,00	0	€ 0,00	€ 409,50	€ 6.259,50
USC	3,5	€ 17.770,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 1.575,00	0	€ 0,00	€ 1.354,15	€ 20.699,15
UGT-FICA	0,7	€ 2.950,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 206,50	€ 3.156,50
KU Leuven	3,5	€ 28.350,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 3.370,00	0	€ 0,00	€ 2.220,40	€ 33.940,40
VZW	0,8	€ 8.000,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 560,00	€ 8.560,00
UL	4	€ 23.840,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 1.845,00	0	€ 0,00	€ 1.797,95	€ 27.482,95
SKEI	0,8	€ 4.250,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 297,50	€ 4.547,50
HACETTEPE UNI	3,4	€ 10.700,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 1.620,00	0	€ 0,00	€ 862,40	€ 13.182,40
TMS	0,7	€ 1.500,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 105,00	€ 1.605,00
DCU	3,2	€ 23.720,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 120,00	0	€ 0,00	€ 1.668,80	€ 25.508,80
SIPTU	0,5	€ 2.740,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 191,80	€ 2.931,80
CELSI	4	€ 12.510,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 1.370,00	0	€ 0,00	€ 971,60	€ 14.851,60
Total	30,2	€ 152.360,00	€ 0,00	€ 3,00	€ 7,00	€ 1.549,00	€ 916,00	€ 1.020,00	€ 610,00	€ 9.975,00	€ 0,00	€ 0,00	€ 11.650,10	€ 178.080,10

**Work Package 3**

<b>Work Package 3: Awareness raising and training activities</b>			
<b>Duration:</b>	M11 - M24	<b>Lead Beneficiary:</b>	FIM-CISL

Objectives					
<p>List the specific objectives to which this work package is linked.</p> <ul style="list-style-type: none"> <li>Provision of quality training to groups of workers’ representatives and trade unionists in the target countries and at a transnational level, building on research activities. Training contents: regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers’ mental health; links between workplace digitalization and workers’ mental health; work environment, inequalities and workers’ mental health.</li> </ul>					
Description of the activities (what, how, where) and division of work					
<p>Provide a concise overview of the work (planned tasks). Be specific and give a short name and number for each task.                      Show who is participating in each task: Coordinator (COO), Beneficiaries (BEN), Affiliated Entities (AE), Associated Partners (AP), indicating <b>in bold</b> the task leader.                      Add information on other participants’ involvement in the project e.g. subcontractors, in-kind contributions.</p> <p><b>Note:</b>                      In-kind contributions: In-kind contributions for free are cost-neutral, i.e. cannot be declared as cost. Please indicate the in-kind contributions that are provided in the context of this work package.                      The Coordinator remains fully responsible for the coordination tasks, even if they are delegated to someone else. Coordinator tasks cannot be subcontracted.                      If there is subcontracting, please also complete the table below.</p>					
Task No (continuous numbering linked to WP)	Task Name	Description	Participants		In-kind Contributions and Subcontracting (Yes/No and which)
			Name	Role (COO, BEN, AE, AP, OTHER)	
T3.1	Training activities organization and course design	<p><b>Training activities, as well as a common framework for the training materials (so-called “Training package” - TP), will be designed by the research partners and discussed during the first progress meeting (M12, see WP1). For each of the countries involved, the TP will be composed of materials and resources in English and national languages. The TP will be finalized by M13 (and in any case before the start of the training activities in each country).</b></p> <p><b>Namely, the TP will be composed of three thematic training toolkits (TT) (one for each training module) each containing at least one PPT presentation in national languages and an essential bibliography (“Reading list”) useful for participants.</b> These materials will be validated by the QAO in the context of the first Progress meeting (M12).</p>	Fond. ADAPT (lead) FIM-CISL VZW, CELSI, DCU, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC OZ KOVO ADAPT QAO	BEN COO BEN AP AE	No

		<p>Fond. ADAPT will, in agreement with all research partners, provide guidelines for the composition of the TP, ensuring the greatest possible uniformity in terms of minimum quality standards concerning training.</p> <p>All TT, organized thematically and by language, will be publicly available on the project webpage.</p>			
T3.2	Delivery of training sessions at national level	<p>The national training activities will be structured in three modules with different content, following the topics covered by the research activities of WP2:</p> <ul style="list-style-type: none"> <li>- Module #1 (M14): Theoretical and Regulatory framework for the prevention of psycho-social risks and management of the consequences of any pathologies related to workers' mental health. In particular, for each target country of the project, the reference bodies, the main features of the legislation (national and European), the collective bargaining instruments currently provided for this purpose, and the corporate responsibility in this field, will be identified and mapped.</li> <li>- Module #2 (M16): Links between digitalization and mental health. In particular, the elements and conditions affecting workers' well-being in the so-called 'digital workplace' - including the effects of the use of the most advanced technological tools for monitoring work performance, linked to the use of artificial intelligence, algorithms and machine learning - will be investigated. This focus will also take into account the different categories of the workforce – differentiated for example by age, gender, job/organization characteristics, contractual arrangements, level of responsibility – and how digitalization impacts their mental health. Lastly, looking at the international evidence, it will be possible to emphasize aspects relating to the broader transformations connected with digitalization.</li> <li>- Module #3 (M18): Work environment, inequalities and workers' mental health. This will focus on both the issue of 'well-being at work' and the working environment, and also on inequalities within the workforce - which can also give rise to discrimination in the workplace (not only in light of factors such as age and gender – see ILO Convention 190, 2019 - but also between workers with standard and 'atypical' contracts). A specific focus concerning environmental factors “external” to the workplace which may impact workers’ mental health (e.g., climate change) will also be provided.</li> </ul> <p>Each module will be organized in a one-day training session lasting 5 hours each (3 in the morning, 2 in the afternoon). The teaching faculty</p>	<p>FIM-CISL (lead)</p> <p>VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO</p> <p>ADAPT</p> <p>QAO</p>	<p>COO</p> <p>BEN</p> <p>AO</p> <p>AE</p>	<p>YES (CISL premises made available for hosting n. 2 national level training sessions in Rome -IT-)</p>

		<p>will be mainly composed by research BEN experts, but can be expanded to external lecturers on the basis of their availability in the scheduled dates, invited after they will be identified and agreed upon by partners.</p> <p>The training methodologies used during each session will be aimed at stimulating exchanges and discussions among participants and at providing trainees with practical knowledge to deal with mental health issues in the workplace in their daily activities (i.e., use of fictional case simulations).</p> <p>Fond. ADAPT is responsible for conducting the training session in IT; USC in ES; KU Leuven in BE; CELSI in SK; UL in SI; DCU in IE; HACETTEPE in TR.</p> <p>FIM-CISL, VZW, SIPTU, OZ KOVO, SKEI, UGT-FICA, TMS will take care of the organization of 2 out of 3 of the mentioned training sessions, while 1 out of 3 training session will be organised in the premises of research BENs. Trade union BENs will in any case identify and involve training participants in their country of activity for each of the three sessions. Target participants: sectoral/territorial trade unionists and workers’ representatives on company-level.</p> <p>An evaluation questionnaire assessing the quality of the training received and the skills acquired by participants will be produced by the research partners in their national languages and administered in hard copy in the last 15 minutes of each national training session. Afterwards, each research partner will be responsible for producing a summary of the results of max. 2 pages in ENG, which will be integrated in specific deliverable named Training evaluation report (D3.3 - M24) – to be drafted by FIM-CISL. The questionnaire will be structured as follows: a "standard" part concerning training quality indicators common to all modules and a tailored section depending on the specific contents of the actual training modules.</p> <p>The assessment questionnaire will be validated by the QAO in the context of the first Progress meeting (M12).</p> <p>Overall, training activities will be planned coherently across all countries involved thanks to the discussion concerning the TP taking place during the Progress meeting of M12 (see WP1)</p> <p>Training activities will be carried out in the national languages of each target country (in BE, NL will be the working languages).</p> <p>Target audience for each training module: 15 to 20 participants (per country) – total: max 140 people trained. A light lunch will be provided.</p>			
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T3.3	Organisation and provision of the national transnational training session	<p><b>This task concerns the organization of a hybrid half-day transnational training session, to be organised by FIM-CISL in Ankara (TR) during M20, focusing on the topic of mental health risks prevention from an international perspective.</b> In particular, this topic will be explored by:</p> <ul style="list-style-type: none"> <li>- International/EU level experts (e.g., from the European Commission, EU-OSHA, Eurofound, WHO, ILO) to be identified by M18.</li> <li>- IndustriAll professionals, who will describe their initiatives aimed at safeguarding European workers’ mental health.</li> <li>- The QAO, in light of its consolidated experience in that regard.</li> <li>- Additional intervention by research BEN will be decided by M18.</li> </ul> <p>FIM-CISL will chair the event and deal with its general organization with the support of TMS.</p> <p>The transnational training session’s agenda will be discussed and approved by BENs and APs during the bi-monthly meeting of M18. The agenda will be made available on the project webpage and disseminated in order to reach additional potential participants (online). The organization of this hybrid session will contribute to expanding the target audience beyond the national training sessions: in fact, not only members of the project’s trade union partners, but trade unionists and workers’ representatives of the metalworking sector of all EU27 and candidate countries will be invited to participate to the session thanks to the COO consolidated network and IAE.</p> <p>The transnational training session will be carried out, where coherent with the actual project timeline, in conjunction with the meeting of the 2025/2026 Permanent Conference of the Metalworkers’ Trade Unions of the European countries in the Mediterranean area, which will take place in Turkey.</p> <p>After the end of the session, FIM-CISL will be responsible for producing a summary of the results of the session of max. 3 pages in ENG, which will form part of a specific deliverable named Training evaluation report (D3.3 - M24).</p> <p>Target audience: min. 100 training participants (max 50 in person, remainder online). 1 representative for each BEN (COO included) will travel to Ankara, together with the QAO and 1 representative from OZ KOVO (covered by CELSI budget).</p> <p>The transnational session will be carried out in English. Simultaneous interpretation will be provided for each target countries’ languages (IT, ES, SK, SI, FR, TR, NL).</p>	<p>FIM-CISL</p> <p>VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p> <p>QAO</p>	<p>COO</p> <p>BEN</p> <p>AP</p> <p>AE</p>	<p>YES (Availability of at least one representative of <a href="#">Mental Health Europe</a> to speak at the transnational training session – remotely)</p>
<b>Milestones and deliverables (outputs/outcomes)</b>					

**Milestones** are control points in the project that help to chart progress. Use them only for major outputs in complicated projects. Otherwise leave the section on milestones empty.  
 Means of verification are how you intend to prove that a milestone has been reached. If appropriate, you can also refer to indicators.  
**Deliverables** are project outputs which are submitted to show project progress (any format). Refer only to major outputs. Do not include minor sub-items, internal working papers, meeting minutes, etc. Limit the number of deliverables to max 10-15 for the entire project. You may be asked to further reduce the number during grant preparation.  
 For deliverables such as meetings, events, seminars, trainings, workshops, webinars, conferences, etc., enter each deliverable separately and provide the following in the 'Description' field: invitation, agenda, signed presence list, target group, number of estimated participants, duration of the event, report of the event, training material package, presentations, evaluation report, feedback questionnaire.  
 For deliverables such as manuals, toolkits, guides, reports, leaflets, brochures, training materials etc., add in the 'Description' field: format (electronic or printed), language(s), approximate number of pages and estimated number of copies of publications (if any).  
 For each deliverable you will have to indicate a due month by when you commit to upload it in the Portal. The due month of the deliverable cannot be outside the duration of the work package and must be in line with the timeline provided below. Month 1 marks the start of the project and all deadlines should be related to this starting date.  
 The labels used mean:  
 Public — fully open (🚩 automatically posted online on the Project Results platforms)  
 Sensitive — limited under the conditions of the Grant Agreement  
 EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision [2015/444](#).

Milestone No (continuous numbering not linked to WP)	Milestone Name	Work Package No	Lead Beneficiary	Description		Due Date (month number)	Means of Verification
MS3	Transnational training session	3	FIM-CISL	The hybrid transnational training session (to be held in Ankara) is aimed at providing trade unionists with a focus on the topic of mental health risks prevention from a “European” perspective. Target audience: 100 participants (max 50 in presence, the others online). The transnational session will be carried out in English. Simultaneous interpretation will be provided in target countries’ languages (ES, SK, SI, IT, FR, TR).		M20	Signed presence list, online attendance verification, recording of streamed event (English version).
Deliverable No (continuous numbering linked to WP)	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month number)	Description (including format and language)
D3.1	National training sessions	3	FIM-CISL	OTHER [Training]	[PU - Public]	M18	Three one-day in-person training sessions lasting 5 hours each (3 in the morning, 2 in the

							<p>afternoon) organized in each target country. Training activities will be carried out in the national languages of each target country. Target audience for each training module: 15 to 20 participants (per country). Agendas to be made available on the project webpage in advance to the training delivery. A PDF document encompassing all national-level training agendas will be uploaded on the EC continuous reporting section.</p>
D3.2	Transnational training session	3	FIM-CISL	OTHER [Training]	[PU - Public]	M20	<p>One hybrid half-day transnational training session, to be organised by FIM-CISL and TMS in Ankara.</p> <p>Target audience: 100 participants (max 50 in presence, the others online).</p> <p>Language: English + simultaneous interpretation to be provided in target countries' languages (IT, SP, SK, SI, FR, TR, NL). Agenda to be made available on the project webpage in advance to the training delivery. The PDF document will be uploaded on the EC</p>



							continuous reporting section.
D3.3	Training evaluation Report	3	FIM-CISL	R - Document	[SEN - Sensitive]	M24	PDF document of max 15 pages composed of summaries of the results of national training sessions drafted by research BENS + summary of the results of the transnational training session drafted by FIM-CISL. Language: English

Estimated budget — Resources														
Participant	Costs (n/a for prefixed Lump Sum Grants)													
	A. Personnel		B. Subcontracting	C.1 Travel			C.1 Accomodation	C.1 Subsistence	C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties		E. Indirect costs	Total costs
	person months	€		n. travels	people travelling	€					grants	€		
FIM-CISL (COO)	1	€ 7.370,00	€ 0,00	2	32	€ 2.150,00	€ 464,00	€ 330,00	€ 0,00	€ 1.250,00	0	€ 0,00	€ 809,48	€ 12.373,48
Fondazione ADAPT	0,8	€ 2.220,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 625,00	0	€ 0,00	€ 199,15	€ 3.044,15
ADAPT_AE	0,5	€ 850,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 59,50	€ 909,50
USC	0,7	€ 3.620,00	€ 0,00	2	5	€ 1.217,00	€ 700,00	€ 490,00	€ 0,00	€ 0,00	0	€ 0,00	€ 421,89	€ 6.448,89
UGT-FICA	0,9	€ 3.790,00	€ 0,00	3	33	€ 3.825,00	€ 1.636,00	€ 1.194,00	€ 0,00	€ 1.350,00	0	€ 0,00	€ 825,65	€ 12.620,65
KU Leuven	0,7	€ 5.890,00	€ 0,00	2	4	€ 571,00	€ 232,00	€ 138,00	€ 0,00	€ 0,00	0	€ 0,00	€ 478,17	€ 7.309,17

VZW	1	€ 10.000,00	€ 0,00	2	49	€ 2.641,00	€ 232,00	€ 138,00	€ 0,00	€ 4.545,00	0	€ 0,00	€ 1.228,92	€ 18.784,92
UL	0,7	€ 4.310,00	€ 0,00	1	1	€ 295,00	€ 232,00	€ 138,00	€ 0,00	€ 625,00	0	€ 0,00	€ 392,00	€ 5.992,00
SKEI	0,8	€ 4.250,00	€ 0,00	2	31	€ 1.105,00	€ 232,00	€ 138,00	€ 0,00	€ 1.250,00	0	€ 0,00	€ 488,25	€ 7.463,25
HACETTEPE UNI	0,8	€ 2.500,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 625,00	0	€ 0,00	€ 218,75	€ 3.343,75
TMS	1,2	€ 3.270,00	€ 0,00	2	40	€ 1.200,00	€ 0,00	€ 0,00	€ 0,00	€ 7.300,00	0	€ 0,00	€ 823,90	€ 12.593,90
DCU	0,7	€ 5.540,00	€ 0,00	1	1	€ 433,00	€ 232,00	€ 138,00	€ 0,00	€ 875,00	0	€ 0,00	€ 505,26	€ 7.723,26
SIPTU	1,1	€ 4.860,00	€ 0,00	2	31	€ 1.513,00	€ 232,00	€ 138,00	€ 0,00	€ 1.750,00	0	€ 0,00	€ 594,51	€ 9.087,51
CELSI	0,8	€ 3.510,00	€ 0,00	2	32	€ 1.060,00	€ 464,00	€ 275,00	€ 0,00	€ 1.875,00	0	€ 0,00	€ 502,88	€ 7.686,88
<b>Total</b>	<b>11,7</b>	<b>61980</b>	<b>0</b>	<b>21</b>	<b>259</b>	<b>16010</b>	<b>4656</b>	<b>3117</b>	<b>0</b>	<b>22070</b>	<b>0</b>	<b>0</b>	<b>7548,31</b>	<b>115381,31</b>

*Work package 4*

<b>Work Package 4: Communication, dissemination and follow-up activities</b>			
<b>Duration:</b>	M2 - M24	<b>Lead Beneficiary:</b>	FIM-CISL
<b>Objectives</b>			
<i>List the specific objectives to which this work package is linked.</i>			
<ul style="list-style-type: none"> <li>To implement communication and dissemination activities and events in order to promote IncreMe(n)tal results and maximize the project impact towards relevant stakeholders, policymakers and the general public.</li> </ul>			
<b>Description of the activities (what, how, where) and division of work</b>			

Provide a concise overview of the work (planned tasks). Be specific and give a short name and number for each task.  
 Show who is participating in each task: Coordinator (COO), Beneficiaries (BEN), Affiliated Entities (AE), Associated Partners (AP), indicating **in bold** the task leader.  
 Add information on other participants’ involvement in the project e.g. subcontractors, in-kind contributions.  
**Note:**  
 In-kind contributions: In-kind contributions for free are cost-neutral, i.e. cannot be declared as cost. Please indicate the in-kind contributions that are provided in the context of this work package.  
 The Coordinator remains fully responsible for the coordination tasks, even if they are delegated to someone else. Coordinator tasks cannot be subcontracted.  
 If there is subcontracting, please also complete the table below.

Task No (continuous numbering linked to WP)	Task Name	Description	Participants		In-kind Contributions and Subcontracting (Yes/No and which)
			Name	Role (COO, BEN, AE, AP, OTHER)	
T4.1	Visual identity set up & Impact Amplification Plan	In order to provide the project with appropriate external identifiability, by M3 FIM-CISL will provide BENs and APs with a logo of the project and a full set of templates devoted at (1) consolidating the project branding and visual branding, (2) improving BEN and AP commitment in disseminating project results and achievements with common visual standards.  FIM-CISL, with the support of Fond. ADAPT, will also develop an Impact amplification Plan (D4.1) which will detail all communication and dissemination activities planned for the project and their potential impact. The Plan will be shared with partners by M3.	FIM-CISL  Fond. ADAPT  ADAPT	COO  BEN  AE	No
T4.2	Incremental Webpage and Twitter account setting and update	Fond. ADAPT will host the official webpage of the project, which will be created by M2 and regularly updated by Fond. ADAPT staff, in agreement with FIM-CISL as COO. All BENs will provide compulsory materials (deliverables) in due time, using project templates and approved editorial norms for their upload. The webpage will be designed in compliance with the project visual identity standards and will display the main project outputs. APs will contribute to the implementation of the “news” section of the webpage by providing relevant materials.  A Twitter account of the project will be created by Fond. ADAPT (by M3): credentials of the Twitter account will be shared with all research partners, who will manage it in 3-month-turns. A specific hashtag	Fond. ADAPT (lead)  FIM-CISL  VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC  OZ KOVO, IndustriAll Europe	BEN  COO  BEN  AP	No

		dedicated to the project (#IncreMENTAL_EU) will be used to disseminate relevant project materials and outputs through the partners' main communication channels.	ADAPT	AE	
T4.3	Communication & Dissemination of IncreMe(n)tal materials and outputs (multimedia)	<p>All BENs and APs are committed to disseminate relevant project materials and outputs through their main communication channels. Specific instructions concerning dissemination activities will be provided by FIM-CISL as WP leader to interested BENs and APs (considering their different level of involvement in the project), every time a new project material or output will be produced – coherently with the contents of the Impact and amplification plan (D4.1). Notably, partners will be asked to circulate: the research outputs (National Highlights, EU Interactive Guide; Comparative Policy Brief); the transnational training session agenda; the Final Conference agenda. To involve all BENs and APs in these activities and make them responsible for the success of dissemination, an excel spreadsheet will be provided by FIM-CISL to all BENs and APs, which will be asked to report the evidences of main communication and dissemination activities carried out (i.e., tweets, posts online, interviews, media articles, newsletters, events, etc.). This activity will facilitate the updating of the sections dedicated to dissemination and communication activities on the continuous reporting platform of the EC.</p> <p><b>The dissemination of project outputs and events will benefit from the multiplier effect of Fond. ADAPT being media partner of the next EU-OSHA campaign (<a href="#">Safe and Healthy Work in the Digital Age</a>, running from 2023 to 2025) and being partner of the OECD/ILO <a href="#">Global Deal</a> initiative together with UGT and IAE.</b></p> <p>Project events will (when possible) be organised in conjunction with the meeting of the 2025/2026 Permanent Conference of the Metalworkers' Trade Unions of the European countries in the Mediterranean area (notably, the transnational training session of M20) - also to make the best usage of TMS premises available – but also in parallel with relevant initiatives concerning mental health organized by European and International organisations, for example World mental health day (WHO), European Mental Health week (MHE), the <a href="#">Endstress.eu campaign</a> promoted by Eurocadres and ETUC in order to maximise their dissemination.</p> <p>Besides these communication and dissemination initiatives, contributions summarizing the results of the research activities</p>	<p>FIM-CISL</p> <p>VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p>	<p>COO</p> <p>BEN</p> <p>AP</p> <p>AE</p>	

		<p>(namely, National Highlights - D2.1) will be written by BENs in national languages and disseminated through the ADAPT International Bulletin (2000 subscribers) and HIVA-KU Leuven newsletter (4000 subscribers). Contents in Spanish language will be also disseminated through the <a href="#">CIELO Laboral Newsletter</a> (2200 subscribers).</p> <p>In addition, a summary of each National Highlight will be sent by research BENs to the corresponding EU-OSHA <a href="#">National Focal point</a>. <b>2 special issues of the ADAPT International Bulletin and the CIELO Laboral Newsletter encompassing all the Highlights will be released in M12.</b></p> <p>The EU Interactive Guide will also be further disseminated 1) through its inclusion on the Social Europe website and newsletter in the form of an advertisement 2) during at least one session of the Metal Industry European Sectoral social dialogue committee thanks to the involvement of IAE.</p> <p>A short presentation video of the EU Interactive Guide (D2.2) will be produced by DCU and launched during the Final Conference. The video, whose contents will mainly be provided by FIM-CISL, will then be uploaded on <a href="#">COO</a> and <a href="#">Fond. ADAPT</a> Youtube channels, and disseminated through social media accounts of the project and of each partner. The video will be made in the English language and provided with subtitles in each target countries’ language (IT, ES, SK, SI, FR, TR, NL) in order to maximise its impact.</p>			
T4.4	Organisation & Delivery of IncreMe(n)tal Final Conference	<p>The Final Conference will be organized with the aim of disseminating the outcomes of the project among relevant stakeholders. The event, organised in the hybrid format, will take place in the EESC headquarters in Brussels to potentially maximize the multiplier effect of the event. The final conference will be the occasion to launch the final research output, i.e., the European-level Interactive Guide (D2.2) and its presentation video (see T4.3). Target audience of the final conference: 50 participants. Min. 1 people per BEN, AP and min. 2 COO representatives will participate in presence. The QAO will be also present: his travel and accommodation costs will be borne by COO. OZ KOVO travel expenses will be covered by CELSI.</p>	<p>FIM-CISL</p> <p>VZW, CELSI, DCU, Fond. ADAPT, HACETTEPE, KU LEUVEN, SIPTU, SKEI, TMS, UGT FICA, UL, USC</p> <p>OZ KOVO, IndustriAll Europe</p> <p>ADAPT</p> <p>QAO</p>	<p>COO</p> <p>BEN</p> <p>AP</p> <p>AE</p>	<p>YES (provision, free of charge, of a conference room at EESC’s headquarters in Brussels)</p>
<b>Milestones and deliverables (outputs/outcomes)</b>					

**Milestones** are control points in the project that help to chart progress. Use them only for major outputs in complicated projects. Otherwise leave the section on milestones empty.  
 Means of verification are how you intend to prove that a milestone has been reached. If appropriate, you can also refer to indicators.  
**Deliverables** are project outputs which are submitted to show project progress (any format). Refer only to major outputs. Do not include minor sub-items, internal working papers, meeting minutes, etc. Limit the number of deliverables to max 10-15 for the entire project. You may be asked to further reduce the number during grant preparation.  
 For deliverables such as meetings, events, seminars, trainings, workshops, webinars, conferences, etc., enter each deliverable separately and provide the following in the 'Description' field: invitation, agenda, signed presence list, target group, number of estimated participants, duration of the event, report of the event, training material package, presentations, evaluation report, feedback questionnaire.  
 For deliverables such as manuals, toolkits, guides, reports, leaflets, brochures, training materials etc., add in the 'Description' field: format (electronic or printed), language(s), approximate number of pages and estimated number of copies of publications (if any).  
 For each deliverable you will have to indicate a due month by when you commit to upload it in the Portal. The due month of the deliverable cannot be outside the duration of the work package and must be in line with the timeline provided below. Month 1 marks the start of the project and all deadlines should be related to this starting date.  
 The labels used mean:  
 Public — fully open (🚩 automatically posted online on the Project Results platforms)  
 Sensitive — limited under the conditions of the Grant Agreement  
 EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision [2015/444](#).

Milestone No (continuous numbering not linked to WP)	Milestone Name	Work Package No	Lead Beneficiary	Description		Due Date (month number)	Means of Verification
MS4	Final Conference	4	FIM-CISL	Final hybrid conference to be held in Brussels. target: max. 50 in presence participants. The event will be carried out in English with simultaneous interpretation available (ENG<->ES, ENG<->FR, ENG<->ITA) for attendees. The agenda of the final conference will be circulated on the project webpage and through social media, together with the recording and streaming of the event.		M24	Signed presence list and online attendance verification and recording of streamed event.
Deliverable No (continuous numbering linked to WP)	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month number)	Description (including format and language)
D4.1	Impact amplification plan: communication, stakeholder engagement and sustainability	4	FIM-CISL	R- Document	[SEN — Sensitive]	M3	PDF document (about 5 pages). Language: English

D4.2	Presentation video of the EU Interactive Guide	4	DCU	DEC - Video	[PU - Public]	M24	<p>Presentation video of the Interactive Guide (5 min max) to be launched during the Final Conference and later uploaded on <a href="#">COO</a> and <a href="#">Fond. ADAPT</a> Youtube channels, and disseminated through social media accounts of the project and of each partner.</p> <p>Language: English + subtitles in each target countries' language (IT, ES, SK, SI, FR, TR, NL)</p>
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Estimated budget — Resources														
Participant	Costs <i>(n/a for prefixed Lump Sum Grants)</i>													
	A. Personnel		B. Subcontracting	C.1 Travel			C.1 Accomodation	C.1 Subsistence	C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties		E. Indirect costs	Total costs
person months	€	n. travels		people travelling	€	grants					€			
FIM-CISL (COO)	2,2	€ 16.110,00	€ 0,00	1	3	€ 663,00	€ 137,00	€ 306,00	€ 0,00	€ 4.750,00	0	€ 0,00	€ 1.537,62	€ 23.503,62
Fondazione ADAPT	1,8	€ 5.480,00	€ 0,00	1	2	€ 418,00	€ 274,00	€ 306,00	€ 0,00	€ 1.952,00	0	€ 0,00	€ 590,10	€ 9.020,10
ADAPT_AE	0,9	€ 2.660,00	€ 0,00	1	1	€ 209,00	€ 137,00	€ 153,00	€ 0,00	€ 0,00	0	€ 0,00	€ 221,13	€ 3.380,13
USC	1,1	€ 5.310,00	€ 0,00	1	1	€ 230,00	€ 137,00	€ 153,00	€ 0,00	€ 0,00	0	€ 0,00	€ 408,10	€ 6.238,10
UGT-FICA	0,8	€ 3.370,00	€ 0,00	1	1	€ 230,00	€ 137,00	€ 153,00	€ 0,00	€ 0,00	0	€ 0,00	€ 272,30	€ 4.162,30

KU Leuven	1	€ 8.850,00	€ 0,00	1	2	€ 92,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 625,94	€ 9.567,94
VZW	0,7	€ 7.000,00	€ 0,00	0	0	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0	€ 0,00	€ 490,00	€ 7.490,00
UL	1	€ 4.620,00	€ 0,00	1	1	€ 221,00	€ 137,00	€ 153,00	€ 0,00	€ 0,00	0	€ 0,00	€ 359,17	€ 5.490,17
SKEI	0,7	€ 3.720,00	€ 0,00	1	1	€ 221,00	€ 137,00	€ 153,00	€ 0,00	€ 0,00	0	€ 0,00	€ 296,17	€ 4.527,17
HACETTEP E UNI	1	€ 3.200,00	€ 0,00	1	1	€ 433,00	€ 274,00	€ 204,00	€ 0,00	€ 0,00	0	€ 0,00	€ 287,77	€ 4.398,77
TMS	0,8	€ 1.980,00	€ 0,00	1	1	€ 433,00	€ 274,00	€ 204,00	€ 0,00	€ 0,00	0	€ 0,00	€ 202,37	€ 3.093,37
DCU	1,4	€ 10.480,00	€ 0,00	1	1	€ 201,00	€ 137,00	€ 153,00	€ 0,00	€ 800,00	0	€ 0,00	€ 823,97	€ 12.594,97
SIPTU	0,6	€ 2.510,00	€ 0,00	1	1	€ 201,00	€ 137,00	€ 153,00	€ 0,00	€ 0,00	0	€ 0,00	€ 210,07	€ 3.211,07
CELSI	1	€ 3.060,00	€ 0,00	1	2	€ 442,00	€ 274,00	€ 306,00	€ 0,00	€ 525,00	0	€ 0,00	€ 322,49	€ 4.929,49
<b>Total</b>	<b>15</b>	<b>€ 78.350,00</b>	<b>€ 0,00</b>	<b>13</b>	<b>18</b>	<b>€ 3.994,00</b>	<b>€ 2.192,00</b>	<b>€ 2.397,00</b>	<b>€ 0,00</b>	<b>€ 8.027,00</b>	<b>0</b>	<b>€ 0,00</b>	<b>€ 6.647,20</b>	<b>€ 101.607,20</b>

*Overview of Work Packages (n/a for Lump Sum Grants)*

**Staff effort per work package**

*Fill in the summary on work package information and effort per work package.*

Work Package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Start Month	End Month	Person-Months
-----------------	--------------------	---------------------	-----------------------------	-------------	-----------	---------------



1	Project coordination and monitoring, risk management and quality assurance	1	FIM-CISL	1	24	26
2	Research activities and preparation for training	2	FOND. ADAPT	2	24	30,20
3	Awareness raising and training activities	1	FIM-CISL	11	24	11,70
4	Communication , dissemination and follow-up activities	1	FIM-CISL	2	24	15
					Total Person- Months	82,90

**Staff effort per participant**

Fill in the effort per work package and Beneficiary/Affiliated Entity.

Please indicate the number of person/months over the whole duration of the planned work.

Identify the work-package leader for each work package by showing the relevant person/month figure in **bold**.

Participant	WP1	WP2	WP3	WP4	Total Person-Months
FIM-CISL (COO)	<b>4,5</b>	0,5	<b>1,0</b>	<b>2,2</b>	8,2
Fondazione ADAPT	2,3	<b>3,1</b>	0,8	1,8	8

ADAPT_AE	0,5	<b>1,5</b>	0,5	0,9	3,4
USC	2,0	3,5	0,7	1,1	7,3
UGT-FICA	1,9	0,7	0,9	0,8	4,3
KU Leuven	1,5	3,5	0,7	1,0	6,7
VZW	1,5	0,8	1,0	0,7	4
UL	1,5	4,0	0,7	1,0	7,2
SKEI	1,5	0,8	0,8	0,7	3,8
HACETTEPE UNI	2,0	3,4	0,8	1,0	7,2
TMS	1,8	0,7	1,2	0,8	4,5
DCU	1,7	3,2	0,7	1,4	7
SIPTU	1,6	0,5	1,1	0,6	3,8
CELSI	1,7	4,0	0,8	1,0	7,5
Total Person-Months	26,00	30,20	11,70	15,00	82,90

### 4.3 Timetable

#### Timetable (projects up to 2 years)

Fill in cells in beige to show the duration of activities. Repeat lines/columns as necessary.

**Note:** Use the project month numbers instead of calendar months. Month 1 marks always the start of the project. In the timeline you should indicate the timing of each activity per WP.

ACTIVITY	MONTHS																							
	M 1	M 2	M 3	M 4	M 5	M 6	M 7	M 8	M 9	M 10	M 11	M 12	M 13	M 14	M 15	M 16	M 17	M 18	M 19	M 20	M 21	M 22	M 23	M 24
Task 1.1 - Project coordination, including administrative, legal and financial management			D 1. 1																					
Task 1.2 - Kick-off meeting and project progress meetings		M S 1										M S 2												M S 3
Task 1.3 - Monitoring, quality assurance and risk assessment																								D 1. 2
Task 2.1 - Preparation of questionnaires and interviews outlines - identification of contacts included																								
Task 2.2 - Administration of questionnaires and interviews - data & info collection and analysis included																								
Task 2.3 - Desk research concerning mental health in the workplace																								
Task 2.4 - IncreMe(n)tal National Highlights - drafting and delivery																								D 2. 1
Task 2.5 – IncreMe(n)tal EU Interactive Guide - drafting & delivery																								D 2. 2



**Note:** Use actual, calendar years and quarters. In the timeline you should indicate the timing of each activity per WP. You may add additional columns if your project is longer than 6 years.

ACTIVITY	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5				YEAR 6			
	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4
Task 1.1 - ...																								
Task 1.2 - ...																								
Task ...																								

### 4.4 Subcontracting

**Subcontracting**

Give details on subcontracted project tasks (if any) and explain the reasons why (as opposed to direct implementation by the Beneficiaries/Affiliated Entities).  
 Subcontracting — Subcontracting means the implementation of ‘action tasks’, i.e. specific tasks which are part of the EU grant and are described in Annex 1 of the Grant Agreement.  
**Note:** Subcontracting concerns the outsourcing of a part of the project to a party outside the consortium. It is not simply about purchasing goods or services. We normally expect that the participants have sufficient operational capacity to implement the project activities themselves. Subcontracting should therefore be exceptional.  
 Include only subcontracts that comply with the rules (i.e. best value for money and no conflict of interest; no subcontracting of coordinator tasks).

Work Package No	Subcontract No (continuous numbering linked to WP)	Subcontract Name (subcontracted action tasks)	Description (including task number and BEN to which it is linked)	Estimated Costs (EUR)	Justification (why is subcontracting necessary?)	Best-Value-for-Money (how do you intend to ensure it?)
	S1.1					
	S1.2					

Other issues:  
 If subcontracting for the project goes beyond 30% of the total eligible costs, give specific reasons.

Insert text

## 5. OTHER

### 5.1 Ethics


<b>Ethics</b>
Not applicable

### 5.2 Security

<b>Security</b>
Not applicable

## 6. DECLARATIONS

<b>Higher funding rate</b> <i>(for SOCPL Support for social dialogue call)</i>	<b>YES/NO</b>
Do you fulfil the conditions set out in the Call document for a higher funding rate? If YES, explain and provide details.	<b>NO</b>

<b>Double funding</b>	
<b>Information concerning other EU grants for this project</b>	<b>YES/NO</b>
 Please note that there is a strict prohibition of double funding from the EU budget (except under EU Synergies actions).	
We confirm that to our best knowledge neither the project as a whole nor any parts of it have benefitted from any other EU grant (including EU funding managed by authorities in EU Member States or other funding bodies, e.g. Erasmus, EU Regional Funds, EU Agricultural Funds, European Investment Bank, etc). If NO, explain and provide details.	<b>YES</b>
We confirm that to our best knowledge neither the project as a whole nor any parts of it are (nor will be) submitted for any other EU grant (including EU funding managed by authorities in EU Member States or other funding bodies, e.g. Erasmus, EU Regional Funds, EU Agricultural Funds, European Investment Bank, etc). If NO, explain and provide details.	<b>YES</b>

<b>Financial support to third parties (if applicable)</b>
<i>If in your project the maximum amount per third party will be more than the threshold amount set in the Call document, justify and explain why the higher amount is necessary in order to fulfil your project's objectives.</i>
Insert text



## ANNEXES

### LIST OF ANNEXES

#### Standard

Detailed budget table/Calculator (annex 1 to Part B) — *mandatory for Lump Sum Grants (see [Portal Reference Documents](#))*

CVs (annex 2 to Part B) — *mandatory, if required in the Call document*

Annual activity reports (annex 3 to Part B) — *mandatory, if required in the Call document*

List of previous projects (annex 4 to Part B) — *mandatory, if required in the Call document*

#### Special

Other annexes (annex X to Part B) — *mandatory, if required in the Call document*



## LIST OF PREVIOUS PROJECTS

<b>List of previous projects</b>					
<i>Please provide a list of your previous projects for the last 3 years.</i>					
Participant	Project Reference No and Title, Funding programme	Period (start and end date)	Role (COO, BEN, AE, OTHER)	Amount (EUR)	Website (if any)
[name]					
[name]					

<b>HISTORY OF CHANGES</b>		
VERSION	PUBLICATION DATE	CHANGE
1.0	25.02.2021	Initial version (new MFF).

## ANNEX 2

## ESTIMATED BUDGET FOR THE ACTION

Forms of funding	Estimated eligible <sup>1</sup> costs (per budget category)											Estimated EU contribution <sup>2</sup>				
	Direct costs								Indirect costs			Total costs	EU contribution to eligible costs			Maximum grant amount <sup>6</sup>
	A. Personnel costs			B. Subcontracting costs	C. Purchase costs			D. Other cost categories	E. Indirect costs <sup>3</sup>	Funding rate % <sup>4</sup>	Maximum EU contribution <sup>5</sup>		Requested EU contribution			
	A.1 Employees (or equivalent)	A.4 SME owners and natural person beneficiaries	A.5 Volunteers	B. Subcontracting	C.1 Travel and subsistence			C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties	E. Indirect costs					
A.2 Natural persons under direct contract			Travel		Accommodation	Subsistence										
A.3 Seconded persons				Unit <sup>7</sup> or actual costs	Unit <sup>7</sup> or actual costs	Unit <sup>7</sup> or actual costs	Actual costs	Actual costs	Actual costs	Flat-rate costs <sup>8</sup>						
	a1	a3	a4	b	c1a	c1b	c1c	c2	c3	d1	e = flat-rate * (a1 + a3 + b + c1a + c1b + c1c + c2 + c3 + d1)	f = a + b + c + d + e	U	g = f * U%	h	m
1 - FIM CISL	62 170.00	0.00	0.00	0.00	3 403.00	835.00	988.00	2 800.00	15 765.00	0.00	6 017.27	91 978.27	90	82 780.44	82 780.00	82 780.00
2 - FOND_ADAPT	23 520.00	0.00	0.00	0.00	1 779.00	1 079.00	1 164.00	610.00	2 652.00	0.00	2 156.28	32 960.28	90	29 664.25	29 664.00	29 664.00
2.1 - ADAPT	8 800.00	0.00	0.00	0.00	836.00	479.00	594.00	0.00	0.00	0.00	749.63	11 458.63	90	10 312.77	10 312.00	10 312.00
3 - USC	36 610.00	0.00	0.00	0.00	1 742.00	951.00	790.00	0.00	3 475.00	0.00	3 049.76	46 617.76	90	41 955.98	41 955.00	41 955.00
4 - UGT FICA	17 930.00	0.00	0.00	0.00	4 285.00	1 887.00	1 494.00	0.00	1 350.00	0.00	1 886.22	28 832.22	90	25 949.00	25 949.00	25 949.00
5 - KU Leuven	57 030.00	0.00	0.00	0.00	1 114.00	463.00	417.00	0.00	3 370.00	0.00	4 367.58	66 761.58	90	60 085.42	60 085.00	60 085.00
6 - VZW	40 000.00	0.00	0.00	0.00	3 092.00	463.00	417.00	0.00	4 545.00	0.00	3 396.19	51 913.19	90	46 721.87	46 721.00	46 721.00
7 - UL	40 080.00	0.00	0.00	0.00	1 007.00	600.00	570.00	0.00	2 470.00	0.00	3 130.89	47 857.89	90	43 072.10	43 072.00	43 072.00
8 - SKEI	20 190.00	0.00	0.00	0.00	1 817.00	600.00	570.00	0.00	1 250.00	0.00	1 709.89	26 136.89	90	23 523.20	23 523.00	23 523.00
9 - HACETTEPE_UNI	22 650.00	0.00	0.00	0.00	1 299.00	736.00	576.00	0.00	2 245.00	0.00	1 925.42	29 431.42	90	26 488.28	26 488.00	26 488.00
10 - TMS	11 380.00	0.00	0.00	0.00	2 499.00	736.00	576.00	0.00	7 300.00	0.00	1 574.37	24 065.37	90	21 658.83	21 658.00	21 658.00
11 - DCU	52 600.00	0.00	0.00	0.00	1 150.00	600.00	570.00	0.00	1 795.00	0.00	3 970.05	60 685.05	90	54 616.55	54 616.00	54 616.00
12 - SIPTU	19 190.00	0.00	0.00	0.00	2 230.00	600.00	570.00	0.00	1 750.00	0.00	1 703.80	26 043.80	90	23 439.42	23 439.00	23 439.00
13 - CELSI	25 540.00	0.00	0.00	0.00	2 606.00	1 200.00	1 139.00	0.00	3 770.00	0.00	2 397.85	36 652.85	90	32 987.57	32 987.00	32 987.00
14 - KOVO																
15 - IAE																
# consortium	437 690.00	0.00	0.00	0.00	28 859.00	11 229.00	10 435.00	3 410.00	51 737.00	0.00	38 035.20	581 395.20		523 255.68	523 249.00	523 249.00

<sup>1</sup> See Article 6 for the eligibility conditions. All amounts must be expressed in EUR (see Article 21 for the conversion rules).

<sup>2</sup> The consortium remains free to decide on a different internal distribution of the EU funding (via the consortium agreement; see Article 7).

<sup>3</sup> Indirect costs already covered by an operating grant (received under any EU funding programme) are ineligible (see Article 6.3). Therefore, a beneficiary/affiliated entity that receives an operating grant during the action duration cannot declare indirect costs for the year(s)/reporting period(s) covered by the operating grant, unless they can demonstrate that the operating grant does not cover any costs of the action. This requires specific accounting tools. Please immediately contact us via the EU Funding & Tenders Portal for details.

<sup>4</sup> See Data Sheet for the funding rate(s).

<sup>5</sup> This is the theoretical amount of the EU contribution to costs, if the reimbursement rate is applied to all the budgeted costs. This theoretical amount is then capped by the 'maximum grant amount'.

<sup>6</sup> The 'maximum grant amount' is the maximum grant amount decided by the EU. It normally corresponds to the requested grant, but may be lower.

<sup>7</sup> See Annex 2a 'Additional information on the estimated budget' for the details (units, cost per unit).

<sup>8</sup> See Data Sheet for the flat-rate.

## **ANNEX 2a**

### **ADDITIONAL INFORMATION ON UNIT COSTS AND CONTRIBUTIONS**

#### **SME owners/natural person beneficiaries without salary**

See [\*Additional information on unit costs and contributions \(Annex 2a and 2b\)\*](#)

#### **Volunteers**

See [\*Additional information on unit costs and contributions \(Annex 2a and 2b\)\*](#)

#### **Travel and subsistence**

See [\*Additional information on unit costs and contributions \(Annex 2a and 2b\)\*](#)

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**FONDAZIONE ADAPT (FOND\_ADAPT)**, PIC 941351245, established in VIA GARIBALDI 7, BERGAMO 24122, Italy,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**UNIVERSIDAD DE SANTIAGO DE COMPOSTELA (USC)**, PIC 999829635, established in COLEXIO DE SAN XEROME PRAZA DO OBRADOIRO S/N, SANTIAGO DE COMPOSTELA 15782, Spain,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**FEDERACION DE INDUSTRIA, CONSTRUCCION Y AGRO DE LA UNION GENERAL DE TRABAJADORES (UGT FICA)**, PIC 890682422, established in AVENIDA DE AMERICA 25, MADRID 28002, Spain,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**KATHOLIEKE UNIVERSITEIT LEUVEN (KU Leuven)**, PIC 999991334, established in OUDE MARKT 13, LEUVEN 3000, Belgium,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**VORMINGSCENTRUM RECHT EN PLICHT (VZW)**, PIC 890581057, established in KONING BOUDEWIJNSTRAAT 18, GENT 9000, Belgium,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary



**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**UNIVERZA V LJUBLJANI (UL)**, PIC 999923240, established in KONGRESNI TRG 12, LJUBLJANA 1000, Slovenia,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**SINDIKAT KOVINSKE IN ELEKTROINDUSTRIJE SLOVENIJE (SKEI)**, PIC 885950471,  
established in DALMATINOVA 4, LJUBLJANA 1000, Slovenia,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL)**  
**and the European Union** ('EU'), represented by the European Commission ('European Commission'  
or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement,  
in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in  
accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**HACETTEPE UNIVERSITESI (HACETTEPE\_UNI)**, PIC 999900930, established in HACETTEPE UNIVERSITESI BEYTEPE KAMPUSU REKTORLUK BINASI, CANKAYA ANKARA 06800, Türkiye,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**TURK METAL SENDIKASI (TMS)**, PIC 944440501, established in BESTEPE MAHALLESİ 4 4 SOKAK NO 3 SOGOTOZU YENİLAHA, ANKARA 06510, Türkiye,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**DUBLIN CITY UNIVERSITY (DCU)**, PIC 999892588, established in Glasnevin, DUBLIN 9, Ireland,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**SERVICES, INDUSTRIAL, PROFESSIONAL AND TECHNICAL UNION (SIPTU)**, PIC 882028373, established in LIBERTY HALL EDEN QUAY, DUBLIN Dublin 1, Ireland,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL) and the European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement, in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

**ANNEX 3**

**ACCESSION FORM FOR BENEFICIARIES**

**STREDOEUROPSKY INSTITUTE PRE VYSKUM PRACE (CELSI)**, PIC 997562066,  
established in ZVOLENSKA ULICA 29, BRATISLAVA RUZINOV 821 09, Slovakia,

**hereby agrees**

**to become beneficiary**

**in Agreement No 101143366 — IncreMe-n-tal** ('the Agreement')

**between FEDERAZIONE ITALIANA METALMECCANICI-CISL ASSOCIAZIONE (FIM CISL)**  
**and the European Union** ('EU'), represented by the European Commission ('European Commission'  
or 'granting authority'),

**and mandates**

**the coordinator** to submit and sign in its name and on its behalf any **amendments** to the Agreement,  
in accordance with Article 39.

By signing this accession form, the beneficiary accepts the grant and agrees to implement it in  
accordance with the Agreement, with all the obligations and terms and conditions it sets out.

SIGNATURE

For the beneficiary

ANNEX 4 ESF and SOCPL MGA — MULTI + MONO

FINANCIAL STATEMENT FOR [PARTICIPANT NAME] FOR REPORTING PERIOD [NUMBER]

Eligible <sup>1</sup> costs (per budget category)												EU contribution <sup>2</sup>				Revenues	
Direct costs										Indirect costs	Total costs	EU contribution to eligible costs			Total requested EU contribution	Income generated by the action	
A. Personnel costs			B. Subcontracting costs	C. Purchase costs			D. Other cost categories	E. Indirect costs <sup>2</sup>	Funding rate % <sup>3</sup>	Maximum EU contribution <sup>4</sup>		Requested EU contribution					
A.1 Employees (or equivalent)	A.4 SME owners and natural person beneficiaries	A.5 Volunteers	B. Subcontracting	C.1 Travel and subsistence			C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties	E. Indirect costs	Total costs	Funding rate % <sup>3</sup>	Maximum EU contribution <sup>4</sup>	Requested EU contribution	Total requested EU contribution	Income generated by the action	
A.2 Natural persons under direct contract				Travel	Accommodation	Subsistence											
A.3 Seconded persons																	
Forms of funding	Actual costs	Unit costs <sup>5</sup>	Unit costs <sup>5</sup>	Actual costs	Unit <sup>5</sup> or actual costs	Unit <sup>5</sup> or actual costs	Unit <sup>5</sup> or actual costs	Actual costs	Actual costs	Actual costs	Flat-rate costs <sup>6</sup>						
	a1	a3	a4	b	c1a	c1b	c1c	c2	c3	d1a	e = flat-rate * (a1 + a3 + b + c1a + c1b + c1c + c2 + c3 + d1a)	f = a+b+c+d+e	U	g = f*U%	h	m	n
XX – [short name beneficiary/affiliated entity]																	

**The beneficiary/affiliated entity hereby confirms that:**  
 The information provided is complete, reliable and true.  
 The costs and contributions declared are eligible (see Article 6).  
 The costs and contributions can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations (see Articles 19, 20 and 25).  
 For the last reporting period: that all the revenues have been declared (see Article 22).

<sup>1</sup> Please declare all eligible costs and contributions, even if they exceed the amounts indicated in the estimated budget (see Annex 2). Only amounts that were declared in your individual financial statements can be taken into account later on, in order to replace costs/contributions that are found to be ineligible.

<sup>1</sup> See Article 6 for the eligibility conditions. All amounts must be expressed in EUR (see Article 21 for the conversion rules).

<sup>2</sup> If you have also received an EU operating grant during this reporting period, you cannot claim indirect costs - unless you can demonstrate that the operating grant does not cover any costs of the action. This requires specific accounting tools. Please contact us immediately via the Funding & Tenders Portal for details.

<sup>3</sup> See Data Sheet for the reimbursement rate(s).

<sup>4</sup> This is the *theoretical* amount of EU contribution to costs that the system calculates automatically (by multiplying the reimbursement rates by the costs declared). The amount you request (in the column 'requested EU contribution') may be less.

<sup>5</sup> See Annex 2a 'Additional information on the estimated budget' for the details (units, cost per unit).

<sup>6</sup> See Data Sheet for the flat-rate.



## ANNEX 5

### SPECIFIC RULES

#### INTELLECTUAL PROPERTY RIGHTS (IPR) — BACKGROUND AND RESULTS — ACCESS RIGHTS AND RIGHTS OF USE (— ARTICLE 16)

##### **Rights of use of the granting authority on results for information, communication, dissemination and publicity purposes**

The granting authority also has the right to exploit non-sensitive results of the action for information, communication, dissemination and publicity purposes, using any of the following modes:

- **use for its own purposes** (in particular, making them available to persons working for the granting authority or any other EU service (including institutions, bodies, offices, agencies, etc.) or EU Member State institution or body; copying or reproducing them in whole or in part, in unlimited numbers; and communication through press information services)
- **distribution to the public** in hard copies, in electronic or digital format, on the internet including social networks, as a downloadable or non-downloadable file
- **editing** or **redrafting** (including shortening, summarising, changing, correcting, cutting, inserting elements (e.g. meta-data, legends or other graphic, visual, audio or text elements extracting parts (e.g. audio or video files), dividing into parts or use in a compilation
- **translation** (including inserting subtitles/dubbing) in all official languages of EU
- **storage** in paper, electronic or other form
- **archiving** in line with applicable document-management rules
- the right to authorise **third parties** to act on its behalf or sub-license to third parties, including if there is licensed background, any of the rights or modes of exploitation set out in this provision
- **processing**, analysing, aggregating the results and **producing derivative works**
- **disseminating** the results in widely accessible databases or indexes (such as through ‘open access’ or ‘open data’ portals or similar repositories, whether free of charge or not.

The beneficiaries must ensure these rights of use for the whole duration they are protected by industrial or intellectual property rights.

If results are subject to moral rights or third party rights (including intellectual property rights or rights of natural persons on their image and voice), the beneficiaries must ensure that they comply with their obligations under this Agreement (in particular, by obtaining the necessary licences and authorisations from the rights holders concerned).

## **COMMUNICATION, DISSEMINATION AND VISIBILITY (— ARTICLE 17)**

### **Additional communication and dissemination activities**

The beneficiaries must engage in the following additional communication and dissemination activities:

- **present the project** (including project summary, coordinator contact details, list of participants, European flag and funding statement and project results) on the beneficiaries' **websites** or **social media accounts**
- for actions involving **publications**, mention the action and the European flag and funding statement on the cover or the first pages following the editor's mention
- upload the public **project results** to the ESF+ Project Results platform, available through the Funding & Tenders Portal.

## **SPECIFIC RULES FOR CARRYING OUT THE ACTION (— ARTICLE 18)**

### **Specific rules for ESF+ actions**

When implementing ESF+ actions, the beneficiaries must take into account and promote equality between men and women, gender mainstreaming and the integration of gender perspective, as well as accessibility for persons with disabilities and must prevent any discrimination based on gender, racial or ethnic origin, religion or belief, disability, age or sexual orientation.

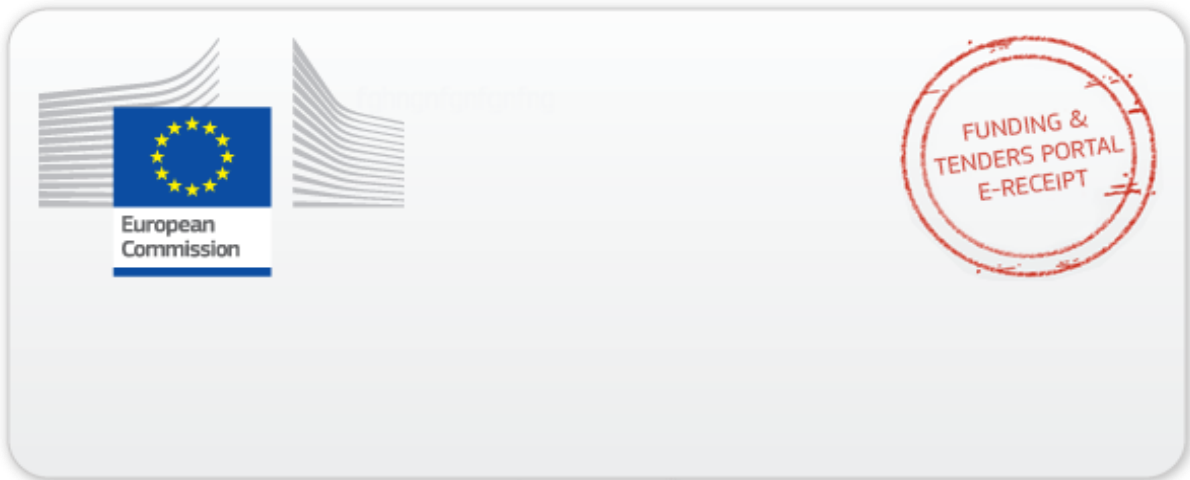
### **Specific rules for financial support to third parties**

When implementing financial support to third parties in EURES targeted mobility schemes, the beneficiaries must respect the following conditions:

- avoid any conflict of interest and comply with the principles of transparency, non-discrimination and sound financial management
  - for the types of activity and categories of persons that will be supported:
    - support candidates applying for a job, traineeship or apprenticeship in another EU or EEA country, as specified in the call conditions, through
      - an allowance for their job interviews covering travel, insurance and subsistence costs
- and, if successful,
- a relocation allowance to move to the other EU country, including allowance for family members (spouse and dependent children)
  - other financial support to cope with legal and practical expenditure resulting from the move to the other country, notably for language courses and the recognition of diplomas and qualifications, and for people with special needs or trainees and apprentices with low income who may benefit from a subsistence allowance

Candidates must be at least 18 years and either EU or EEA country nationals (or third country nationals with long-term resident status in the EU and eligible to participate in EURES mobility schemes under Directive 2003/109).

- support small- and medium-sized enterprises (SMEs) for an integration programme, as specified in the call conditions, notably through support to induction trainings
- other conditions:
  - the overall amount allocated to this type of support must not exceed EUR 30 000 per recipient.



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