

EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR EMPLOYMENT, SOCIAL AFFAIRS AND INCLUSION
Social Affairs
Social Investment Strategy

GRANT AGREEMENT FOR AN ACTION WITH MULTIPLE BENEFICIARIES

AGREEMENT NUMBER — VS/2018/0415

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

of the one part,

The European Union ('the Union'), represented by the European Commission ('the Commission'), represented for the purposes of signature of the Agreement by Jiri SVARC, Head of Unit, Social Investment Strategy,

and

of the other part,

1. 'the coordinator'

AGENZIA NAZIONALE PER LE POLITICHE ATTIVE DEL LAVORO (ANPAL)

VIA FORNOVO N 8, 00192 ROMA, ITALY,

represented for the purposes of signature of the Agreement by Maurizio DEL CONTE, President

and the following other beneficiaries:

2. UNIONE ITALIANA DEL LAVORO UIL (ITALY)
3. FONDAZIONE GIACOMO BRODOLINI (ITALY)
4. GRUPPO COOPERATIVO CGM CONSORZIO NAZIONALE DELLA COOPERAZIONE SOCIALE GINO MATTARELLI SOCIETA COOPERATIVA SOCIALE (ITALY)
5. REFORM - RESSURSSENTER FOR MENN STIFTELSE (NORWAY)
6. INSTITUTO DE LA MUJER Y PARA LA IGUALDAD DE OPORTUNIDADES (SPAIN)
7. THE WORKLIFE HUB (BELGIUM)

duly represented for the signature of the Agreement by the coordinator by virtue of the mandate(s) included in Annex IV.

Unless otherwise specified, references to 'beneficiary' and 'beneficiaries' include the coordinator.

The parties referred to above

HAVE AGREED

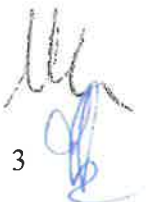
to the Special Conditions ('the Special Conditions') and the following Annexes:

- Annex I Description of the action
- Annex II General Conditions ('the General Conditions')
- Annex III Estimated budget of the action
- Annex IV Mandate(s) provided to the coordinator by the other beneficiary(ies)
- Annex V Model technical report
- Annex VI Model financial statement: not applicable
- Annex VII Model terms of reference for the certificate on the financial statements: not applicable
- Annex VIII Model terms of reference for the certificate on the compliance of the cost accounting practices: not applicable

which form an integral part of the Agreement.

The provisions in the Special Conditions of the Agreement take precedence over its Annexes.

The provisions in Annex II 'General Conditions' take precedence over the other Annexes.

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SPECIAL CONDITIONS

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ARTICLE I.1 — SUBJECT MATTER OF THE AGREEMENT

The Commission has decided to award a grant under the terms and conditions set out in the Special Conditions, the General Conditions and the other Annexes to the Agreement, for the *action* entitled **EQW&L-Equality for work and Life**, as described in Annex I.

By signing the Agreement, the beneficiaries accept the grant and agree to implement the *action*, acting on their own responsibility.

ARTICLE I.2 — ENTRY INTO FORCE AND IMPLEMENTATION PERIOD OF THE AGREEMENT

I.2.1 The Agreement enters into force on the date on which the last party signs it.

I.2.2 The *action* runs for 24 months starting on 1 December 2018.

ARTICLE I.3 — MAXIMUM AMOUNT AND FORM OF THE GRANT

I.3.1 The *maximum amount of the grant* is EUR 862 014.73.

I.3.2 The grant takes the form of:

- (a) the reimbursement of 80% of the eligible costs of the *action* ('reimbursement of eligible costs'), which are estimated at EUR 1 077 556.73 and which are:
 - (i) actually incurred ('reimbursement of actual costs') for the direct costs of the beneficiaries
 - (ii) reimbursement of unit costs: not applicable
 - (iii) reimbursement of lump sum costs: not applicable
 - (iv) declared on the basis of a flat rate of 7% of the eligible direct costs ('reimbursement of flat-rate costs') for the indirect costs of the beneficiaries
 - (v) reimbursement of costs declared on the basis of the beneficiaries' usual cost accounting practices: not applicable
- (b) unit contribution: not applicable
- (c) lump sum contribution: not applicable
- (d) flat-rate contribution: not applicable

ARTICLE I.4 — REPORTING — REQUESTS FOR PAYMENT AND SUPPORTING DOCUMENTS

I.4.1 Reporting periods

The *action* is divided into the following *reporting periods*:

- Reporting period 1: from month 1 to month 12

- Reporting period 2: from month 13 to month 24

I.4.2 Request for second pre-financing payment and supporting documents

The coordinator must submit a request for the second pre-financing payment within 60 calendar days following the end of the first reporting period.

The request must be accompanied by the following documents:

- (a) a progress report on the implementation of the *action* ('technical report on progress');
- (b) a statement on the amount of the previous pre-financing instalment used to cover costs of the *action* ('statement on the use of the previous pre-financing instalment').

I.4.3 Requests for interim payments and supporting documents

Not applicable.

I.4.4 Request for payment of the balance and supporting documents

The coordinator must submit a request for payment of the balance within 60 calendar days following the end of the last reporting period.

This request must be accompanied by the following documents:

- (a) a final report on implementation of the *action* ('final technical report'), drawn up in accordance with Annex V, containing:
 - (i) the information needed to justify the eligible costs declared or the contribution requested on the basis of unit costs and lump sums (where the grant takes the form of the reimbursement of unit or lump sum costs or of a unit or lump sum contribution, as provided for in Article I.3.2(a)(ii) and (iii), (b) or (c));
 - (ii) information on subcontracting as referred to in Article II.11.1(d);
- (b) a final financial statement ('final financial statement'). The final financial statement must include a consolidated statement and a breakdown of the amounts claimed by each beneficiary and its affiliated entities.

The final financial statement must be drawn up in accordance with the structure of the estimated budget set out in Annex III and detail the amounts for each of the forms of grant set out in Article I.3.2 for the last reporting period;

- (c) a summary financial statement ('summary financial statement').

This statement must include a consolidated financial statement and a breakdown of the amounts declared or requested by each beneficiary and its affiliated entities, aggregating the financial statements already submitted previously and indicating the receipts referred to in Article II.25.3 for each beneficiary and its affiliated entities;

- (d) a certificate on the financial statements and underlying accounts ('certificate on the financial statements') for each beneficiary and for each affiliated entity, if:

- (i) the cumulative amount of payments the beneficiary requests as reimbursement of actual costs as referred to in Article I.3.2(a)(i) (and for which no certificate has yet been submitted) is EUR 325 000 or more;
- (ii) the maximum grant amount indicated for that beneficiary and its affiliated entities in the estimated budget as reimbursement of actual costs is EUR 750 000 or more.

This certificate must be produced by an approved auditor or, in the case of public bodies, by a competent and independent public officer and drawn up in accordance with Annex VII.

The certificate must certify that the costs declared in the final financial statement by the beneficiary concerned or its affiliated entities for the categories of costs reimbursed in accordance with Article I.3.2(a)(i) are real, accurately recorded and eligible in accordance with the Agreement.

In addition, the certificate must certify that all the receipts referred to in Article II.25.3 have been declared.

The coordinator must certify that the information provided in the request for payment of the balance is full, reliable and true.

The coordinator must also certify that the costs incurred can be considered eligible in accordance with the Agreement and that the request for payment is substantiated by adequate supporting documents that can be produced in the context of the checks or audits described in Article II.27.

In addition, the coordinator must certify that all the receipts referred to in Article II.25.3 have been declared.

I.4.5 Information on cumulative expenditure incurred

Not applicable.

I.4.6 Currency for requests for payment and financial statements and conversion into euros

Requests for payment and financial statements must be drafted in euros.

Beneficiaries and affiliated entities with general accounts in a currency other than the euro must convert costs incurred in another currency into euros at the average of the daily exchange rates published in the C series of the *Official Journal of the European Union*, determined over the corresponding reporting period (available at <http://www.ecb.europa.eu/stats/exchange/eurofxref/html/index.en.html>).

If no daily euro exchange rate is published in the *Official Journal of the European Union* for the currency in question, conversion must be made at the average of the monthly accounting rates established by the Commission and published on its website (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm), determined over the corresponding reporting period.



Beneficiaries and affiliated entities with general accounts in euros must convert costs incurred in another currency into euros in accordance with their usual accounting practices.

I.4.7 Language of requests for payments, technical reports and financial statements

All requests for payments, technical reports and financial statements must be submitted in English.

ARTICLE I.5 — PAYMENTS AND PAYMENT ARRANGEMENTS

I.5.1 Payments to be made

The Commission must make the following payments to the coordinator:

- a first pre-financing payment;
- a second pre-financing payment, on the basis of the request for the second pre-financing payment referred to in Article I.4.2;
- one payment of the balance, on the basis of the request for payment of the balance referred to in Article I.4.4.

I.5.2 Pre-financing payments

The aim of the pre-financing is to provide the beneficiaries with a float. The pre-financing remains the property of the Union until it is cleared against interim payments or, if it is not cleared against interim payments, until the payment of the balance.

The Commission must make a first pre-financing payment of EUR 344 805.89 to the coordinator within 30 calendar days from the entry into force of the Agreement, except if Article II.24.1 applies.

The Commission must make a second pre-financing payment of EUR 344 805.89 to the coordinator within 60 calendar days from when the Commission receives the request for second pre-financing payment referred to in Article I.4.2, except if Article II.24.1 or II.24.2 apply.

If the statement on the use of the previous pre-financing instalment submitted in accordance with Article I.4.2 shows that less than 70% of the previous pre-financing instalment paid has been used to cover costs of the *action*, the amount of the new pre-financing to be paid must be reduced by the difference between the 70% ceiling and the amount used.

I.5.3 Interim payments

Not applicable.

I.5.4 Payment of the balance

The payment of the balance reimburses or covers the remaining part of the eligible costs incurred by the beneficiaries for the implementation of the *action*.

If the total amount of earlier payments is greater than the final amount of the grant determined in accordance with Article II.25, the payment of the balance takes the form of a recovery as provided for by Article II.26.

If the total amount of earlier payments is lower than the final amount of the grant determined in accordance with Article II.25, the Commission must pay the balance within 90 calendar days from when it receives the documents referred to in Article I.4.4, except if Articles II.24.1 or II.24.2 apply.

Payment is subject to the approval of the request for payment of the balance and of the accompanying documents. Their approval does not imply recognition of the compliance, authenticity, completeness or correctness of their content.

The Commission determines the amount due as the balance by deducting the total amount of pre-financing and interim payments (if any) already made from the final amount of the grant determined in accordance with Article II.25.

The amount to be paid may, however, be offset, without the beneficiary's consent, against any other amount owed by the beneficiary to the Commission or to an executive agency (under the EU or Euratom budget), up to the maximum contribution indicated for that beneficiary, in the estimated budget in Annex III.

I.5.5 Notification of amounts due

The Commission must send a *formal notification* to the coordinator:

- (a) informing it of the amount due; and
- (b) specifying whether the notification concerns a further pre-financing payment, an interim payment or the payment of the balance.

For the payment of the balance, the Commission must also specify the final amount of the grant determined in accordance with Article II.25.

I.5.6 Interest on late payment

If the Commission does not pay within the time limits for payment, the beneficiaries are entitled to late-payment interest at the rate applied by the European Central Bank for its main refinancing operations in euros ('the reference rate'), plus three and a half points. The reference rate is the rate in force on the first day of the month in which the time limit for payment expires, as published in the C series of the *Official Journal of the European Union*.

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

If the Commission suspends the time limit for payment as provided for in Article II.24.2 or if it suspends an actual payment as provided for in Article II.24.1, these actions may not be considered as cases of late payment.

Late-payment interest covers the period running from the day following the due date for payment, up to and including the date of actual payment as established in Article I.5.8. The

Commission does not consider payable interest when determining the final amount of the grant within the meaning of Article II.25.

As an exception to the first subparagraph, if the calculated interest is lower than or equal to EUR 200, it must be paid to the coordinator only if the coordinator requests it within two months of receiving late payment.

I.5.7 Currency for payments

The Commission must make payments in euros.

I.5.8 Date of payment

Payments by the Commission are considered to have been carried out on the date when they are debited to its account.

I.5.9 Costs of payment transfers

Costs of the payment transfers are borne as follows:

- (a) the Commission bears the costs of transfer charged by its bank;
- (b) the beneficiary bears the costs of transfer charged by its bank;
- (c) the party causing a repetition of a transfer bears all costs of repeated transfers.

I.5.10 Payments to the coordinator

The Commission must make payments to the coordinator.

Payments to the coordinator discharge the Commission from its payment obligation.

ARTICLE I.6 — BANK ACCOUNT FOR PAYMENTS

All payments must be made to the coordinator's bank account as indicated below:

Name of bank: BANCA D'ITALIA

Account name: MIN ECONOMIA FINANZE FONDO ROTAZIONATTUAZIONE
POLITICHE COMUNITARIE

IBAN code: IT07E0100003245350200023211

ARTICLE I.7 — DATA CONTROLLER, COMMUNICATION DETAILS OF THE PARTIES

I.7.1 Data controller

The entity acting as a data controller as provided for in Article II.7 is the Head of Unit of DG Employment, Social Affairs and Inclusion — Employment, Programme Management and Implementation.

I.7.2 Communication details of the Commission

Any communication addressed to the Commission must be sent to the following address:

European Commission
DG Employment, Social Affairs and Inclusion
CAD - J27
B-1049 Brussels, Belgium
Email address: empl-vp-2018-005@ec.europa.eu

I.7.3 Communication details of the beneficiaries

Any communication from the Commission to the beneficiaries must be sent to the following address:

Mr Maurizio DEL CONTE, President

AGENZIA NAZIONALE PER LE POLITICHE ATTIVE DEL LAVORO

VIA FORNOVO N 8

00192 ROMA

ITALY
Email address: presidenza@anpal.gov.it

ARTICLE I.8 — ENTITIES AFFILIATED TO THE BENEFICIARIES

Not applicable.

ARTICLE I.9 — ADDITIONAL PROVISIONS ON USE OF THE RESULTS (INCLUDING INTELLECTUAL AND INDUSTRIAL PROPERTY RIGHTS)

In accordance with Article II.9.3, whereby the Union acquires rights to use the results of the *action*, these results may be exploited using any of the following modes:

- (a) 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;
- (b) communication through press information services;
- (c) inclusion in widely accessible databases or indexes, such as via 'open access' or 'open data' portals, or similar repositories, whether freely accessible or accessible only upon subscription;
- (d) edit or re-write the results of the *action*, including shortening, summarising, modifying the content, correcting technical errors in the content;
- (e) cut, insert meta-data, legends or other graphics, visual, audio or word elements in the results of the *action*;
- (f) extract a part (e.g. audio or video files) of, divide into parts or compile the results of the *action*;
- (g) prepare derivative works of the results of the *action*;
- (h) translate, insert subtitles in, dub the results of the *action* in languages used within the EU or languages of candidate countries;

- (i) license or sub-license to third parties, including if there are licensed pre-existing rights, any of the rights or modes of exploitation set out Article II.9.3 of the General Conditions and in the points above.

The beneficiaries must ensure that the Union has the rights of use specified in the General Conditions and in the points above for the whole duration of the industrial or intellectual property rights concerned.

ARTICLE I.10 — OBLIGATION TO CONCLUDE AN INTERNAL COOPERATION AGREEMENT

The beneficiaries must conclude an internal cooperation agreement including provisions on the management, operation and coordination of the beneficiaries and the implementation of the *action*.

ARTICLE I.11 — SPECIAL PROVISIONS ON THE FINANCIAL RESPONSIBILITY FOR RECOVERIES

The financial responsibility of each beneficiary is limited to its own debt, including any amount unduly paid by the Commission as a contribution towards the costs incurred by its affiliated entities.

Point (c) of the third paragraph of Article II.26.3 does not apply.

ARTICLE I.12 — SETTLEMENT OF DISPUTES WITH NON-EU BENEFICIARIES

This provision applies where a beneficiary is legally established in a country other than a Member State of the European Union (the 'non-EU beneficiary').

As an exception to Article II.18.2, any of the parties (the Commission or the non-EU beneficiary) may bring before the Belgian Courts any dispute between them concerning the interpretation, application or validity of the Agreement, if such dispute cannot be settled amicably.

Where one party has brought proceedings before the Belgian Courts, the other party may not bring a claim arising from the interpretation, application or validity of the Agreement in any other court than the Belgian Courts before which the proceedings have already been brought.

ARTICLE I.13 — BENEFICIARIES WHICH ARE INTERNATIONAL ORGANISATIONS

Not applicable.

ARTICLE I.14 — OTHER SPECIAL CONDITIONS

Not applicable.



SIGNATURES

For the coordinator

Maurizio DEL CONTE,
President

Signature Maurizio Del Conte

Done at Rome

on 6.12.2018 (date)

For the Commission

Jiri SVARC,
Head of Unit

Signature Jiri Svarc

Done at Brussels

on 13/12/2018 (date)

CALL FOR PROPOSALS INNOVATIVE WORK LIFE BALANCE STRATEGIES TO FACILITATE RECONCILIATION
OF PROFESSIONAL AND CARING RESPONSIBILITIES VP/2018/005

PROJECT TITLE: EQW&L: EQUALITY FOR WORK AND LIFE
APPLICATION REF: VP/2018/005/0114

Description of the action and workplan

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In coherence with the objectives of the present call, the EQ&WL project aims to elaborate and test a set of strategies, a new model of intervention and a toolkit to **facilitate the access to labour market of unemployed persons** – women but not only women - who are hindered from a getting a job by their reconciliation needs and to **support SMEs** – and namely those in the social economy – in their process of **getting awareness of the potentialities of working environments work-life balance friendly**.

In line with the objectives of the call, the focus of the proposal is contemporaneously *on the system* – proposing and testing strategies the Italian PES network can use to support persons entering the labour market not to be marginalised due to their work-life balance needs – *on the individuals* – unemployed persons and/or persons looking for a new job and accessing PES network services, to whom the new EQ&WL services will offer the opportunity to recognise/address own specific work life balance needs – and *on companies* - and namely on SMEs in the social economy sector, which are known to offer relevant employment opportunities for women – and often low skilled women - but at the same face more difficulties and constraints than bigger companies or corporations in implementing internal work life balance policies.

In the framework of the proposal, and in coherence with the call, the Consortium understands **work-life balance in an extended way**: not exclusively “women –centred” and focusing on encouraging men participation in care duties as well as on aspects of personal life not necessary related to caring of dependent persons (eg: taking care of personal well-being, sports, hobby, others). EQ&WL will specifically address **gender stereotypes and unconscious gender bias** and define, thanks to the transnational support of REFORM and IWE0 (who coordinates in Spain a network involving over 120 companies implementing work-life balance strategies) a **business case for SMEs** investing in gender-balanced work-life balance policies, showing how these policies can benefit both workers and employees.

The **scientific approach** requested by the call for the piloting phase will be implement via a detailed testing and monitoring plan, including control groups, as described in point 4 and tested by Fondazione Giacomo Brodolini (FGB) in previous social experimentation actions.

The **innovative aspect** of the proposal stands in the following elements:

- the aim to define strategies and collaborations schemes focusing on Work Life Balance, gathering multi- stakeholders partnerships (PES, SMEs and social partners) and promoting a non-stereotyped approach to Work life balance
- the aim to define and test concrete tools t supporting Work Life Balance and incorporating some of the most significant experiences at European level (see IWE0 and REFORM contributions to the project)
- the focus on PES in one of the European countries in which the under representation of women in the labour market is more evident, offering a set of strategies and a toolkit addressing Work Life Balance needs suitable to enhance both the quality and the quantity of jobs PES can provide access to.
- the simultaneous focus on SMEs, and mainly small companies in social economy, which at the same time represent the economic group whom potentially offers more opportunities for women with the strongest difficulty in implementing Work Life Balance policies
- the high scalability of the results which may results in the adoption of the EQ&WL strategies and toolkit but the national network of PES

- the consistent European dissemination strategy - see point 3.1.6 conceived to share the results of the project with a wide audience via the EU social partners

Finally, the composition of the Consortium, as a multi-level European partnership suitable to implement the activities and to ensure the sustainability of the action, answering to the call specific request and constitutes a point of strength of the proposal. Promoted by the Italian National public body responsible for PES (ANPAL – applicant) with a support of a selection of Italian Regions (Campania, Piemonte, and Toscana) and one Autonomous Province (Provincia Autonoma di Trento) directly responsible for managing employment services, EQ&WL involves an umbrella association of SMEs in the social economy field (CGM) as well as social partners European and national and level (ETUC, CEEP, UIL, CGIL, CISL) and a transnational partnership including public bodies (the Spanish Institute for Women, the Italian department of Equal Opportunities) and private organisations (the WLB HUB consultancy company, REFORM, the association of Norwegian Fathers promoting gender Equality). The presence of Giacomo Brodolini Foundation, a research centre with sound scientific background and over 20 years of experiences in implementing studies and transnational projects in the field of employment, gender equality and anti-discrimination strategies, grants the possibility to apply a rigorous scientific approach in designing and implementing testing activity.

2 What is the diagnosis of the issues addressed in the proposal and the approach suggested to address these issues

2.1 Women under-representation in the labour market and the role of Public Employment Policies

For a long time, increasing women's participation in the labour market has been an ambitious and strategic goal for the EU. Both the European Employment Strategy (EES) and the Lisbon Strategy promoted a distinct focus on modernising the European social model by setting targets for women's labour market participation. At the European Council meeting in Lisbon in 2000, a new methodological approach for reforming the social model was presented. The new approach, called 'open co-ordination', was based on common objectives reached by planning, national initiatives, and comparison of Member States.

In the Europe 2020 Strategy women's participation is not explicitly mentioned among the headline targets, but as the labour market participation of women is still notably lower than for men, the gender dimension remains a key issue to achieve the target employment rate of 75% among the population of 20-64 year olds. Labour market statistics show that in 2015, the EU28 employment rate for men (aged 20-64 years) was 75%, while it reached only 63.5% for women. The Ageing Report¹ forecasts that, without additional measures, the employment rate of women is projected to rise to only 67.3% in 2023 and 71.2% in 2060, while during the same time frame, the total employment rate (including both women and men) will reach 72.2% and 75.1% respectively.

In 2016 all Member States, employment rates of women² were lower than those of men, albeit with big variations across the EU. In 2016, the widest gender gap in the employment rate was recorded for Malta (27.7 p.p.) followed by Italy (20.1 p.p.) and Greece (19.0 p.p.), while the smallest gap was found in Lithuania (1.9 p.p.), followed by Latvia (2.9 p.p.) and then Finland (3.3 p.p.) The situation two years before in 2014 was similar either for the gender difference in levels of employment rates (the male employment rate stood at 74.5% and the female employment rate was 64.3%) or for the magnitude of the gap in employment rates (the EU-28 average gender gap in the employment rate

¹ Available at: http://ec.europa.eu/economy_finance/publications/european_economy/2014/pdf/ees_en.pdf

² Statistics for employment refer to the age group 20-64 years.

stood at 11.6 p.p. and again Malta with 28.4 p.p. had the largest gap followed by Italy and Greece, while Finland with 1.9 p.p. presented the smallest gender gap followed by Lithuania and Latvia.

When, however, the rates are calculated in full-time equivalents (FTE), even in countries where female employment rates are high and the magnitude of the gender gap is small, the overall picture changes. The FTE rate measures employed persons in a way that makes them comparable, even though they may work a different number of hours per week. This accounts for the difference between full time and part-time workers³. The most recent available data on FTE refer to 2016⁴ and show an EU-28 average gender employment gap of 18.2 p.p. It is Malta that still has the highest gender gap (32.6 p.p.) followed by the Netherlands (27.2 p.p.), Italy (24.8 p.p.), Germany (21.0 p.p.), and the United Kingdom (20.4 p.p.). The lowest gender gaps in FTE are found in Lithuania (2.7 p.p.), Latvia (4.1 p.p.) Finland (5.2), and Bulgaria (8.1 p.p.).

In other words, even in some countries where female employment rates are high overall, there may be a high degree of gender segregation by working time arrangements. Indeed, in all EU countries, women's share of part-time employment is higher than men's and, in the Netherlands, the proportion of women working part-time stands at 75 per cent⁵. It has been demonstrated that the gender gap in employment, in turn, results in an income gap between men and women⁶.

As reported by the European Commission,⁷ women's employment is tightly linked to the distribution of work and family responsibilities between women and men within the household. The European Commission stresses⁸ that there is strong evidence that after having children many women either drop out of the labour market altogether or work fewer hours in paid employment while spending more time in unpaid care and domestic responsibilities. Men, on the other hand, tend to work more in paid positions.

Part-time work in the EU is a common working time arrangement for women who have responsibilities for childcare or for the care of other dependents, even though many would prefer to work full-time. In general, part-time jobs tend to offer workers low wage rates, less training and restricted opportunities for advancement. Many women opt to work in part-time jobs which are not commensurate with their level of qualification (so-called 'downgrading') after having children and then find it difficult to regain their previous status. This is partly a result of the limited opportunities available for 'quality' part-time work. For example, analysis of the 2009 European Company Survey indicated that only about a quarter of companies (26%) had any part-time staff in highly qualified or managerial positions and these tended to be more often found in health, social work and in education, typically 'feminised' sectors⁹.

A previous study, examining the impact of work-life policies across the EU on women's employment patterns, found that access to part-time employment has been important in raising the labour force participation of mothers in many European countries¹⁰. That said, in those countries which have broader, more extensive packages of work-life balance supports, there is no longer a strong link

³ The unit is obtained by comparing an employee's average number of hours worked to the average number of hours of a full-time worker. A full-time person is therefore counted as one FTE, while a part-time worker / student gets a score in proportion to the hours he or she works. For example, a part-time worker employed for 20 hours a week where full-time work consists of 40 hours, is counted as 0.5 FTE.

⁴ European Commission (2015), Report on Equality between Women and Men 2015. See p. 49. Report available at: http://ec.europa.eu/justice/gender-equality/files/annual_reports/160422_annual_report_en.pdf

⁵ <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

⁶ Cuberes D., Teignier M. (2014), Aggregate Costs of Gender Gaps in the Labor Market: A Quantitative Estimate, available at http://www.marcreignier.com/research_files/GGLMAP_CT.pdf

⁷ Available at: http://ec.europa.eu/smart-regulation/roadmaps/docs/2015_just_012_new_initiative_replacing_maternity_leave_directive_en.pdf

⁸ Available at: http://ec.europa.eu/smart-regulation/roadmaps/docs/2015_just_012_new_initiative_replacing_maternity_leave_directive_en.pdf

⁹ European Foundation. (2011). *Part-time work in Europe. European Company Survey 2009*. <http://www.eurofound.europa.eu/pubdocs/2010/36/en/0/EF1036EN.pdf>

¹⁰ Hegewisch, A., & Gornick, J. C. (2011). The impact of work-family policies on women's employment: A review of research from OECD countries. *Community, Work and Family*, 14(2), 119–138.

between motherhood and working part-time (e.g., Sweden and Denmark). This is largely a result of widespread childcare services and access to full-time jobs with reasonable hours for both men and women, combined with social insurance regulations favouring full-time work¹¹. In other words, women are well aware of the disadvantages of part-time work and where possible, choose to work full-time if other work-life measures are in place. There are, however, countries (Finland for instance) where gender segregation plays an important role in protecting women's employment as women tend to work more in particular and highly feminised sectors¹².

Long-term disengagement from the labour market, low quality low paid part-time work, and high numbers of women on temporary contracts¹³, mean that many women face a relatively high risk of being in poverty, representing a waste of resources for the EU economy: a sub-optimal allocation of skills and competences at an aggregate level. The low participation of women in employment overall, and the low presence of women in good quality employment with high returns to themselves, to their families and to the whole European society, is worrying. Longer-term outcomes include poor pension provision and poorer quality of life in older age for women and for the whole of European society. Low fertility rates (often resulting from difficulties in balancing work and family commitments for those working long-hours in full-time work), coupled with long life expectancy in EU Member States, may undermine the demographic equilibrium between older and younger generations, with a concomitant impact on social protection systems.

In order to increase women's employment, the long-standing debate among scholars has identified some broad policy directions to be followed in the EU context¹⁴. These actions are also mentioned in a specific European Semester Thematic Fiche of the European Commission¹⁵. The actions are:

- creation of an appropriate legal framework for work-life balance, such as well-designed and accessible leave arrangements that can be equitably shared between parents, affordable and high-quality childcare, and long-term care. Evaluating and meeting the demand for full-time childcare places for children (aged 0-3 years and 3-compulsory school age) by enhancing the provision of ECEC (Early Childhood Education and Care) facilities;
- provision of flexible working arrangements to women and men in order to facilitate full-time working by those with care responsibilities; providing lower working-hours and the possibility for transition periods for those with care/other responsibilities; in the longer term, facilitate the transition from part-time to full-time jobs and take into account the possible impact on future pensions of those working part-time¹⁶;

¹¹ Rasmussen, E., Lind, J., & Visser, J. (2005). Divergence in part-time work in New Zealand, The Netherlands and Denmark. *British Journal of Industrial Relations*, 42, 637–658.

¹² Bettio F. and Verashchagina A. (2009), Gender Segregation in the Labour Market, European Commission. Available at: ec.europa.eu/social/BlobServlet?docId=4028

¹³ Across the EU-28, women are more likely to work with temporary contracts, leading to lower job and income security.

¹⁴ Recent literature includes the following. Bettio F., Plantenga J. and Smith M. (2013) *Gender and the European Labour Market*, Routledge. Nieuwenhuis R., Need A. and Van Der Kolk H. (2012) 'Institutional and Demographic Explanations of Women's Employment in 18 OECD Countries', 1975–1999 in *Journal of Marriage and Family*, Vol. 74 (3), pp. 614–630. Oláh L. Sz., Fraczak E. (2013), *Childbearing, women's employment and work-life balance policies in contemporary Europe*, Palgrave. Fahlen S. (2013), 'Capabilities and Childbearing Intentions in Europe' in *European Societies* Vol. 15 (5), p.p. 639-662. Korpi W., Ferrarini T. and Englund S. (2013), 'Women's Opportunities under Different Family Policy Constellations: Gender, Class, and Inequality Tradeoffs in Western Countries Re-examined' in *Social Politics* Vol. 20 (1), p.p.: 1-40.

¹⁵ European Semester Thematic Fiche: Labour Market Participation of Women http://ec.europa.eu/europe2020/pdf/themes/2015/labour_market_participation_women_20151126.pdf. The document does not represent the official position of the institution but indicates that some proposal from the scholars debate are taken into consideration at EU policy level.

¹⁶ Attention should be paid to the quality of women's employment and not just to the quantity, as highlighted above. For instance, across the EU-28 women are more likely to work with temporary employment contracts implying less income security. Women are more likely to work part-time than men with better opportunities for reconciliation of work and caring but with lower career prospects implying professional segregation and smaller future pensions.

- ensuring effective application of equal treatment legislation;
- ensuring the affordability, accessibility and quality of ECEC services, with special attention to those in more disadvantaged situations (e.g. those from migrant backgrounds, low-income households, disadvantaged neighbourhoods, single parent households, etc.) and ensuring sustainable public finances;
- bringing about a reasonable accommodation in employment to enable women with disabilities to enter the labour market.

The European Commission is currently elaborating a comprehensive new initiative focused on the first two issues mentioned above to modernise the EU legal and policy framework and adapt it to today's labour market to allow for parents with children or workers with dependent relatives to better balance work and caring responsibilities. It needs to be said that only last year the Commission withdrew a proposal for the reform of the Maternity Directive after a five-year deadlock between the European Parliament and the European Council.

In 2015, the European Commission published a roadmap on work-life balance in the context of the revision to the maternity leave directive, and launched a consultation (now closed). The aim was to modernise and adapt the European Union's legal and policy framework to the current needs and challenges of working parents (for example, seeking more balanced participation of fathers in childcare, and offering to fathers opportunities to work part-time).

According to the roadmap, the new initiative replaces the 2008 Commission's proposal to revise the Maternity Leave Directive. It will include 'a mix of legislative and non-legislative measures in a consistent policy framework', and the combination of these measures will cover the 'wide range of challenges faced by parents and carers, especially women, as regards to their participation on the labour market'. The new initiative will be accompanied by an impact assessment at every step of the legislative process.

Finally in April 2017 the European Commission proposed the Social Pillar that sets out 20 key principles and rights to support fair and well-functioning labour markets and welfare systems, which are structured around three categories:

- equal opportunities and access to the labour market
- fair working conditions
- social protection and inclusion

The Work-life Balance package is part of the social pillar and is aimed at extending existing rights for working parents and carers so that there's a better distribution of caring responsibilities within families. This will bring more women to the labour market, which is fair, and good for families, businesses, Member States and the economy as a whole¹⁷.

Italy is gradually emerging from the economic and social crisis from which it has been invested in the last few years together with the other countries of advanced economies.

¹⁷ See more details at the European Commission website:

<http://ec.europa.eu/social/main.jsp?vidoesid=2371&furtherVideos=yes&langid=en&catId=1275&>

ISTAT (Italian national statistic institute) data show that the national macroeconomic background is currently expanding. GDP growth is to 1.6%, on an annual basis at the end of 2017, although the intensity of growth is lower than the average recorded by the countries in Euro zone (+ 2.7%) in the same period.

Consistently with this growth, the number of hours worked (+ 1.6%) also increased by the same percentage on an annual basis.

In the same period the positive trend also continues for employment: the number of employed people increased of 1.2% in one year (+ 279 thousand), first of all for short term and full time employees (+ 2.2%).

Part time work, mainly that involuntary, decrease in 2017, following a steady growth that began in 2010, and progressively turn into full-time.

This employment growth and these transformations concern above all women, young people, those with a high level of education and those who live in Southern Italy.

It is particularly relevant to investigate the type of movement that affects women in the labour market. Women, in fact, in particular those between 25 and 34 years (+ 1.2% against + 0.3% of male peers) and with a high degree, (+ 1.4% against -0.5% of men), recorded the highest positive percentage changes in the employment rate between 2016 and 2017.

In the same period of time, it has been reduced the female inactivity rate by 2 percentage points, especially for women in old age (50 - 64 years), compared to that of 0.7% for peer men. The reason of the reduction of the female inactivity rate could probably be related to the important reforms on pension systems in our country implemented in the last years.

A closer look at the inactive group shows that women continue to represent the majority of inactive people, despite the positive trend indicated by rates.

Women represent, in the fourth quarter of 2017, the majority (about 2/3) of inactive people (8.490 women on 13.282 total) and the most common motivation adopted to justify inactivity is linked to family reasons, this is valid for 2.347 women against 113 men.

These employment trends are also confirmed by the first data that ISTAT makes available for the current year (January 2018). These data, however, do not reverse the trend with respect to the gap still existing in our country between male and female participation in the labour market.

Against a general employment rate of 58.1% in January 2018 (the average rate for 2017 was 58%), the male rate stands at 67% while the female rate at 49.3%. There is, therefore, still a gap of 17.7% between men and women in our country, although the steady growth in the employment rate recovered since 2014 was, in the first place, thanks to the contribution of the female component of the labour force.

This difference had been reduced only in the years immediately following the economic crisis that began in 2008, due to a cyclical fact, that is because the effects of the crisis have fallen on traditionally male jobs.

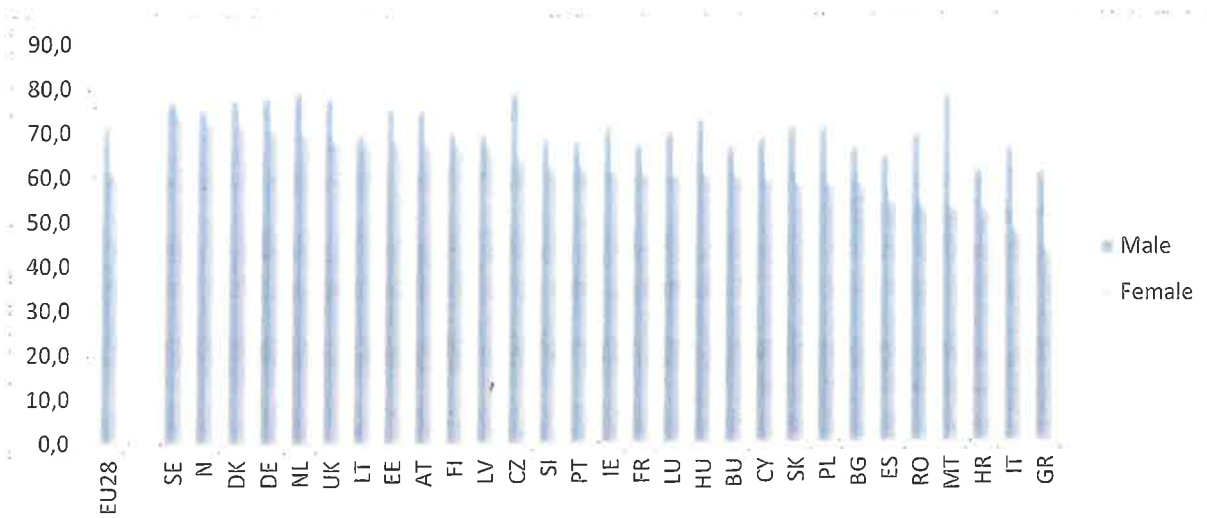
The recovery of the employment rate growth has once again highlighted the gap between male and female participation in the labour market and, in our country, this gap takes a structural feature.

The structural nature is highlighted if we compare the national data with those of the other European countries that have also suffered the effects of the economic crisis.

At European level the employment gap rate existing among the 28 Member States for the 15-64 age group in 2016 is 10.5% (average employment rate for men stands at 71.9% and for women at 61.4%), compared to the Italian one of 18.4%.

Italy, moreover, is the penultimate for the female employment rate (48.1%), followed only by Greece (43.3%), and far from the rates of countries like Sweden (74.8%), Norway (72.8%), Germany (70.8%) (Figure 1).

Figure 1. Employment by sex and age (15-64), 2016



Source: ANPAL calculations using Eurostat data, 2018

The distance between male and female employment rates increases with care duties. This is what happens, for example, with the increase of the number of children.

In 2016 in Europe the employment rate of women without children is 65% while for men it is 72.5%; with one child the rate rises to 70.5% for women and to 84.6% for men; with two children it remains around 70.4% for women while it still rises to 89.2% for men; with three or more children the rate decreases to 55.2% for women while it stands at 83.5% for men.

In Italy, in the same year, these data record the widening of the gap between female and male employment: 67.3% of men and 51.9% of women are employed without children, with one child 78.3% of men and 56.7% of women; with two children 86% of men and 55% of women; with three or more children 81.8% of men and 43.8% of women (in this last case the gap stands around 40 %).

It is evident, even from these data related to care duties, that the working model that still exists today is male breadwinner oriented, while the family model is female caregiver oriented. Both models propose the traditional social division of work between men and women.

In Italy, this division is particularly stressed and indicates a sort of lack of communication between two worlds, that of paid work carried out outside home and that of unpaid work done inside the home.

In 2016, Eurostat data show that Italy has not achieved the objective of covering 33% of childcare services for children 0-3 years (the figure stands at 22.3%), while data from the Labour inspectorate highlight that 30 thousand women have signed their resignation on the occasion of maternity leave. Reconciliation of work and family life issue in Italy is a challenge issue that has more critical aspects than the average of European countries.

It is a political issue on which it is important to intervene so that in our country can be guaranteed both increasingly conditions of equality for women and men in participation in the labour market and the possibility of being able to deal with the various aspects of private life.

Several legislative and policy initiatives have been undertaken to promote a better work life balance. They have recently extended more rights to working fathers and provided new form of work organisation also supported by the technological innovation.

The current legislation, which will be discussed better in the next paragraph, seem unable to return a result that can be sustained and made evident through data.

The existing legislative and policy initiatives should come into operation by taking a dual direction:

1. to allow all women who have care duties to respond to their needs with all existing instruments, both of regulatory and of organizational nature;

2. to balance care duties by guaranteeing fathers the right to reconcile private and working life.

The proposal will provide a useful background to outline the direction to be taken in our country on the path of rebalancing work and family life for women and men.

Currently, in the spring 2018, during the writing of this project proposal, the Directive is being debated in the European Parliament, both in the FEMM committee and the EMPL committee, as well as being discussed in the informal EPSCO Council meetings by the Member States. We know from Council representatives, that there is an overwhelming support for the objectives of the proposed Directive by the Member States, the main discussion points revolve around the approach to their implementation. The two main issues on the table are the payment levels and their sources for the Leaves, and also the cost flexible working and leaves may incur to employers. As the Directive moves in the decision making process through the institutions further this year, 2 possible scenarios are to be envisaged, and our project proposal has both of these in mind.

Should the Directive be approved by the Member States, our project will coincide with the transposition period of the Directive to national legislation. Our project therefore will be in a great position to support national public bodies as well as employers with our collective knowledge and experience on work-life balance, as well as understanding resistance points, challenges in rolling out work-life balance to a large number of stakeholders. Our project will gather valuable data and information in support of the national implementation of the Directive, as well as be a key resource to other EU Member States, who are in similar employment and labour market situation, like Italy.

In case the Directive is not approved as planned during the Bulgarian or the Austrian Presidency, our project will serve as an additional source of arguments to decision makers both at EU and national levels about the importance and the relevance of the Directive. As our project will tackle an issue that is a primordial concern for at least half of the Member States, it will act as a testing ground for measuring the impact of work-life balance tools on unemployment, small and medium sized companies' performance. The project will gather robust evidence on what tools and support services will work and have a positive impact, and via the EU-wide dissemination activities, we will support the continued effort of the European Commission to create both legislative and non-legislative initiatives on work-life balance.

2.3.2. Impact of the Directive on Italy

The previous analysis of needs highlights that women, although highly qualified, at some point disappear from the labour market due to their responsibilities as parents or as carer of older relatives. Care duties still weight heavily on the female component and non-voluntary part time is among the measures that women turn to in order to reconcile the work with care.

One of the obstacles, then, to women's employment is the lack of adequate work-life balance policies. The reconciliation of work and family life has been on the agenda of the European Union since years. Over the years, EU legislators and policymakers have striven to develop a framework to help working parents to balance their working and caring responsibilities and a range of policy and legislative measures have gradually been adopted.

On 26 April 2017 the European Commission published the *European Pillar of Social Rights*, a long-awaited proposal with which the EU shows its full intention to strengthen the implementation of social rights to all Member States. The purpose of the Pillar is to be an efficient guide to new employment rates and to respond to the challenges facing the Union in terms of social rights.

In order to modernize the existing legislative framework, the Commission with the proposed work-life balance directive¹⁸ wants to preserve existing rights and to create new ones for both men and women. The Proposal of Directive focuses on the individual as workers and parents, not hindering forecasts of better favour from the Member States.

It builds on the *aquis* in terms of maternity, paternity and parental leave and flexible working arrangements. Its value is in linking all the measures and presenting a coordinated approach to reconceptualise work life balance.

It has been widely demonstrated¹⁹ that leave and flexible working arrangements tend to rebalance the effects of caring responsibility on the employment level of women. Being able to choose how best organize work and being able to choose how to harmonize the responsibilities of care with work, it will avoid that many women completely abandon the labour market. Today, then, the incentives that should serve to induce men to take advantage of opportunities to reconcile work and family life are scarce and consequently their use is low in many Member States, Italy included. Rebalancing the set of measures available to workers with family duties can help redistribute care duties within the couple. Key issue to achieve gender equality is men's involvement in family and caring responsibilities. There is a clear need of increasing the number of fathers taking-up paternity leave.

The Italian policy, implemented through several instruments and measures, support both gender equality and reconciliation in the workplaces. The national legislation at the first stage had as main objective the protection of women as workers and mothers²⁰ and then evolve towards equal treatment, equal opportunities and positive actions²¹ to promote women's employment and to achieve substantive equality between men and women in the workplace.

Since 2000 thanks to a comprehensive legislation on maternity and work life balance a more global strategy on reconciliation has been launched, both at national and at local level²². Reformed art. 9²³ of the afore mentioned law, has the aim to meet citizens' needs more effectively. In particular, the reform increased the number of parties eligible for funding and of reconciliation needs for which projects can be presented. The law also provides actions for the promotion of innovative services, to be carried out also through the collaboration of local bodies and private subjects, in the framework of the creation of a local network for the reconciliation of work and family life.

The Legislative Decree n. 80/2015²⁴, contains measures aimed to protect maternity and promote opportunities for reconciliation of times of life and work for both working parents. It introduces some important innovations on the institute of parental leave, significantly lengthening the time horizon within which both working parents can take advantage of this benefit.

The Budget Law 2017²⁵ has extended the mandatory leave for employed fathers also for the births and adoptions/custody occurred in the year 2017 and has foreseen, for the year 2018, the increase of the compulsory leave from two to four days.

Issues related to the reconciliation of work and family life have become particularly important also in Italian collective bargaining. At both sectoral and company level, this is seen by companies as a means of increasing flexibility in the utilisation of their workforce in order to be more responsive to

¹⁸ Proposal for a Directive on the EU Parliament and the Council on Work-Life Balance for Parents and Carers COM (2017) 253 final, 2017/0085 (COD).

¹⁹ Eurofound (2017), Work-life balance and flexible working arrangements in the European Union, Eurofound, Dublin

²⁰ Law 30 December 1971, No. 1204 Tutela delle lavoratrici madri"; Law 9 December 1977, No. 903 "Parità di trattamento di uomini e donne in materia di lavoro".

²¹ Law 10 April 1991, no. 125 "Azioni positive per la realizzazione della parità uomo donna nel lavoro"

²² Law 8 March 2000, no. 53 "Disposizioni per il sostegno della maternità e della paternità, per il diritto alla cura e alla formazione e per il coordinamento dei tempi delle città"

²³ Art. 30 Law 18 June 2009, no. 69

²⁴ Misure per la conciliazione delle esigenze di cura, di vita e di lavoro, in attuazione dell'articolo 1, commi 3 e 5 della legge 10 dicembre 2014, n. 183.

²⁵ article 1, paragraph 354, law 11 December 2016, n. 232

demand cycles. The most recent enforced legislation²⁶ contains tax breaks for employers who have signed, or sign, corporate contracts that provide work-life balance measures. The Decree defines the conciliation measures that allow access to the contribution relief. The areas of intervention are: parenthood, organizational flexibility and corporate welfare.

Working time, in terms of flexible agreements, is a well-known issue in collective bargaining and the increase in flexible working time²⁷ is an important feature on a gender equal labour market.

Reconciliation policies, understood as flexible working measures and/or services have to be available to male and female workers. Care duties can be an obstacle for those seeking to enter or return to the labour market. An increase in the participation of this target could be facilitated if in the employment services the different recipients of the active policy can find answers with reference to their need for reconciliation. Referring to services and active policy measures, article 18 of Legislative Decree n. 150/2015²⁸ declines, for example, the services and measures of active labour policy that must be carried out, in an integrated form, towards the unemployed, workers who receive income support instruments during an existing employment relationship and at risk of unemployment.

On the basis of the services and measures, indicated as example by the legislative decree, an integrated approach will be developed, which starts from the needs analysis and the user profiling to build around this a path of retraining and placing on the labour market.

Starting from the current year Italy has adopted an operational tool *Plan to strengthen services and measures of active labour policies* whose general objective is strengthen the coordination of active labour policies and their management in the territory, ensuring multi-level governance through the involvement of regional territories, as implementing bodies, and of ANPAL as a coordinating, monitoring and evaluation body.

This regulatory and institutional framework will be implemented throughout the national territory with the main objective of encouraging a meeting between job demand and quality, and the taking in charge of the recipients of active policies in their different characteristics and needs, actions will be developed aiming to ensure greater flexibility in working time and to facilitate the work life balance. Achieving a better work life balance and balance the demands of a job with caring responsibilities will help to increase labour market participation rates for all workers (particularly for women) in line with EU employment policy targets.

To give a structured answer the project present an integrated approach that acknowledges that care is life cycle. The integrated approach is important because if measures are drafted as single measures they carry the risk to reinforce gender stereotypes. If, for example, children related leaves are not matched with the possibility to introduce flexible working arrangements or if they aren't complemented to affordable child and long term care services they only could defer the circumstance in which the carer, often the woman, will exit the labour market.

The project is addressed to the recipients of active policy and employment services and to the employees in small and medium-size enterprises.

The combination of the proposed measures should have positive effects on companies and local territories through the introduction of targeted intervention at national level to promote a modern work life balance approach, as explained next.

²⁶ [Interministerial Decree 12 september 2017](#)

²⁷ Introduction through the Law 22 May 2017, n. 81 of measures for the protection of non-entrepreneurial self-employment and measures to encourage flexible articulation of time and place for employees.

²⁸ [D.Lgs. 14 settembre 2015, n. 150, Disposizioni per il riordino della normativa in materia di servizi per il lavoro e di politiche attive](#)

Demographic trends, digitalisation, globalisation and economic forces shape the world of work. This can include in the narrowest sense people in work, or if it is broadened out, also the unemployed, defined as people without work but actively seeking employment and currently available to start work. There is, however an additional group of people that are concerned, who are currently not in employment, and neither considered as unemployed, because due to family caring responsibilities they have fallen out of this category, and have been away from the labour market for a number of years.

Work-life balance policies are mainly discussed and tackled in relation to people in employment and struggling to reconcile their work and family responsibilities or their private passions and civic engagement. Reconciling work and family life can also mean, that the care for family members may require women or men to completely step away from formal employment during a period of time, often years to care for the other person. There is also a universal pattern we can observe for certain types of job-seekers, who are also family carers or parents of young children. They apply for work and also secure employment, which is usually full-time or shift work, and they attempt to juggle both the work and the care responsibility for a while, but then the carefully balanced system falls apart, either due to long commuting times, the incompatibility of care services and their working hours, and are forced to leave their jobs. Certain sectors like the cleaning industry, hospitality, and other sectors requiring mainly low-skilled workers experience a high rate of churn of these employees. This costs money to the sector (continuous recruitment and training costs), and puts a mental and financial strain on the person.

In certain European countries and regions, the current economic and labour market trends mean that the discourse is slowly shifting towards the group, mainly women, who are neither currently employed, nor registered as unemployed, and to focus specific programmes and initiatives on their inclusion on the labour market.

We know from a number of Eurofound studies, that the care of older or disabled relatives and dependants can lead to more frequent work-life balance problems than childcare. Providing informal home care places a substantial demand on sections of the working population and affects whether and to what extent these individuals can reconcile their work and care duties. Those who care for dependent family members for a prolonged time may experience isolation, a reduction in social inclusion and suffer from mental health issues, in addition to relatively frequent physical symptoms.

Therefore the regions and countries in the EU need to tackle a variety of issues related to work-life balance, and moreover extend the notion to also include those who are outside of the formal labour market due to care responsibilities. These measures, as proposed by the European Commission recommendations focus on a few axes, with a focus on childcare (boosting the availability and accessibility), modernising leave systems to foster a more equitable and easier conciliation of work and care, as well as the updating of internal work-life balance measures within companies and employing organisations, such as flexible work, teleworking, compounded hours...etc. But it is one thing supporting the work-life balance for people in employment, and another tackling the group that is not in employment, and perhaps not even registered as unemployed due to care responsibilities. A fresh integrated approach, a combination of different tools is required to understand the needs of this segment and to respond to it effectively.

A number of active labour market policies in the different member states are attempting to tackle this

issue, from up skilling to flexibilization of working time and offering either part-time or other reduced hours of paid work. There has been some degree of innovation to tackling unemployment in the past decades, but none of them really brought a break-through. One may argue this is due to the rigidity of the employer's side of employing manpower that may not fit their image of the "perfect candidate". The Ideal worker norm or type has been extensively researched by scholars dating back to the 1980s, referring to employers preferring to employ someone, who is fully skilled, ready to attach the work, fully committed and has no outside of work responsibilities or distractions. Therefore employers, as well as training institutes, the recruitment industry and largely other labour market mediators have focused their attention to the Ideal worker. Several different groups have therefore been ignored and rejected by employers, women, migrants, people with disabilities, learning difficulties or mental health issues, people with demanding care responsibilities or LGBT.

In the past 10 years however, a couple of new trends have added to the complexity of matching labour market demand and supply. In addition to formal governmental policies and interventions, a number of start up companies have also entered this space, offering work opportunities in the space of the gig-economy to those who would like to either combine work with care responsibilities. These money-earning opportunities (usually these gig workers are not considered as employees) offer unemployed, students, retired, carers and anyone who is looking for these jobs an opportunity to deploy their skills and competences and earn money.

The workforce is definitely diversifying, and employees and job seekers no longer just conform to one type. A number of companies and organisations are starting to see the societal and business value of diversity and are making deliberate efforts to diversify their workforce through changing their recruitment channels, making their working hours and time more flexible, including different forms of employment, as well as broadening their understanding of the place of work, including home-based work. In order to allow parents and carers to find meaningful jobs, innovation needs to take place both in the way the jobseekers are supported, and also empowering and training employers to change the way they hire, train and employ people.

1.5 Successful Work Life Balance Initiatives and How EO&WJ will build on them

As one of the main outputs of the project will be to elaborate and test a set of strategies, a new model of intervention and a toolkit including guidelines, we already reviewed a number of successful and innovative initiatives from different sectors, and will continue reviewing them in the beginning of the project to understand what works, what are the cooperative elements and success factors to feed our own development. Here are a couple of examples of successful tools and programs, or initiatives in different countries in Europe, which may inspire our reflection in the framework of this current project:

Women Re-Boot (Ireland)

Women ReBOOT is a new programme aimed at providing support for ICT "returners" or women in the IT sector who are returning to the workplace after a career break, due to either maternity leave, or a longer break following family caring responsibilities. The ICT sector is need of a large number of skilled employees, and women, who have had a high level of education before taking time out from work are ideally placed to be upskilled for these jobs. It's not only a matchmaking programme, but has a very active preparatory phase, during which the women are mentored and helped all the way with a workplace placement. The ICT sector in addition is highly adapted to suit the work-life balance needs of parents and carers, as many of the jobs can also be done from home or in flexible

schedules.

The programme is free to jobseekers, supports them in taking those first steps back into the sector.
Women ReBOOT:

- Enhances women's professional development at group seminars that support the development of the skills necessary to re-engage with the ICT sector - including CV preparation and interview skills.
- Builds their confidence through one-on-one professional coaching - helping them to define a new career vision and articulate their own personal action plan.
- Helping them to refresh their skills to reflect recent changes in the technology sector, through an online training platform. and work experience
- Introduce you to our technology business partners through mentored company work placements, to help you familiarise with the tech sector of today

(<http://www.softwareskillnet.ie/women-reboot/>)

Lulu dans ma rue (France)

This French start-up is organised on the principles of the sharing economy. It was started back in 2015 with the idea of using the abandoned "kiosks" in Paris as a meeting place within that small community, where some inhabitants needed help with odd jobs like dog-walking, plants watering, moving, assembling furniture, and there were others who were available and possessed the necessary skills to do those small jobs. The physical kiosks and the online platform offer the matching between those seeking help, and those able to help. The main objective of this innovative start-up is to bring together communities, break down the isolation of elderly or vulnerable inhabitants and reinvigorate the communal spirit, all the while helping with real needs. Many of the "Lulus" or service providers come from socially disadvantaged groups and people who are unemployed - the service restores their sense of purpose, self-worth, gives them opportunities to interact with society and also broaden their network to people who they wouldn't normally interact with - which according to network theory is how most people find jobs. The way this service operates could serve as an inspiration for our thinking of developing the tools for our project. The service can also connect informal care providers with job seekers for example, to enable them some free time to take part in a course or go for an interview. This may be a way to break down social isolation of single parents, migrant parents for example.

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

Intersectionality between family policy and unemployment (Germany)

Building synergies and cooperation between the different sectors of public service is vital in the case of unemployed or jobseekers with family responsibilities. The city of Berlin has such an integrated approach, and understands the specific needs of parents and carers who are not in employment or have lost their work. They tackle both the care-needs of the family members by referring job-seekers to a number of different care service providers, and also support them with alternative employment opportunities, as well as a possible pathway to entrepreneurship and self-employment.

<https://www.berlin.de/familie/de/informationen/wege-aus-der-arbeitslosigkeit-217>

Supporting entrepreneurship for parents or carers

A number of employment agencies have branched out into supporting people on unemployment

benefits with training, skills and information about becoming self-employed. The internet and digitalisation is offering an unprecedented platform for individuals to work for themselves, selling services or products locally or to a wider customer base online. This type of activity can be very attractive to parents of young children, who do not find suitable childcare to suit a full-time job (or sometimes even part-time job) as well as for people caring for a disabled or elderly relative. Often, this support is also combined with a specific incentive to reinvigorate certain regions, where economic activity is low and unemployment is relatively high.

Belgium: <https://www.leforem.be/particuliers/aides-financieres-creation-activite-independant-airbag.html>

Building employers' awareness and capabilities about work-life balance and integration

Just as much emphasis is placed on supporting the jobseekers on their path to employment by offering childcare, training, coaching and other types of support, employers also need to be both supported and skilled in adapting their (sometimes outdated) hiring and employment policies. Organisations that have not yet embraced flexible work, alternative schedules, self or team-rostering, tele-working, smart working, and other forms of work flexibility, to suit around the schedules of working parents and carers.

A number of projects have already taken place, for instance Erfolgsfaktor Familie, a network of 6000 employers in Germany, supported by the Federal Chamber of Commerce and Industry supports their members and employers in general with information, training, networking and also the Business Case for family friendly employment. A number of audit and benchmarking organisations help employers by first diagnosing the current situation within the company, then helping them see themselves benchmarked against others in their sector, and supported with practical recommendations and training to change HR policies, Health and Safety measures, the necessary IT infrastructure, internal communication, facilities and their recruitment and on boarding processes.

The EQ&WL project will adopt a **cooperative learning approach** involving all co-applicants, with the expert support of associated partners, in order to:

- select and adapt existing tools and practices at EU level focusing on Work Life Balance to project target groups. In this process WLB HUB experience and knowledge of EU work life balance most relevant experiences and ANPAL knowledge of the main characteristics of PES's services needs will be integrated by FGB experience in building user friendly toolkits and guidelines.
- build a business case for SMEs implementation of work-life balance friendly environments. In this process WLB HUB and IWEO experiences will be integrated with and CGM knowledge of social economy companies
- select and adapt existing learning materials on gender bias on re-conciliation issues, and mainly on the greater role men can have in sharing caring duties and responsibilities, moving from the knowledge and experience of REFORM, the Norwegian association of Fathers
- Build a toolkit and a set of guidelines
- Train the pilot users of the Toolkit
- Monitor the testing exercise - see below for further information
- Finalise a toolkit for further exploitation

In the framework of the EQ&WL proposal the applicant, the co-applicant and the associated partners have selected each other with a view to the added value they could bring to the implementation of the different phases of the action. Their active participation in the phase of the definition of the proposal has allowed to clearly defining roles, tasks and expectations, which are allocated according to organisational/individual expertise. A mutual learning approach implying a continuative sharing of information will be during all project lifespan, involving the applicant and the co-applicant as well as the associated partners whenever possible.

The following paragraphs detail the activities of the proposal and the role of partners, the GANTT chart shows the role of each partner in different phases.

3.1.1 Overview of project work programme

The project implementation is organised in six phases, covering project start up, testing of EQ&WL toolkit, data analysis, general project evaluation, dissemination and project management. The first five months (Phase 1) will be devoted to: project start & set-up, refining the comprehensive toolkit and model of intervention; training PES staff and creating local networks of SMEs among which raising awareness on work life balance needs of employees Phase 2 (months 6-18) will be devoted to testing of the EQ&WL model of intervention and toolkit with around 192 unemployed persons in 4 Italian Regions. In this phase awareness raising activities among SMEs on work life balance will be also conducted and monitored. During the following 4 months (Phase 3), data collected during the experimentation will be analysed and interpreted to address our key research questions on the effects of our experimentation and to identify causal explanations for different effects. Monitoring and evaluation activities on the research process and outputs will be conducted with the support of the stakeholders involved in the project (Phase 4 – months 1-24). The up-scaling strategy process and follow up activities will be aimed at disseminating the action to both immediate stakeholders and a wider audience in the areas involved in the project (Phase 5 – months 2-24). The definition of a detailed dissemination plan as well as the role ANPAL can play in the up-scaling process will serve this goal, while a transnational final conference in Italy and the publication of a final report will act as additional dissemination tools (Phase 5, months 3-24). Phase 6 (months 1-24) will be devoted to project management and coordination, including periodical reporting to the Commission and attending to scheduled meetings in Brussels. Overall, the project is designed to maximize opportunities for cross-regional comparison of findings.

The following paragraphs present an overview of the activities which are detailed in the document “Detailed Workplan”

3.1.1 Phase 1 Project start up

The overall goal of Phase 1 is to put in place the organizational and procedural framework in order to guarantee smooth implementation of the action.

A kick-off meeting will be organized within the first month of the project in Rome involving the participation of all project co-applicant and as much as possible associated partners. The project aims and steps will be discussed and consolidated and there will be the opportunity for partners to settle project management and organisation activities, financial, administrative and logistical issues. Partners will agree on the on the model of intervention, the *toolkit framework*, awareness raising activity plan and on the research guidelines, which will operate in all Regions. The model of intervention, the toolkit framework, the awareness raising activity plan among SMEs and the research guidelines will be proposed by the applicant in cooperation with WLH HUB and FGB.

During the following four months applicant and co-applicants will share knowledge, practices and tools in order to define the model of intervention, the toolkit, the awareness raising activities plan and the research guidelines. With the aim of maximising the participation of transnational partners while minimising costs, web conferences facilities will be used in order to organise a set of workshop involving all co-applicants and aiming at selecting effective work life balance strategies and practices and adapting them to the toolkit. The model of intervention, the toolkit and the awareness raising activities plan so obtained will be the result of the cooperation among international group of experts in work-life balance and employment.

A special focus in the toolkit will be placed in the definition of the business case for implementing Work Life Balance in SMEs, based on the insights shared by IWEO from the Spanish network experience and the design of a plan for awareness raising activities. During this phase piloting procedures will be finalised (see paragraph below) as well as training contents for PES' personnel who will implement the model of intervention and the toolkit; training contents will be defined according to their exigencies and with their direct involvement.

Given the experimental character of EQ&WL the continuous participation of a team of researchers/trainers is provided. Every researcher/trainer will be in charge of cooperating with the PES personnel in their activities related to the project and in collecting relevant data and information for the monitoring/evaluation activities requested for the evaluation activities.

In the last two months of this phase local networks for work life balance services delivery will be activated.

Duration: months 1-5

Outputs:

- Toolkit framework and outline (EN, IT)
- Training materials
- Business case for Work Life balance in SMEs and raising awareness activities plan
- Research procedures and manual for project delivery
- Local networks for work life balance services delivery

3.1.2 Phase 2 Testing EQ&WL toolkit

The methodological approach: quasi-experimental design of the project

EQ&WL is an intervention study, employing a quasi-experimental quantitative/qualitative pre-post within and between group design. It envisages the design and quasi-experimentation of a model of intervention and a work-life balance toolkit to tailor interventions for every single case. The quasi-experimental design will be adopted for a threefold evaluation: first, for the evaluation of the model of intervention adopted during the project by PES personnel; second, for the assessment of the tools included in the toolkit designed during the initial phase of the project; third, for assessing the awareness raising activities conducted among the SMEs involved in the project.

The three aspects will be the objects of the evaluation activities.

The assessment of the effectiveness of both the intervention model and the toolkit will be conducted by applying a quasi-experimental design²⁹ The dependent variable is the probability for the person unemployed to find a job during the time of observation.

²⁹ Shadish W.R., Cook T.D., Campbell D.T., (2002), Experimental and quasi-experimental designs for generalized causal inference, Houghton Mifflin Company.

Among the independent factors that the quasi- experimental design will control for, we considered:

- assignment to intervention (adoption of the new model of intervention; usual model of intervention),
- age
- gender
- specific context of the labour market in the region and the locality particularly the demand for labour by SMEs)

Specific work-life balance needs (children 0-2; children 3-6; elderly to care for; people with disabilities to care for; combination of the above).

Other independent variables will be considered in the quasi-experiment by applying the comparison within the same experimental group.

The awareness raising activities plan will be assessed by collecting questionnaires among SMEs on the perception of the relevance of work life balance issue before the intervention and after the intervention and on the effectiveness in employee retention of work life balance policies.

Because of the complexity of interventions used in the EQ&WL programme, robust methodological approaches especially designed for such studies are required. The same quantitative and qualitative methodological approach is used in all the selected Italian regions/localities. The argument for this is that if we obtain the same changes or similar trends in dependent variables in all selected localities, it will be easier to assess whether the change results from the EQ&WL intervention. To assess the effects, mixed methods will be used: questionnaires to be administered to the unemployed persons involved in the experimentation at four different crucial steps of the project (their initial involvement, after the initial consultation, three months after the design of the individualised project, 12 months after the design of the individualised project); initial interviews with managers and PES personnel involved in EQ&WL at local level; participant observation in every PES delivering the new model of intervention with weekly reports (to be delivered by e-mail to the project coordinating team), 2 national focus groups with PES managers and staff involved in the project (1 focus group for managers and one for the staff); questionnaires to be administered to SMEs involved in the project in the localities at the beginning and at the end of the experimentation.

Duration: months 6-18

Outputs:

- List of select participants (testing and control group)
- List of SMEs involved
- Testing activity for 192 unemployed in 4 regions
- Testing awareness among the SMEs involved
- Testing report

Once data has been collected from participants FGB research staff will enter these into SPSS (Statistical Package for the Social Sciences), which is the standard statistical package used in social science research of this nature. All data collection will be complete and entered by month 20 of the

project. At this point analysis will be undertaken to address the research questions and predictions posed.

Duration: months 19-22

Outputs:

- Report detailing the findings of the social intervention. This will outline the purpose, findings, and project implications and be used for the purposes of project evaluation.

4.1.4 Phase 4: Monitoring and Evaluation

Monitoring activities involve all project steps as well as an evaluation of the EQ&WL toolkit in terms of its transferability, cost-effectiveness, and feasibility, and quality of the research will run in parallel with research activities. The monitoring and evaluation process will be conducted and supervised by one of the partners - FGB - with wide experience in evaluation methodologies and practices of social researches and studies. FGB will indicate one senior researcher – Silvia Sansonetti – whom will be dedicated to monitoring and evaluation with no involvement in other project activities.

Project managers and scientific coordinators, as well as the rest of the project staff, throughout the entire process of the project, will support her. She will involve stakeholders in order to accumulate and share the knowledge needed for drafting and implementing the up-scale strategy.

The monitoring system will include design, preparation of materials, recruitment of participants, the intermediate steps of the entire participants' journey, data treatment, results delivery, measures to ensure ownership and scale up in case of success—especially the activities aimed at Stakeholders.

Two Intermediate Monitoring Reports will be delivered at month 8 and 16 of the project lifespan, and a Final Monitoring Report will be delivered at month 20 of the project.

The evaluation will address the following elements: *merits and implementation of the study; cost effectiveness; transferability and up-scaling; feasibility*. The evaluation will combine analyses of the data collected throughout the study, of the information collected through the monitoring system, and data gathered through original research by the evaluator. While the results will be utilized in the final phase of the project, during the up-scaling and dissemination process, evaluation activities will start since the beginning of the project and last throughout the timeline of the project.

An Intermediate Evaluation Report will contain the results of the evaluation process at month 12, aimed to readjust if needed the social experiment using also the monitoring data and results.

At the end of the intervention the Ex-Post (Final) Evaluation Report will be delivered, including an assessment of the possibility of extending the intervention to the wider regional population;

Duration: Months 1-24

Outputs:

Two Intermediate Monitoring Reports

Intermediate Evaluation Report

Final Monitoring Report

Ex Post (Final) Evaluation Report

4.1.5 Phase 5: Dissemination and Up-scaling Strategy

Phase 5 will be devoted to setting up appropriate strategies for up-scaling the proposed model and toolkit and for disseminating it to a wider audience. First of all, the strategy recalls on the importance of having a heterogeneous partnership that not only lends the project stability in delivery terms, but provides a breadth of perspectives, external links, channels of access and credibility with multiple external up-scaling audiences.

It will be key for the involved project partners to drive an on-going and well crafted outreach and communication during the project for it to succeed, therefore we propose the creation of a Communication and Awareness-Raising Strategy. It's main parts are described in the below section.

The Strategy will be built upon two separate, but closely linked, parts. It's aim is to describe how the objectives of the project will be met and support the coordination of the various activities. These are: the internal project communication, and the external awareness-raising outreach.

Duration: months 3-24

Outputs:

- Project visual identity and information material (IT, UK)
- Awareness Raising and Up-scaling strategy
- National Stakeholder's Events (two per countries)
- Final Report (IT, EN)
- Final Conference

3.1.6 Project management

In order to ensure a smooth and effective implementation of project activities, the applicant, in parallel to ordinary project management and coordination tasks (such as overall project coordination, including contacts with partners, administration issues, liaison with the European Commission) has envisaged a series of specific project management activities that will run in parallel to the implementation of the phases outlined above. These tasks can be summarised as follows:

a) Setting up of the Steering Committee

Given the innovative nature of the action and in order to fully exploit the specific capacity and competence of partners in the field of work life balance, a Steering Committee (SC) will be constituted with the aim of providing technical guidance for the advancement of project activities and to ensure quality of results. The Committee will be composed by one representative per partner (applicant + co-applicants), it will be chaired by applicant, ANPAL. The Steering Committee will meet three times during the implementation of the project, in conjunction with project events. Teleconferences or Skype meetings will be held whenever necessary and at least once a month.

b) Steering Committee Meetings

Within the first month from the start of project activities, a kick off meeting will be organised with SC members. The purpose of this first meeting is also to present and to jointly agree on project management and organisation activities, financial and administrative issues, logistics, etc.

In addition, during the kick-off meeting, SC members will discuss about the toolkit framework, the training package, criteria for the identification of participants to piloting phase. The SC will discuss the research's structure and activities as outlined in this proposal and further detailed by the applicant prior to the meeting, and draft the guidelines for its organisation. SC members will make proposals for the participation of Associated partners in different phases of the project.

In the light of project results, findings and advancement, participants will be in a position to discuss the possibility to undertake any necessary remedial action or to fine-tune project methodology.

Two other steering committee meetings will take place in parallel with other project events. In particular, the 2nd SC meeting will be organized in Rome in parallel with the Transnational Stakeholders' Meeting (month 12); the 3th SC meeting will also take place in Rome, in parallel with the final conference.

Duration: months 1-24

Outputs:

- Steering Committee set up
- 3 Steering Committee meetings
- Internal communication strategy
- Intermediate report
- Final report

3.2 Applicant and associated partners' roles in the project

Partner	Type of organisation	Role	Responsibilities and tasks
ANPAL	National Public body	Applicant	Project coordination, Scientific coordination Responsible for Up - scaling activities
CGM	Association of companies	Co-applicant	Support to tool kit definition and piloting – bringing SMEs perspective
WLB HUB	European consulting company	Co-applicant	Support to tool kit definition providing insights on EU strategies for Work life balance strategies; coordinating dissemination at EU level
IWEO	Public Body	Co-applicant	Support to tool kit definition providing insights on Spanish experience in building the work life balance business case for companies, contributing to dissemination at EU level
REFORM	Private association of citizens	Co-applicant	Support to tool kit definition providing insights on how to promote a higher participation of men to care duties and responsibilities, contributing to dissemination at EU level
FGB	Non profit research centre	Co-applicant	Designing and implementing the monitoring and evaluation system for assessing the piloting experience, elaborating toolkit and guidelines, coordinating Italian dissemination activities
UIL	Social partner	Co-applicant	Support to tool kit definition providing insights on social partners perspective (resistances, points of strength) including focus on company welfare and firm level agreements
Regione Campania	Regional public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation

Regione Toscana	Regional public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
Regione Piemonte	Regional public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
Provincia Autonoma di Trento	Local public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
CEEP	European social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the EU social partner perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
ETUC	European social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the EU social partner perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
Italian Equal Opportunity Body	Public body	Associated partner	Support the assessment of the toolkit and its assessment, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
INPS	Public administration	Associated partner	Supporting the definition and assessment of the toolkit providing access to contextualized data for monitoring and evaluation, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation

CGIL nazionale	Social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the national trade union perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
CISL nazionale	Social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the national trade union perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation

Phase	Description	Partners involved*																												
			1	2	3	4	5	6	7	8	9	0	1	1	1	1	1	1	1	1	1	1	2	2	2	2	2	2		
1	Project start & set up																													
1.1	Kick off Meeting	ANPAL + ALL																												
1.2	Toolkit development	ANPAL + FGB + CGM + WLB HUB+ IWEO + REFORM + associated partners																												
1.3	Training PES staff on the use of the toolkit	ANPAL+ FGB + Associated regional partners																												
1.4	Creating local networks for service delivery	ANPAL+ FGB + Associated regional partners																												
2	Testing EQ&WL toolkit																													
2.1	Toolkit piloting	ANPAL + Regional Associated partners + CGM																												
3	Data Analysis	FGB																												
3.1	Data screening	FGB																												
3.2	Data analysis & interpretation	FGB																												
4	Project Monitoring and Evaluation	FGB																												
4.1	Monitoring and evaluation reports	FGB																												
5	Dissemination and Up-scaling Strategy	WLB HUB (EU dissemination)+ FGB (national dissemination + all																												
5.1	Project visual identity	FGB																												
5.2	Online Social Package	FGB + all																												
5.3	National Stakeholders Events	ANPAL + associated partners																												
5.4	Transnational Stakeholders Meeting	ANPAL + all																												
5.5	Toolkit guide elaboration	FGB + all co-applicants																												
5.6	Final Report	FGB + all co-applicants																												
5.7	Final Conference	ANPAL + all																												
6	Project Management	ANPAL + all co applicant project managers																												

The EQ&WL consortium pays a great attention to the evaluation and monitoring of the activities, given the social innovation dimension of the action. As detailed in the previous paragraph one phase of project implementation phases – phase 4 - is dedicated to monitoring and evaluation of planned activities.

The specific objectives of the evaluation process will be:

- ensure the credibility of the study and piloting component of EQ&WL,
- explore transferability, cost-effectiveness, and feasibility of the EQ&WL model and toolkit. In order to do so, it will explore the meaning of any unexpected fact, and assess the effects of attrition and non-compliance on the solidity of the results,
- share the comprehension of the nature, utilizability, limits, and strengths of EQ&WL model and toolkit with the network of implementers and stakeholders, in such a way that they may utilize this knowledge in scaling up the intervention and that their knowledge is appropriately summoned,

The evaluation will combine analyses of the data collected throughout the study, of the information collected through the monitoring system, and data gathered through original research by the evaluators, as detailed below.

While their results will be utilized in the final phase of the project, during the up-scaling and dissemination process, evaluation activities will start since the beginning of the project and last throughout the timeline of the project.

An **Intermediate Evaluation Report** will contain the results of the evaluation process at month 12, aimed to readjust if needed the social experiment using also the monitoring data and results.

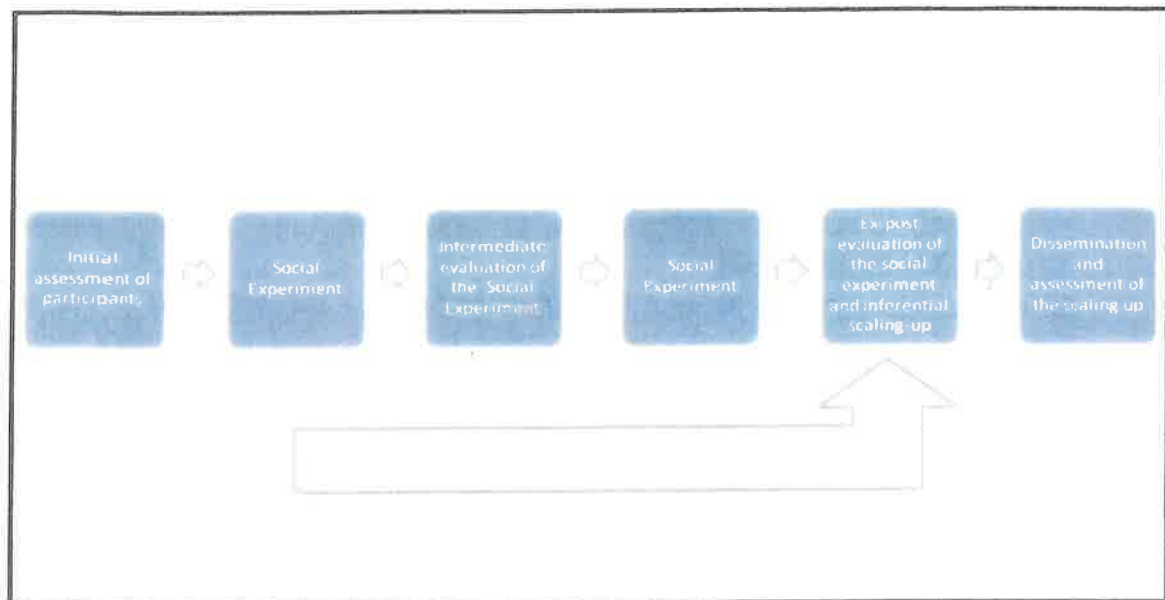
At the end of the intervention the **Ex-post (Final) Evaluation Report** will be delivered, including an assessment of the possibility of extending the intervention to the wider regional population;

1.4 Assessing merits and implementation of the action

The evaluation will take into consideration the *merits and the implementation of the action*, following its theory. First, it will:

- analyse the identification of pilot activity participants and identify whether and which kind of sub-groups there are.
- make sure that the treatment and the control groups are separated since the beginning of the study and remain separated throughout it. This task will be performed by analysing the baseline assessment data and by complementing it through interviews of project staff, PES' staff, and study participants (both in the treatment and in the control group).
- assess the impact on study results of the various forms of attrition and non-compliance. Non compliance may derive from participants assigned to the treatment group who do not, in the end, access the treatment (*no-show*) or who abandon it before completion (*drop-out*) or who, albeit being assigned to the control group, manage to secure at least some level of treatment (*cross-over*). Analysing data produced through the study will perform this task.
- ascertain the effectiveness of the training (actual time and effort spent in training activities by PES' employment staff, achievements of the tasks set by the training system) and

The Graph below summarizes the described monitoring and evaluation process.



5. Is there a quality assurance plan?

Quality management is one of the Consortium major concerns and the Steering Committee meeting will define a **Quality Assurance Plan** at an early stage of project implementation – during kick off meeting.

The quality plan will focus on a number of key issues essential for successful project implementation, including the success criteria for the project and the understanding of the key requirements of DG EMPL, the organisation and responsibilities, communication lines and procedures, a detailed activity planning of the project as well as an overview of expected deliverables and quality assurance requirements associated with each individual deliverable.

The main criteria in the definition of the Quality Assurance Plan will be:

- the appropriateness of methodological approach;
- the adequacy of data sources and collection methods;
- the correctness of analysis methods applied;
- the conformability of interpretation of findings;
- the consistency of conclusions.

The objectives of the Quality Assurance Plan will be:

- understanding to what extent the objectives of the assignment are being met;
- understanding how our intended impact is likely to be achieved;

- enable any adjustments to be made for the assignment to “stay on track”.

The activities listed in the plan will aim:

- to ensure the effective and successful delivery of project through continuous review and adaptation;
- to support the project management activities through the identification and addressing problems as early as possible;
- to evaluate the ongoing process of methodological approaches;
- to identify changes in the approach/tools to be implemented in order to adapt the proposed strategy to different targets.

All deliverables will need to meet the highest professional standards. This is ensured by the professional qualifications of our experts proved by their CVs. The Project manager will guarantee that all reports are written in a clear and concise manner and timely delivered according to the work plan. A continuous contact will be maintained with the DG EMPL staff services regarding the advancement of reports preparation.

The quality of the English language of all deliverables will be subject to special attention.

Language and style

The EQ&WL team is very conscious of the importance of the language and the style adopted in presenting the information. For this reason, intermediate and final deliverables will be written in a clear and concise language, avoiding jargon and allowing the reader to clearly understand the content and evidences of different outputs.

Visual images – such as diagrams, synthetic tables, info graphics – will be used as much as possible in order to give a clearer view of connections and assessments. All deliverables will be reviewed and checked. Each assignment will be subject to a check, in terms of quality and accuracy of content.

In brief, bearing in mind the whole implementation of the action, the quality of the working team and of the methodology applied, the high quality of the deliverables will be ensured throughout:

- the quality of contents and the quality control of scientific material;
- the balance in reporting: objectiveness, gender balance and impartiality of the research;
- the style and presentation, referring both to the language and the templates.

Output quality check

All the reports and all outputs will fully comply with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo.

Content and language editing will follow the following checklist:

Adherence to the Call for proposal

Are the questions/issues included in the call for proposal addressed satisfactorily?

Does the report provide additional information that might be essential for the commissioners of the assignment?

Does it explore successful practices as well as gaps and issues?

Defensible design and methods:

Were the construction of the method and the choice of tools justified properly?

Were the reference situations chosen (counterfactual or similar) appropriate for making valid comparisons?

Was the methodology described in enough detail for the quality to be judged?

What methodological lessons can be learned for the future?

Reliable data used

Have available sources of information been identified and has the reliability of this data been checked?

Were the techniques used to collect the chosen data robust, complete and suitable for answering the evaluative questions?

Was the mixture of qualitative and quantitative data appropriate for a valid analysis of the issue or phenomenon?

Coverage and multidisciplinary approach

Have the issues been dealt with under a multi-disciplinary perspective?

Has most of the relevant existing work within the scientific community been taken into account, including research that challenges the contractor's own results?

Sound analysis

Were the relations of cause and effect underlying the analysis sufficiently explicit?

Was the quantitative and qualitative analysis underlying the conclusions sound?

Were the interpretative hypotheses and extrapolations justifiable, and have the limits of validity been defined?

Impartial conclusions

Have results been presented fully without omission, has the most recently available information been mentioned and considered?

Do the conclusions accurately reflect the findings and the evidence presented?

Were the conclusions operational and presented in such a way that they can be followed up and implemented?

Were controversial questions or issues presented in a fair and balanced way?

Are the elements on which the conclusions are based clear?

Has factual accuracy been ensured?

Clear report with executive summaries and annexed supportive data

Was the report written clearly and set out logically?

Were specialised concepts used only when absolutely necessary and clearly defined?

Did presentation, tables and graphs enhance the legibility and intelligibility of the report?

Were the limits of the assignment, in terms of scope, methods and conclusions, clearly shown?

Is the text free of spelling and grammatical mistakes?



The cost effectiveness analysis is based on a comparison of positive outcomes (measured by relevant metrics of employability and individual well being) and costs (computed in monetary terms, in this case in Euro,) connected with alternative options. The two options are defined, in this case, as a comparison between the outcomes of the EQ&WL intervention with a “work life balance as usual” option.

Outcomes of the two options will be taken from the study, and will be measured by the same metrics it utilizes. The costs of the EQ&WL option will include:

- costs of defining the toolkit (as initial investment, absorbed in the framework of project implementation),
- costs of training PES’ staff (computed by adding in the cost of their time, measured by their hourly salary; the costs of retaining instructors; and the costs of renting facilities to deliver the training or the opportunity cost of using own space),
- the additional costs of adopting EQ&WL approach (in terms of the cost of staff time, redefining procedures, adding steps to consultancy, using additional spaces) in the process of supporting unemployed people
- the costs of developing and reproducing training materials
- the costs of administering tests to all participants, and
- the costs for study participants to the piloting for one year
- the costs for awareness raising activities among SMEs

These costs are probably overestimated: in looking for cross-over effects, the evaluation will collect information on whether there are viral effects of awareness raising on work life balance benefits for individuals and companies that might involve other people in the new activities, thus spreading their newly acquired skills. This effect will be assessed by asking PES’ staff providers, stakeholders, and study participants (both in the control and the treatment groups) and by involving people from the participants’ closest community—such as other people in the same residential care facility, neighbours, or family members.

The cost of the null option is conservatively equalled to zero. This actually underestimates costs, because the null option (not providing person looking for a job with work life balance integrated strategies or services) implies costs as well. For example, control group study participants, who lack tailored support may result in not entering/remaining in the labour market and/or having to cover the costs of not being supported in their work life balance needs. PES staff and companies also incur higher costs, because it is likely that they would spend time/money to identifying emergency strategies in the absence of a “ready to use” toolkit.

The consortium will take into consideration all these elements in assessing the EQ&WL model and toolkit and awareness raising activities among SMEs, in order to assure a cost effectiveness in the implementation of the action and its up-scaling.

The added value of the proposal stands in its integrate, innovative and multi-stakeholder approach which combine:

- the aim to define strategies and collaborations schemes focusing on Work Life Balance, gathering multi-stakeholders partnerships (PES, SMEs and social partners) and promoting a non-stereotyped approach to Work life balance
- the aim to define and test concrete tools supporting Work Life Balance and incorporating some of the most significant experiences at European level (see IWEO and REFORM contributions to the project)
- the focus on PES in one of the European countries in which the under representation of women in the labour market is more evident, offering a set of strategies and a toolkit addressing Work Life Balance needs suitable to enhance both the quality and the quantity of jobs PES can provide access to.
- the simultaneous focus on SMEs, and mainly small companies in social economy, which at the same time represent the economic group whom potentially offers more opportunities for women with the strongest difficulty in implementing Work Life Balance policies
- the high scalability of the results which may results in the adoption of the EQ&WL strategies and toolkit but the national network of PES
- the consistent European dissemination strategy - see point 3.1.6 conceived to share the results of the project with a wide audience via the EU social partners

In addition, the composition of the Consortium, as a multi-level European partnership suitable to implement the activities and to ensure the sustainability of the action, answering to the call specific request and constitutes a point of strength of the proposal. Promoted by the Italian National public body responsible for PES (ANPAL – applicant) with a support of a selection of Italian Regions (Campania, Piemonte, and Toscana) and one Autonomous Province (provincial Autonoma di Trento) directly responsible for managing employment services, EQ&WL involves an umbrella association of SMEs in the social economy field (CGM) as well as social partners European and national and level (ETUC, CEEP, UIL, CGIL, CISL) and a transnational partnership including public bodies (the Spanish Institute for Women, the Italian department of Equal Opportunities) and private organisations (the WLB HUB consultancy company, REFORM, the association of Norwegian Fathers promoting gender Equality). The presence of Giacomo Brodolini Foundation, a research centre with sound scientific background and over 20 years of experiences in implementing studies and transnational projects in the field of employment, gender equality and anti-discrimination strategies, grants the possibility to apply a rigorous scientific approach in designing and implementing testing activity.

The consortium plans to ensure the sustainability of the action via a combination of the following elements

- a solid partnership – applicant + co-applicants – involving the most relevant stakeholders at national level to support the permanent adoption of EQ&WL toolkit for work life balance strategies promotion
- an extended associated partnership (see point 3.2) actively involved in disseminating project outputs and supporting EQ&WL promotion of a cultural shift towards a more gendered balanced view on work life balance

- a sound scientific methodology for assessing the piloting phase (see 3.1.2), allowing to assess merits and need to improvement of the toolkit and suitable to support up-scaling processes
- a detailed communication and dissemination strategy at national and European level (see point 3.1.5)

No subcontracting in foreseen for project implementation



ANNEX II — GENERAL CONDITIONS

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PART A — LEGAL AND ADMINISTRATIVE PROVISIONS

ARTICLE II.1 — DEFINITIONS

The following definitions apply for the purpose of the Agreement:

‘Action’: the set of activities or the project for which the grant is awarded, to be implemented by the beneficiaries as described in Annex I.

‘Confidential information or document’: any information or document (in any format) received by either party from the other or accessed by either party in the context of the implementation of the Agreement that any of the parties has identified in writing as confidential. It does not include information that is publicly available.

‘Conflict of interests’: a situation where the impartial and objective implementation of the Agreement by a beneficiary is compromised for reasons involving family, emotional life, political or national affinity, economic interest, or any other shared interest with the Commission or any third party related to the subject matter of the Agreement.

‘Direct costs’: those specific costs which are directly linked to the implementation of the action and can therefore be attributed directly to it. They may not include any indirect costs;

‘Force majeure’: any unforeseeable, exceptional situation or event beyond the control of the parties that prevents either of them from fulfilling any of their obligations under the Agreement, which is not attributable to error or negligence on their part or on the part of the subcontractors, affiliated entities or third parties in receipt of financial support and which proves to be inevitable despite their exercising due diligence. The following cannot be invoked as *force majeure*: labour disputes, strikes, financial difficulties or any default of a service, defect in equipment or materials or delays in making them available, unless they stem directly from a relevant case of *force majeure*;

‘Formal notification’: form of communication between the parties made in writing by mail or electronic mail which provides the sender with compelling evidence that the message was delivered to the specified recipient;

‘Fraud’: any intentional act or omission affecting the Union’s financial interests relating to the use or presentation of false, incorrect or incomplete statements or documents, to non-disclosure of information in violation of a specific obligation;

‘Implementation period’: the period of implementation of the activities forming part of the action, as specified in Article I.2.2;

‘Indirect costs’: those costs which are not specific costs directly linked to the implementation of the action and which therefore cannot be attributed directly to it. They may not include any costs identifiable or declared as eligible direct costs;

‘Irregularity’: any infringement of a provision of Union law resulting from an act or omission by a beneficiary, which has or would have the effect of prejudicing the Union’s budget;

‘Maximum amount of the grant’: the maximum EU contribution to the action, as defined in Article I.3.1;

‘Pre-existing material’: any materials, document, technology or know-how which exists prior to the beneficiary using it for the production of a result in the implementation of the action;

‘Pre-existing right’: any industrial and intellectual property right on pre-existing material; it may consist in a right of ownership, a licence right and/or a right of use belonging to the beneficiary or any other third parties;

‘Related person’: any person who has the power to represent the beneficiary or to take decisions on its behalf;

‘Starting date’: the date on which the implementation of the action starts as provided for in Article I.2.2;

‘Subcontract’: a procurement contract within the meaning of Article II.10, which covers the implementation by a third party of tasks forming part of the action as described in Annex I;

‘Substantial error’: any infringement of a provision of an agreement resulting from an act or omission, which causes or might cause a loss to the Union’s budget.

ARTICLE II.2 — GENERAL OBLIGATIONS AND ROLES OF THE BENEFICIARIES

II.2.1 General obligations and role of the beneficiaries

The beneficiaries:

- (a) are jointly and severally liable for carrying out the *action* in accordance with the Agreement. If a beneficiary fails to implement its part of the *action*, the other beneficiaries become responsible for implementing this part (but without increasing the *maximum amount of the grant*);
- (b) must comply jointly or individually with any legal obligations they are bound by under applicable EU, international and national law;
- (c) must make appropriate internal arrangements to implement the *action* properly. The arrangements must be consistent with the terms of the Agreement. If provided for in the Special Conditions, those arrangements must take the form of an internal cooperation agreement between the beneficiaries.

II.2.2 General obligations and role of each beneficiary

Each beneficiary must:

- (a) inform the coordinator immediately of any events or circumstances of which the beneficiary is aware, that are likely to affect or delay the implementation of the *action*;
- (b) inform the coordinator immediately:

- (i) of any change in its legal, financial, technical, organisational or ownership situation and of any change in its name, address or legal representative;
 - (ii) of any change in the legal, financial, technical, organisational or ownership situation of its affiliated entities and of any change in their name, address or legal representative;
- (c) submit in due time to the coordinator:
- (i) the data needed to draw up the reports, financial statements and other documents provided for in the Agreement;
 - (ii) all the necessary documents required for audits, checks or evaluations as provided for in Article II.27.
 - (iii) any other information to be provided to the Commission under the Agreement, except if the Agreement requires such information to be submitted directly by the beneficiary.

II.2.3 General obligations and role of the coordinator

The coordinator:

- (a) must monitor the implementation of the *action* in order to make sure that the *action* is implemented in accordance with the terms of the Agreement;
- (b) is the intermediary for all communications between the beneficiaries and the Commission, except if provided otherwise in the Agreement. In particular, the coordinator:
 - (i) must immediately inform the Commission:
 - of any change in the name, address, legal representative of any of the beneficiaries or of their affiliated entities;
 - of any change in the legal, financial, technical, organisational or ownership situation of any of the beneficiaries or of their affiliated entities;
 - of any events or circumstances of which the coordinator is aware, that are likely to affect or delay the implementation of the *action*.
 - (ii) is responsible for supplying the Commission with all documents and information required under the Agreement, except if provided otherwise in the Agreement itself. If information is required from the other beneficiaries, the coordinator is responsible for obtaining and verifying this information before passing it on to the Commission;
- (c) must make the appropriate arrangements for providing any financial guarantees required under the Agreement;
- (d) must draw up the requests for payment in accordance with the Agreement;

- (e) if it is designated as the sole recipient of payments on behalf of all of the beneficiaries, it must ensure that all the appropriate payments are made to the other beneficiaries without unjustified delay;
- (f) is responsible for providing all the necessary documents required for checks and audits initiated before the payment of the balance or documents required for evaluation as provided for in Article II.27.

The coordinator may not subcontract any part of its tasks to the other beneficiaries or to any other party.

ARTICLE II.3 — COMMUNICATION BETWEEN THE PARTIES

II.3.1 Form and means of communication

Any communication relating to the Agreement or to its implementation must:

- (a) be made in writing (in paper or electronic form);
- (b) bear the number of the Agreement; and
- (c) be made using the communication details identified in Article I.7.

If a party requests written confirmation of an electronic communication within a reasonable time, the sender must provide an original signed paper version of the communication as soon as possible.

II.3.2 Date of communications

Any communication is considered to have been made when the receiving party receives it, unless the Agreement states that communication is considered to have been made on the date when the communication was sent.

Email is considered to have been received by the receiving party on the day of dispatch of that email, provided that it is sent to the email address indicated in Article I.7. The sending party must be able to prove the date of dispatch. If the sending party receives a non-delivery report, it must make every effort to ensure that the other party actually receives the communication by email or mail. In such a case, the sending party is not held in breach of its obligation to send such communication within a specified deadline.

Mail sent to the Commission using the postal or courier services is considered to have been received by the Commission on the date on which it is registered by the department identified in Article I.7.2.

Formal notifications are considered to have been received by the receiving party on the date of receipt indicated in the proof received by the sending party that the message was delivered to the specified recipient.

ARTICLE II.4 — LIABILITY FOR DAMAGES

II.4.1 The Commission may not be held liable for any damage caused or sustained by any of the beneficiaries, including any damage caused to third parties as a consequence of or during the implementation of the *action*.

II.4.2 Except in cases of *force majeure*, the beneficiaries must compensate the Commission 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.

ARTICLE II.5 — CONFLICT OF INTERESTS

II.5.1 The beneficiaries must take all necessary measures to prevent any situation of *conflict of interests*.

II.5.2 The beneficiaries must inform the Commission without delay of any situation constituting or likely to lead to a *conflict of interests*. They must take immediately all the necessary steps to rectify this situation.

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

ARTICLE II.6 — CONFIDENTIALITY

II.6.1 During implementation of the *action* and for five years after the payment of the balance, the parties must treat with confidentiality any *confidential information and documents*.

II.6.2 The parties may only use *confidential information and documents* for a reason other than to fulfil their obligations under the Agreement if they have first obtained the prior written agreement of the other party.

II.6.3 The confidentiality obligations do not apply if:

- (a) the disclosing party agrees to release the other party from those obligations;
- (b) the *confidential information or documents* become public through other means than a breach of the confidentiality obligations;
- (c) the disclosure of the *confidential information or documents* is required by law.

ARTICLE II.7 — PROCESSING OF PERSONAL DATA

II.7.1 Processing of personal data by the Commission

Any personal data included in the Agreement must be processed by the Commission in accordance with Regulation (EC) No 45/2001.¹

Such data must be processed by the data controller identified in Article I.7.1 solely for implementing, managing and monitoring the Agreement or to protect the financial interests of the EU, including checks, audits and investigations in accordance with Article II.27.

¹ Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data.

The beneficiaries have the right to access and correct their own personal data. For this purpose, they must send any queries about the processing of their personal data to the data controller identified in Article I.7.1.

The beneficiaries may have recourse at any time to the European Data Protection Supervisor.

II.7.2 Processing of personal data by the beneficiaries

The beneficiaries must process personal data under the Agreement in compliance with applicable EU and national law on data protection (including authorisations or notification requirements).

The beneficiaries may grant their personnel access only to data that is strictly necessary for implementing, managing and monitoring the Agreement.

The beneficiaries must adopt appropriate technical and organisational security measures having regard to the risks inherent in the processing and to the nature of the personal data concerned. This is in order to:

- (a) prevent any unauthorised person from gaining access to computer systems processing personal data, and especially:
 - (i) unauthorised reading, copying, alteration or removal of storage media;
 - (ii) unauthorised data input as well as any unauthorised disclosure, alteration or erasure of stored personal data;
 - (iii) unauthorised use of data processing systems by means of data transmission facilities;
- (b) ensure that authorised users of a data processing system can access only the personal data to which their access right refers;
- (c) record which personal data have been communicated, when and to whom;
- (d) ensure that personal data processed on behalf of third parties can be processed only in the manner prescribed by the Commission;
- (e) ensure that, during communication of personal data and transport of storage media, the data cannot be read, copied or erased without authorisation;
- (f) design their organisational structure in such a way that it meets data protection requirements.

ARTICLE II.8 — VISIBILITY OF UNION FUNDING

II.8.1 Information on Union funding and use of the European Union emblem

Unless the Commission requests or agrees otherwise, any communication or publication made by the beneficiaries jointly or individually that relates to the *action*, including at conferences, seminars or in any information or promotional materials (such as brochures, leaflets, posters, presentations, in electronic form, etc.), must:

- (a) indicate that the *action* has received funding from the Union; and
- (b) display the European Union emblem.

When displayed in association with another logo, the European Union emblem must have appropriate prominence.

The obligation to display the European Union emblem does not confer on the beneficiaries a right of exclusive use. The beneficiaries may not appropriate the European Union emblem or any similar trademark or logo, either by registration or by any other means.

For the purposes of the first, second and third subparagraphs and under the conditions specified therein, the beneficiaries may use the European Union emblem without first obtaining permission from the Commission.

II.8.2 Disclaimers excluding Commission responsibility

Any communication or publication that relates to the *action*, made by the beneficiaries jointly or individually in any form and using any means, must indicate:

- (a) that it reflects only the author's view; and
- (b) that the Commission is not responsible for any use that may be made of the information it contains.

ARTICLE II.9 — PRE-EXISTING RIGHTS AND OWNERSHIP AND USE OF THE RESULTS (INCLUDING INTELLECTUAL AND INDUSTRIAL PROPERTY RIGHTS)

II.9.1 Ownership of the results by the beneficiaries

The beneficiaries retain ownership of the results of the *action*, including industrial and intellectual property rights, and of the reports and other documents relating to it, unless stipulated otherwise in the Agreement.

II.9.2 Pre-existing rights

If the Commission sends the beneficiaries a written request specifying which of the results it intends to use, the beneficiaries must:

- (a) establish a list specifying all *pre-existing rights* included in those results; and
- (b) provide this list to the Commission at the latest with the request for payment of the balance.

The beneficiaries must ensure that they or their affiliated entities have all the rights to use any *pre-existing rights* during the implementation of the Agreement.

II.9.3 Rights of use of the results and of pre-existing rights by the Union

The beneficiaries grant the Union the following rights to use the results of the *action*:

- (a) for its own purposes and in particular to make available to persons working for the Commission, other Union institutions, agencies and bodies and to Member States' institutions, as well as to copy and reproduce in whole or in part and in an unlimited number of copies;

- (b) reproduction: the right to authorise direct or indirect, temporary or permanent reproduction of the results by any means (mechanical, digital or other) and in any form, in whole or in part;
- (c) communication to the public: the right to authorise any display performance or communication to the public, by wire or wireless means, including making the results available to the public in such a way that members of the public may access them from a place and at a time individually chosen by them; this right also includes communication and broadcasting by cable or by satellite;
- (d) distribution: the right to authorise any form of distribution of results or copies of the results to the public;
- (e) adaptation: the right to modify the results;
- (f) translation;
- (g) the right to store and archive the results in line with the document management rules applicable to the Commission, including digitisation or converting the format for preservation or new use purposes;
- (h) where the results are documents, the right to authorise the reuse of the documents in conformity with Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents if that Decision is applicable and if the documents fall within its scope and are not excluded by any of its provisions. For the sake of this provision, the terms 'reuse' and 'document' have the meanings given to them by Decision 2011/833/EU.

The above rights of use may be further specified in the Special Conditions.

Additional rights of use for the Union may be provided for in the Special Conditions.

The beneficiaries must ensure that the Union has the right to use any *pre-existing rights* included in the results of the *action*. The *pre-existing rights* must be used for the same purposes and under the same conditions as applicable to the rights of use of the results of the *action*, unless specified otherwise in the Special Conditions.

Information about the copyright owner must be inserted in cases where the result is divulged by the Union. The copyright information must read: '© — year — name of the copyright owner. All rights reserved. Licenced to the European Union under conditions.'

If the beneficiaries grant rights of use to the Commission, this does not affect its confidentiality obligations under Article II.6 or the beneficiaries' obligations under Article II.2.1.

ARTICLE II.10 — AWARD OF CONTRACTS NECESSARY FOR THE IMPLEMENTATION OF THE ACTION

II.10.1 If the implementation of the *action* requires the beneficiaries to procure goods, works or services, they must award the contract to the tender offering best value for money

or, as appropriate, to the tender offering the lowest price. In doing so, they must avoid any *conflict of interests*.

The beneficiaries must ensure that the Commission, the European Court of Auditors and the European Anti-Fraud Office (OLAF) can exercise their rights under Article II.27 also towards the beneficiaries' contractors.

II.10.2 Beneficiaries that are 'contracting authorities' within the meaning of Directive 2014/24/EU² or 'contracting entities' within the meaning of Directive 2014/25/EU³ must comply with the applicable national public procurement rules.

The beneficiaries must ensure that the conditions applicable to them under Articles II.4, II.5, II.6 and II.9 are also applicable to the contractors.

II.10.3 The beneficiaries remain solely responsible for carrying out the *action* and for compliance with the Agreement.

II.10.4 If the beneficiaries breach their obligations under Article II.10.1 the costs related to the contract concerned are considered ineligible in accordance with Article II.19.2 (c), (d) and (e).

If the beneficiaries breach their obligations under Article II.10.2 the grant may be reduced in accordance with Article II.25.4.

ARTICLE II.11 — SUBCONTRACTING OF TASKS FORMING PART OF THE ACTION

II.11.1 Beneficiaries may subcontract tasks forming part of the *action*. If they do so, they must ensure that, in addition to the conditions specified in Article II.10, the following conditions are also complied with:

- (a) subcontracting does not cover core tasks of the *action*;
- (b) recourse to subcontracting is justified because of the nature of the *action* and what is necessary for its implementation;
- (c) the estimated costs of the subcontracting are clearly identifiable in the estimated budget set out in Annex III;
- (d) any recourse to subcontracting, if not provided for in Annex I, is communicated by the coordinator and approved by the Commission. The Commission may grant approval:

(i) before any recourse to subcontracting, if the beneficiaries request an amendment as provided for in Article II.13; or

(ii) after recourse to subcontracting if the subcontracting:

² Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC

³ Directive 2014/25/EU of the European Parliament and of the Council of 26 February 2014 on procurement by entities operating in the water, energy, transport and postal services sectors and repealing Directive 2004/17/EC

- is specifically justified in the interim or final technical report referred to in Articles I.4.3 and I.4.4; and

- does not entail changes to the Agreement which would call into question the decision awarding the grant or be contrary to the equal treatment of applicants;

(e) the beneficiaries ensure that the conditions applicable to them under Article II.8 are also applicable to the subcontractors.

II.11.2 If the beneficiaries breach their obligations under Article II.11.1 (a), (b), (c) or (d), the costs related to the contract concerned are considered ineligible in accordance with Article II.19.2 (f).

If the beneficiaries breach their obligation under Article II.11.1 (e) the grant may be reduced in accordance with Article II.25.4.

ARTICLE II.12 — FINANCIAL SUPPORT TO THIRD PARTIES

II.12.1 If, while implementing the *action*, the beneficiaries have to give financial support to third parties, the beneficiaries must give such financial support in accordance with the conditions specified in Annex I. Under those conditions, the following information must be stated at least:

- (a) the maximum amount of financial support. This amount may not exceed EUR 60 000 for each third party except if the financial support is the primary aim of the *action* as specified in Annex I;
- (b) the criteria for determining the exact amount of the financial support;
- (c) the different types of activity that may receive financial support, on the basis of a fixed list;
- (d) the persons or categories of persons which may receive financial support;
- (e) the criteria for giving the financial support.

II.12.2 As an exception to Article II.12.1, if the financial support takes the form of a prize, the beneficiaries must give such financial support in accordance with the conditions specified in Annex I. Under those conditions, the following information must at least be stated:

- (a) the conditions for participation;
- (b) the award criteria;
- (c) the amount of the prize;
- (d) the payment arrangements.

II.12.3 The beneficiaries must ensure that the conditions applicable to them under Articles II.4, II.5, II.6, II.8, II.9 and II.27 are also applicable to the third parties receiving financial support.

ARTICLE II.13 — AMENDMENTS TO THE AGREEMENT

II.13.1 Any amendment to the Agreement must be made in writing.

II.13.2 An amendment may not have the purpose or the effect of making changes to the Agreement which would call into question the decision awarding the grant or be contrary to the equal treatment of applicants.

II.13.3 Any request for amendment must:

- (a) be duly justified;
- (b) be accompanied by appropriate supporting documents; and
- (c) be sent to the other party in due time before it is due to take effect, and in any case one month before the end of the *implementation period*.

Point (c) does not apply in cases duly substantiated by the party requesting the amendment if the other party agrees.

II.13.4 A request for amendment on behalf of the beneficiaries must be submitted by the coordinator. If a change of coordinator is requested without its agreement, the request must be submitted by all other beneficiaries and must be accompanied by the opinion of the coordinator or proof that this opinion has been requested in writing.

II.13.5 Amendments enter into force on the date on which the last party signs or on the date of approval of the request for amendment.

Amendments take effect on a date agreed by the parties or, in the absence of such an agreed date, on the date on which the amendment enters into force.

ARTICLE II.14 — ASSIGNMENT OF CLAIMS FOR PAYMENTS TO THIRD PARTIES

II.14.1 The beneficiaries may not assign any of their claims for payment against the Commission to any third party, except if approved by the Commission on the basis of a reasoned, written request by the coordinator made on behalf of the beneficiaries.

If the Commission does not accept the assignment or the terms of it are not complied with, the assignment has no effect on it.

II.14.2 In no circumstances may an assignment release the beneficiaries from their obligations towards the Commission.

ARTICLE II.15 — *FORCE MAJEURE*

II.15.1 A party faced with *force majeure* must send a *formal notification* to the other party without delay, stating the nature of the situation or of the event, its likely duration and foreseeable effects.

II.15.2 The parties must take the necessary measures to limit any damage due to *force majeure*. They must do their best to resume the implementation of the *action* as soon as possible.

II.15.3 The party faced with *force majeure* may not be considered in breach of its obligations under the Agreement if it has been prevented from fulfilling them by *force majeure*.

ARTICLE II.16 — SUSPENSION OF THE IMPLEMENTATION OF THE ACTION

II.16.1 Suspension of implementation by the beneficiaries

The coordinator, on behalf of the beneficiaries, may suspend the implementation of the *action* or any part of it, if exceptional circumstances make such implementation impossible or excessively difficult, in particular in the event of *force majeure*.

The coordinator must immediately inform the Commission, stating:

- (a) the reasons for suspension, including details about the date or period when the exceptional circumstances occurred; and
- (b) the expected date of resumption.

Once the circumstances allow the beneficiaries to resume implementing the *action*, the coordinator must inform the Commission immediately and present a request for amendment of the Agreement as provided for in Article II.16.3. This obligation does not apply if the Agreement or the participation of a beneficiary is terminated in accordance with Articles II.17.1, II.17.2 or points (c) or (d) of Article II.17.3.1.

II.16.2 Suspension of implementation by the Commission

II.16.2.1 Grounds for suspension

The Commission may suspend the implementation of the *action* or any part thereof:

- (a) if the Commission has evidence that a beneficiary has committed *substantial errors, irregularities* or *fraud* in the award procedure or while implementing the Agreement or if a beneficiary fails to comply with its obligations under the Agreement;
- (b) if the Commission has evidence that a beneficiary has committed systemic or recurrent errors, *irregularities, fraud* or serious breach of obligations in other grants funded by the Union or the European Atomic Energy Community ('Euratom') awarded to the beneficiary under similar conditions and the errors, *irregularities, fraud* or breach have a material impact on this grant; or
- (c) if the Commission suspects *substantial errors, irregularities, fraud* or breach of obligations committed by a beneficiary in the award procedure or while implementing the Agreement and needs to verify whether they have actually occurred.

II.16.2.2 Procedure for suspension

Step 1 — Before suspending implementation of the *action*, the Commission must send a *formal notification* to the coordinator:

- (a) informing it of:
 - (i) its intention to suspend the implementation;
 - (ii) the reasons for suspension;

- (iii) the necessary conditions for resuming the implementation in the cases referred to in points (a) and (b) of Article II.16.2.1; and
- (b) inviting it to submit observations within 30 calendar days of receiving the formal notification.

Step 2 — If the Commission does not receive observations or decides to pursue the procedure despite the observations it has received, it must send a *formal notification* to the coordinator informing it of:

- (a) the suspension of the implementation;
- (b) the reasons for suspension; and
- (c) the final conditions for resuming the implementation in the cases referred to in points (a) and (b) of Article II.16.2.1; or
- (d) the indicative date of completion of the necessary verification in the case referred to in point (c) of Article II.16.2.1.

The coordinator must immediately inform the other beneficiaries of the suspension. The suspension takes effect five calendar days after the *formal notification* is received by the coordinator or on a later date specified in the *formal notification*.

Otherwise, the Commission must send a *formal notification* to the coordinator informing it that it is not continuing the suspension procedure.

II.16.2.3 Resuming implementation

In order to resume the implementation, the beneficiaries must meet the notified conditions as soon as possible and must inform the Commission of any progress made.

If the conditions for resuming the implementation are met or the necessary verifications are carried out, the Commission must send a *formal notification* to the coordinator:

- (a) informing it that the conditions for lifting the suspension are met; and
- (b) requiring it to present a request for amendment of the Agreement as provided for in Article II.16.3. This obligation does not apply if the Agreement or the participation of a beneficiary is terminated in accordance with Articles II.17.1, II.17.2 or points (c), (g) or (h) of Article II.17.3.1.

II.16.3 Effects of the suspension

If the implementation of the *action* can be resumed and the Agreement has not been terminated, an amendment to the Agreement must be made in accordance with Article II.13 in order to:

- (a) set the date on which the *action* is to be resumed;
- (b) extend the duration of the *action*; and
- (c) make other changes necessary to adapt the *action* to the new situation.

The suspension is lifted with effect from the resumption date set out in the amendment. This date may be before the date on which the amendment enters into force.

Costs incurred during the period of suspension that relate to the implementation of the suspended *action* or the suspended part of it may not be reimbursed or covered by the grant.

Suspending implementation of the *action* does not affect the Commission's right to terminate the Agreement or to terminate the participation of a beneficiary in accordance with Article II.17.3, reduce the grant or recover amounts unduly paid in accordance with Articles II.25.4 and II.26.

Neither party may claim damages due to suspension by the other party.

ARTICLE II.17 — TERMINATION OF THE AGREEMENT

II.17.1 Termination of the Agreement by the coordinator

The beneficiaries may terminate the Agreement.

The coordinator must send a *formal notification* of termination to the Commission, stating:

- (a) the reasons for termination; and
- (b) the date on which the termination takes effect. This date must be set after the *formal notification*.

If the coordinator does not state the reasons for the termination or if the Commission considers that the reasons do not justify termination, the Agreement is considered to have been terminated improperly.

The termination takes effect on the day specified in the *formal notification*.

II.17.2 Termination of the participation of one or more beneficiaries by the coordinator

The participation of one or more beneficiaries may be terminated by the coordinator at the request of the beneficiary concerned or on behalf of the other beneficiaries.

The coordinator must send a *formal notification* of termination to the Commission and inform the beneficiary concerned by termination.

If the coordinator's participation is terminated without its agreement, the *formal notification* must be submitted by another beneficiary (acting on behalf of the other beneficiaries).

The *formal notification* must include:

- (a) the reasons for termination;
- (b) the opinion of the beneficiary concerned by termination (or proof that this opinion has been requested in writing);
- (c) the date on which the termination takes effect. This date must be set after the *formal notification*; and
- (d) a request for amendment as provided for in Article II.17.4.2(a).

If the coordinator or beneficiary does not state the reasons for the termination or if the Commission considers that the reasons do not justify termination, the participation will be considered to have been terminated improperly.

The termination takes effect on the day specified in the *formal notification*.

II.17.3 Termination of the Agreement or the participation of one or more beneficiaries by the Commission

II.17.3.1 Grounds for termination

The Commission may terminate the Agreement, or the participation of any one or several beneficiaries, if:

- (a) a change to the beneficiary's legal, financial, technical, organisational or ownership situation is likely to affect the implementation of the Agreement substantially or calls into question the decision to award the grant;
- (b) following the termination of the participation of any one or several beneficiaries, the necessary modifications to the Agreement would call into question the decision awarding the grant or would result in unequal treatment of applicants;
- (c) the beneficiaries do not implement the *action* as described in Annex I or a beneficiary fails to comply with another substantial obligation incumbent on it under the Agreement;
- (d) the implementation of the *action* is prevented or suspended due to *force majeure* or exceptional circumstances and either:
 - (i) resumption is impossible; or
 - (ii) the necessary changes to the Agreement would call into question the decision awarding the grant or be contrary to the equal treatment of applicants;
- (e) a beneficiary or any person that assumes unlimited liability for the debts of that beneficiary comes under any of the situations provided for in points (a) or (b) of Article 106 (1) of the Financial Regulation;⁴
- (f) a beneficiary or any *related person* comes under any of the situations provided for in points (c), (d), (e) or (f) of Article 106 (1) or comes under Article 106 (2) of the Financial Regulation;
- (g) the Commission has evidence that a beneficiary or any *related person* has committed *substantial errors, irregularities* or *fraud* in the award procedure or while implementing the Agreement, including if that beneficiary or *related person* has submitted false information or failed to provide required information;
- (h) the Commission has evidence that a beneficiary has committed systemic or recurrent errors, *irregularities, fraud* or serious breach of obligations in other Union or Euratom grants awarded to it under similar conditions and such errors, *irregularities, fraud* or breach have a material impact on this grant; or
- (i) the Commission has sent a beneficiary, through the coordinator, a *formal notification* asking it to end the participation of its affiliated entity because that entity is in a

⁴ Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union.

situation provided for in points (f), (g) or (h) and that beneficiary has failed to request an amendment ending the participation of the entity and reallocating its tasks.

II.17.3.2 Procedure for termination

Step 1 — Before terminating the Agreement or participation of one or more beneficiaries, the Commission must send a *formal notification* to the coordinator:

- (a) informing it of:
 - (i) its intention to terminate;
 - (ii) the reasons for termination; and
- (b) requiring it, within 45 calendar days of receiving the formal notification, :
 - (i) to submit observations on behalf of all beneficiaries; and
 - (ii) in the case of point (c) of Article II.17.3.1, to inform the Commission of the measures to ensure compliance with the obligations under the Agreement.

Step 2 — If the Commission does not receive observations or decides to pursue the procedure despite the observations it has received, it will send a *formal notification* to the coordinator informing it of the termination and the date on which it takes effect. The coordinator must immediately inform the other beneficiaries of the termination.

Otherwise, the Commission must send a *formal notification* to the coordinator informing it that the termination procedure is not continued.

The termination takes effect:

- (a) for terminations under points (a), (b), (c) and (e) of Article II.17.3.1: on the day specified in the *formal notification* of termination referred to in the second subparagraph (i.e. in Step 2 above);
- (b) for terminations under points (d), (f), (g), (h) and (i) of Article II.17.3.1: on the day after the coordinator receives the *formal notification* of termination referred to in the second subparagraph (i.e. in Step 2 above).

II.17.4 Effects of termination

II.17.4.1 Effects of terminating the Agreement:

Within 60 calendar days from the day on which the termination takes effect, the coordinator must submit a request for payment of the balance as provided for in Article I.4.4.

If the Commission does not receive the request for payment of the balance by the above deadline, only costs which are included in an approved technical report and, where relevant, in an approved financial statement, are reimbursed or covered by the grant.

If the Agreement is terminated by the Commission because the coordinator has breached its obligation to submit the request for payment, the coordinator may not submit any request for payment after termination. In that case the second subparagraph applies.

The Commission calculates the final grant amount as referred to in Article II.25 and the balance as referred to in Article I.5.4 on the basis of the reports submitted. Only costs incurred before termination takes effect are reimbursed or covered by the grant. Costs relating to contracts due for execution only after termination are not taken into account are not reimbursed or covered by the grant.

The Commission may reduce the grant in accordance with Article II.25.4 in case of:

- (a) improper termination of the Agreement by the coordinator within the meaning of Article II.17.1; or
- (b) termination of the Agreement by the Commission on any of the grounds set out in points (c), (f), (g), (h) and (i) of Article II.17.3.1.

Neither party may claim damages on the grounds that the other party terminated the Agreement.

After termination, the beneficiaries' obligations continue to apply, in particular those under Articles I.4, II.6, II.8, II.9, II.14, II.27 and any additional provisions on the use of the results, as set out in the Special Conditions.

II.17.4.2 Effects of terminating the participation of one or more beneficiaries:

- a) The coordinator must submit a request for amendment including:
 - (i) a proposal to reallocate the tasks of the beneficiary or beneficiaries concerned by the termination; and
 - (ii) if necessary, the addition of one or more new beneficiaries to succeed the beneficiary or beneficiaries concerned in all their rights and obligations under the Agreement.

If the Commission terminates the participation of a beneficiary, the coordinator must submit the request for amendment within 60 calendar days from the day on which the termination takes effect.

If the coordinator terminates the participation of a beneficiary, the request for amendment must be included in the *formal notification* of termination referred to in Article II.17.2.

If termination takes effect after the end of the *implementation period*, no request for amendment must be provided unless the beneficiary concerned is the coordinator. In this case, the request for amendment must propose a new coordinator.

If the request for amendment is rejected by the Commission, the Agreement may be terminated in accordance with Article II.17.3.1 (b). The request for amendment may be rejected if it calls into question the decision awarding the grant or is contrary to the equal treatment of applicants.

- b) The beneficiary concerned by termination must submit to the coordinator:
 - (i) a technical report; and
 - (ii) a financial statement covering the period from the end of the last reporting period to the date when termination takes effect.

The coordinator must include this information in the payment request for the next reporting period.

Only costs incurred by the beneficiary concerned before termination takes effect are reimbursed or covered by the grant. Costs relating to contracts due for execution only after termination are not reimbursed or covered by the grant.

The Commission may reduce the grant in accordance with Article II.25.4. in case of:

- (a) improper termination of the participation of a beneficiary by the coordinator within the meaning of Article II.17.2 or
- (b) termination of the participation of a beneficiary by the Commission on any of the grounds set out in points (c), (f), (g), (h) or (i) of Article II.17.3.1.

Neither party may claim damages on the grounds that the other party terminated the participation of a beneficiary.

After termination, the concerned beneficiary's obligations continue to apply, in particular those under Articles I.4, II.6, II.8, II.9, II.14, II.27 and any additional provisions on the use of the results, as set out in the Special Conditions.

ARTICLE II.18 — APPLICABLE LAW, SETTLEMENT OF DISPUTES AND ENFORCEABLE DECISIONS

II.18.1 The Agreement is governed by the applicable Union law, complemented, where necessary, by the law of Belgium.

II.18.2 In accordance with Article 272 TFEU, the General Court or, on appeal, the Court of Justice of the European Union, has sole jurisdiction to hear any dispute between the Union and any beneficiary concerning the interpretation, application or validity of the Agreement, if such dispute cannot be settled amicably.

II.18.3 In accordance with Article 299 TFEU, for the purposes of recovery within the meaning of Article II.26, the Commission may adopt an enforceable decision to impose pecuniary obligations on persons other than States.

An *action* may be brought against such decision before the General Court of the European Union in accordance with Article 263 TFEU.

PART B — FINANCIAL PROVISIONS

ARTICLE II.19 — ELIGIBLE COSTS

II.19.1 Conditions for the eligibility of costs

Eligible costs of the action are costs actually incurred by the beneficiary and which meet the following criteria:

- (a) they are incurred within the *implementation period*, with the exception of costs relating to the request for payment of the balance and the corresponding supporting documents referred to in Article I.4.4;
- (b) they are indicated in the estimated budget of the *action*. The estimated budget is set out in Annex III;
- (c) they are incurred in connection with the *action* as described in Annex I and are necessary for its implementation;
- (d) they are identifiable and verifiable, in particular they are recorded in the beneficiary's accounting records and determined according to the applicable accounting standards of the country where the beneficiary is established and according to the beneficiary's usual cost accounting practices;
- (e) they comply with the requirements of applicable tax and social legislation; and
- (f) they are reasonable, justified and comply with the principle of sound financial management, in particular regarding economy and efficiency.

II.19.2 Eligible direct costs

To be eligible, the *direct costs* of the *action* must comply with the eligibility conditions set out in Article II.19.1.

In particular, the following categories of costs are eligible *direct costs*, provided that they satisfy the eligibility conditions set out in Article II.19.1 as well as the following conditions:

- (a) the costs of personnel working under an employment contract with the beneficiary or an equivalent appointing act and assigned to the *action*, provided that these costs are in line with the beneficiary's usual policy on remuneration.

Those costs include actual salaries plus social security contributions and other statutory costs included in the remuneration. They may also comprise additional remunerations, including payments on the basis of supplementary contracts regardless of the nature of those contracts, provided that they are paid in a consistent manner whenever the same kind of work or expertise is required, independently from the source of funding used;

The costs of natural persons working under a contract with the beneficiary other than an employment contract or who are seconded to the beneficiary by a third party against payment may also be included under such personnel costs, provided that the following conditions are fulfilled:

- (i) the person works 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);

- (ii) the result of the work belongs to the beneficiary (unless exceptionally agreed otherwise); and
 - (iii) the costs are not significantly different from the costs of staff performing similar tasks under an employment contract with the beneficiary;
- (b) costs of travel and related subsistence allowances, provided that these costs are in line with the beneficiary's usual practices on travel;
- (c) the depreciation costs of equipment or other assets (new or second-hand) as recorded in the beneficiary's accounting statements, provided that the asset:
 - (i) is written off in accordance with the international accounting standards and the beneficiary's usual accounting practices; and
 - (ii) has been purchased in accordance with Article II.10.1 if the purchase occurred within the *implementation period*;

The costs of renting or leasing equipment or other assets are also eligible, provided that these costs do not exceed the depreciation costs of similar equipment or assets and are exclusive of any finance fee;

Only the portion of the equipment's depreciation, rental or lease costs corresponding to the *implementation period* and the rate of actual use for the purposes of the *action* may be taken into account when determining the eligible costs. By way of exception, the full cost of purchase of equipment may be eligible under the Special Conditions, if this is justified by the nature of the *action* and the context of the use of the equipment or assets;

- (d) costs of consumables and supplies, provided that they:
 - (i) are purchased in accordance with Article II.10.1; and
 - (ii) are directly assigned to the *action*;
- (e) costs arising directly from requirements imposed by the Agreement (dissemination of information, specific evaluation of the *action*, audits, translations, reproduction), including the costs of requested financial guarantees, provided that the corresponding services are purchased in accordance with Article II.10.1;
- (f) costs entailed by *subcontracts* within the meaning of Article II.11, provided that the conditions laid down in Article II.11.1 (a), (b), (c) and (d) are met;
- (g) costs of financial support to third parties within the meaning of Article II.12, provided that the conditions laid down in that Article are met;
- (h) duties, taxes and charges paid by the beneficiary, notably value added tax (VAT), provided that they are included in eligible *direct costs*, and unless specified otherwise in the Agreement.

II.19.3 Eligible indirect costs

To be eligible, *indirect costs* of the *action* must represent a fair apportionment of the overall overheads of the beneficiary and must comply with the conditions of eligibility set out in Article II.19.1.

Eligible *indirect costs* must be declared on the basis of a flat rate of 7% of the total eligible *direct costs* unless otherwise specified in Article I.3.2.

II.19.4 Ineligible costs

In addition to any other costs which do not fulfil the conditions set out in Article II.19.1, the following costs may not be considered eligible:

- (a) return on capital and dividends paid by a beneficiary;
- (b) debt and debt service charges;
- (c) provisions for losses or debts;
- (d) interest owed;
- (e) doubtful debts;
- (f) exchange losses;
- (g) costs of transfers from the Commission charged by the bank of a beneficiary;
- (h) costs declared by the beneficiary under another action receiving a grant financed from the Union budget. Such grants include grants awarded by a Member State and financed from the Union budget and grants awarded by bodies other than the Commission for the purpose of implementing the Union budget. In particular, beneficiaries receiving an operating grant financed by the EU or Euratom budget cannot declare indirect costs for the period(s) covered by the operating grant, unless they can demonstrate that the operating grant does not cover any costs of the action;
- (i) contributions in kind from third parties;
- (j) excessive or reckless expenditure;
- (k) deductible VAT.

ARTICLE II.20 — IDENTIFIABILITY AND VERIFIABILITY OF THE AMOUNTS DECLARED

II.20.1 Declaring costs and contributions

Each beneficiary must declare as eligible costs or as a requested contribution:

- (a) for actual costs: the costs it actually incurred for the *action*;
- (b) for unit costs or unit contributions: the amount obtained by multiplying the amount per unit specified in Article I.3.2(a)(ii) or (b) by the actual number of units used or produced;
- (c) for lump sum costs or lump sum contributions: the global amount specified in Article I.3.2(a)(iii) or (c), if the corresponding tasks or part of the *action* as described in Annex I have been implemented properly;
- (d) for flat-rate costs or flat-rate contributions: the amount obtained by applying the flat rate specified in Article I.3.2(a)(iv) or (d);
- (e) for unit costs declared on the basis of the beneficiary's usual cost accounting practices: the amount obtained by multiplying the amount per unit calculated in

- accordance with the beneficiary's usual cost accounting practices by the actual number of units used or produced;
- (f) for lump sum costs declared on the basis of the beneficiary's usual cost accounting practices: the global amount calculated in accordance with its usual cost accounting practices, if the corresponding tasks or part of the *action* have been implemented properly;
 - (g) for flat-rate costs declared on the basis of the beneficiary's usual cost accounting practices: the amount obtained by applying the flat rate calculated in accordance with the beneficiary's usual cost accounting practices.

II.20.2 Records and other documentation to support the costs and contributions declared

Each beneficiary must provide the following if requested to do so in the context of the checks or audits described in Article II.27:

- (a) for actual costs: adequate supporting documents to prove the costs declared, such as contracts, invoices and accounting records.

In addition, the beneficiary's usual accounting and internal control procedures must permit direct reconciliation of the amounts declared with the amounts recorded in its accounting statements and with the amounts indicated in the supporting documents;

- (b) for unit costs or unit contributions: adequate supporting documents to prove the number of units declared.

The beneficiary does not need to identify the actual eligible costs covered or to provide supporting documents, such as accounting statements, to prove the amount declared per unit;

- (c) for lump sum costs or lump sum contributions: adequate supporting documents to prove that the *action* has been properly implemented.

The beneficiary does not need to identify the actual eligible costs covered or to provide supporting documents, such as accounting statements, to prove the amount declared as a lump sum;

- (d) for flat-rate costs or flat-rate contributions: adequate supporting documents to prove the eligible costs or requested contribution to which the flat rate applies.

The beneficiary does not need to identify the actual eligible costs covered or to provide supporting documents, such as accounting statements, for the flat rate applied;

- (e) for unit costs declared on the basis of the beneficiary's usual cost accounting practices: adequate supporting documents to prove the number of units declared;
- (f) for lump sum costs declared on the basis of the beneficiary's usual cost accounting practices: adequate supporting documents to prove that the *action* has been properly implemented;
- (g) for flat-rate costs declared on the basis of the beneficiary's usual cost accounting practices: adequate supporting documents to prove the eligible costs to which the flat rate applies.

II.20.3 Conditions to determine the compliance of cost accounting practices

II.20.3.1 In the case of points (e), (f) and (g) of Article II.20.2, the beneficiary does not need to identify the actual eligible costs covered, but it must ensure that the cost accounting practices used for the purpose of declaring eligible costs are in compliance with the following conditions:

- (a) the cost accounting practices used constitute its usual cost accounting practices and are applied in a consistent manner, based on objective criteria independent from the source of funding;
- (b) the costs declared can be directly reconciled with the amounts recorded in its general accounts; and
- (c) the categories of costs used for the purpose of determining the costs declared are exclusive of any ineligible cost or costs covered by other forms of grant as provided for in Article I.3.2.

II.20.3.2 If the Special Conditions so provide, the beneficiary may submit to the Commission a request asking it to assess the compliance of its usual cost accounting practices. If required by the Special Conditions, the request must be accompanied by a certificate on the compliance of the cost accounting practices ('certificate on the compliance of the cost accounting practices').

The certificate on the compliance of the cost accounting practices must be:

- (a) produced by an approved auditor or, if the beneficiary is a public body, by a competent and independent public officer; and
- (b) drawn up in accordance with Annex VIII.

The certificate must certify that the beneficiary's cost accounting practices used for the purpose of declaring eligible costs comply with the conditions laid down in Article II.20.3.1 and with the additional conditions that may be laid down in the Special Conditions.

II.20.3.3 If the Commission has confirmed that the beneficiary's usual cost accounting practices are in compliance, costs declared in application of these practices may not be challenged *ex post*, if:

- (a) the practices actually used comply with those approved by the Commission; and
- (b) the beneficiary did not conceal any information for the purpose of the approval of its cost accounting practices.

ARTICLE II.21 — ELIGIBILITY OF COSTS OF ENTITIES AFFILIATED TO THE BENEFICIARIES

If the Special Conditions contain a provision on entities affiliated to the beneficiaries, costs incurred by such an entity are eligible, if:

- (a) they satisfy the same conditions under Articles II.19 and II.20 as apply to the beneficiary; and

- (b) the beneficiary to which the entity is affiliated ensures that the conditions applicable to the beneficiary under Articles II.4, II.5, II.6, II.8, II.10, II.11 and II.27 are also applicable to the entity.

ARTICLE II.22 — BUDGET TRANSFERS

Beneficiaries are allowed to adjust the estimated budget set out in Annex III by transfers between themselves and between the different budget categories, if the *action* is implemented as described in Annex I. This adjustment does not require an amendment of the Agreement as provided for in Article II.13.

However, the beneficiaries may not add costs relating to *subcontracts* not provided for in Annex I, unless such additional *subcontracts* are approved by the Commission in accordance with Article II.11.1(d).

As an exception to the first subparagraph, if beneficiaries want to change the value of the contribution to which each of them is entitled, as referred to in point (c) of the third subparagraph of II.26.3, the coordinator must request an amendment as provided for in Article II.13.

The first three subparagraphs do not apply to amounts which, as provided for in Article I.3.2(a)(iii) or (c), take the form of lump sums.

ARTICLE II.23 — NON-COMPLIANCE WITH THE REPORTING OBLIGATIONS

The Commission may terminate the Agreement as provided for in Article II.17.3.1(c) and may reduce the grant as provided for in Article II.25.4 if the coordinator:

- (a) did not submit a request for interim payment or payment of the balance accompanied by the documents referred to in Articles I.4.3 or I.4.4 within 60 calendar days following the end of the corresponding reporting period; and
- (b) still fails to submit such a request within further 60 calendar days following a written reminder sent by the Commission.

ARTICLE II.24 — SUSPENSION OF PAYMENTS AND TIME LIMIT FOR PAYMENT

II.24.1 Suspension of payments

II.24.1.1 Grounds for suspension

The Commission may at any moment suspend, in whole or in part, the pre-financing payment and interim payments for one or more beneficiaries or the payment of the balance for all beneficiaries:

- (a) if the Commission has evidence that a beneficiary has committed *substantial errors, irregularities* or *fraud* in the award procedure or while implementing the Agreement or if a beneficiary fails to comply with its obligations under the Agreement;
- (b) if the Commission has evidence that a beneficiary has committed systemic or recurrent errors, *irregularities, fraud* or serious breach of obligations in other grants funded by the Union or the European Atomic Energy Community ('Euratom') awarded to the

beneficiary under similar conditions and such errors, *irregularities*, *fraud* or breach have a material impact on this grant; or

- (c) if the Commission suspects *substantial errors*, *irregularities*, *fraud* or breach of obligations committed by a beneficiary in the award procedure or while implementing the Agreement and needs to verify whether they have actually occurred.

II.24.1.2 Procedure for suspension

Step 1 — Before suspending payments, the Commission must send a *formal notification* to the coordinator:

- (a) informing it of:
 - (i) its intention to suspend payments;
 - (ii) the reasons for suspension;
 - (iii) in the cases referred to in points (a) and (b) of Article II.24.1.1, the conditions that need to be met for payments to resume; and
- (b) inviting it to submit observations within 30 calendar days of receiving the *formal notification*.

Step 2 — If the Commission does not receive observations or decides to pursue the procedure despite the observations it has received, it must send a *formal notification* to the coordinator informing it of:

- (a) the suspension of payments;
- (b) the reasons for suspension;
- (c) the final conditions under which payments may resume in the cases referred to in points (a) and (b) of Article II.24.1.1;
- (d) the indicative date of completion of the necessary verification in the case referred to in point (c) of Article II.24.1.1.

The coordinator must immediately inform the other beneficiaries of the suspension. The suspension takes effect on the day the Commission sends *formal notification* of suspension (Step 2).

Otherwise, the Commission must send a *formal notification* to the coordinator informing it that it is not continuing with the suspension procedure.

II.24.1.3 Effects of suspension

During the period of suspension of payments the coordinator is not entitled to submit:

- (a) any requests for payments and supporting documents referred to in Articles I.4.2, I.4.3 and I.4.4; or
- (b) where the suspension concerns the pre-financing payments or interim payments for one or several beneficiaries only, any requests for payments and supporting documents relating to the participation of the concerned beneficiary or beneficiaries in the *action*.

The corresponding requests for payments and supporting documents may be submitted as soon as possible after resumption of payments or may be included in the first request for

payment due following resumption of payments in accordance with the schedule laid down in Article I.4.1.

The suspension of payments does not affect the right of the coordinator to suspend the implementation of the *action* as provided for in Article II.16.1 or to terminate the Agreement or the participation of a beneficiary as provided for in Articles II.17.1 and II.17.2.

II.24.1.4 Resuming payments

In order for the Commission to resume payments, the beneficiaries must meet the notified conditions as soon as possible and must inform the Commission of any progress made.

If the conditions for resuming payments are met, the suspension will be lifted. The Commission will send a *formal notification* to the coordinator informing it of this.

II.24.2 Suspension of the time limit for payments

II.24.2.1 The Commission may at any moment suspend the time limit for payment specified in Articles I.5.2, I.5.3 and I.5.4 if a request for payment cannot be approved because:

- (a) it does not comply with the Agreement;
- (b) the appropriate supporting documents have not been produced; or
- (c) there is a doubt about the eligibility of the costs declared in the financial statements and additional checks, reviews, audits or investigations are necessary.

II.24.2.2 The Commission must send a *formal notification* to the coordinator informing it of:

- (a) the suspension; and
- (b) the reasons for the suspension.

The suspension takes effect on the day the Commission sends the *formal notification*.

II.24.2.3 If the conditions for suspending the payment deadline are no longer met, the suspension will be lifted and the remaining period will resume.

If the suspension exceeds two months, the coordinator may request the Commission if the suspension will continue.

If the payment deadline has been suspended because the technical reports or financial statements do not comply with the Agreement and the revised report or statement is not submitted or was submitted but is also rejected, the Commission may terminate the Agreement or the participation of the beneficiary as provided for in Article II.17.3.1(c) and reduce the grant as provided for in Article II.25.4.

ARTICLE II.25 — CALCULATION OF THE FINAL AMOUNT OF THE GRANT

The final amount of the grant depends on the extent to which the *action* has been implemented in accordance with the terms of the Agreement.

The final amount of the grant is calculated by the Commission at the time of the payment of the balance. The calculation involves the following steps:

Step 1 — Application of the reimbursement rate to the eligible costs and addition of the unit, flat-rate and lump sum contributions

Step 2 — Limit to the *maximum amount of the grant*

Step 3 — Reduction due to the no-profit rule

Step 4 — Reduction due to improper implementation or breach of other obligations.

II.25.1 Step 1 — Application of the reimbursement rate to the eligible costs and addition of the unit, flat-rate and lump sum contributions

This step is applied as follows:

- (a) If, as provided for in Article I.3.2(a), the grant takes the form of the reimbursement of eligible costs, the reimbursement rate specified in that Article is applied to the eligible costs of the *action* approved by the Commission for the corresponding categories of costs, beneficiaries and affiliated entities;
- (b) If, as provided for in Article I.3.2(b), the grant takes the form of a unit contribution, the unit contribution specified in that Article is multiplied by the actual number of units approved by the Commission for the corresponding beneficiaries and affiliated entities;
- (c) If, as provided for in Article I.3.2(c), the grant takes the form of a lump sum contribution, the Commission applies the lump sum specified in that Article for the corresponding beneficiaries and affiliated entities if it finds that the corresponding tasks or part of the *action* were implemented properly in accordance with Annex I;
- (d) If, as provided for in Article I.3.2(d), the grant takes the form of a flat-rate contribution, the flat rate referred to in that Article is applied to the eligible costs or to the contribution approved by the Commission for the corresponding beneficiaries and affiliated entities.

If Article I.3.2 provides for a combination of different forms of grant, the amounts obtained must be added together.

II.25.2 Step 2 — Limit to *maximum amount of the grant*

The total amount paid to the beneficiaries by the Commission may in no circumstances exceed the *maximum amount of the grant*.

If the amount obtained following Step 1 is higher than this maximum amount, the final amount of the grant is limited to the latter.

II.25.3 Step 3 — Reduction due to the no-profit rule

The grant may not produce a profit for the beneficiaries, unless specified otherwise in the Special Conditions.

'Profit' means the surplus of the amount obtained following Steps 1 and 2 plus the total receipts of the *action*, over the total eligible costs of the *action*.

The total eligible costs of the *action* are the consolidated total eligible costs approved by the Commission for the categories of costs reimbursed in accordance with Article I.3.2(a).

The total receipts of the *action* are the consolidated total receipts established, generated or confirmed on the date on which the request for payment of the balance is drawn up by the coordinator.

The following are considered receipts:

- (a) income generated by the *action*;
- (b) financial contributions given by third parties to a beneficiary or to an affiliated entity, if they are specifically assigned by the third parties to the financing of the eligible costs of the *action* reimbursed by the Commission in accordance with Article I.3.2(a)(i).

The following are not considered receipts:

- (a) financial contributions by third parties, if they may be used to cover costs other than the eligible costs under the Agreement;
- (b) financial contributions by third parties with no obligation to repay any amount unused at the end of the *implementation period*.

If there is a profit, it will be deducted in proportion to the final rate of reimbursement of the actual eligible costs of the *action* approved by the Commission for the categories of costs referred to in Article I.3.2(a)(i). The deduction will be applied on the amount calculated following Steps 1 and 2.

II.25.4 Step 4 — Reduction due to improper implementation or breach of other obligations

The Commission may reduce the *maximum amount of the grant* if the *action* has not been implemented properly as described in Annex I (i.e. if it has not been implemented or has been implemented poorly, partially or late), or if another obligation under the Agreement has been breached.

The amount of the reduction will be proportionate to the degree to which the *action* has been implemented improperly or to the seriousness of the breach.

Before the Commission reduces the grant, it must send a *formal notification* to the coordinator:

- (a) informing it of:
 - (i) its intention to reduce the *maximum amount of the grant*;
 - (ii) the amount by which it intends to reduce the grant;
 - (iii) the reasons for reduction; and

- (b) inviting it to submit observations within 30 calendar days of receiving the formal notification.

If the Commission does not receive any observations or decides to pursue reduction despite the observations it has received, it will send a *formal notification* informing the coordinator of its decision.

If the grant is reduced, the Commission must calculate the reduced grant amount by deducting the amount of the reduction (calculated in proportion to the improper implementation of the *action* or to the seriousness of the breach of obligations) from the *maximum amount of the grant*.

The final amount of the grant will be the lower of the following two:

- (a) the amount obtained following Steps 1 to 3; or
- (b) the reduced grant amount following Step 4.

ARTICLE II.26 — RECOVERY

II.26.1 Recovery at the time of payment of the balance

Where the payment of the balance takes the form of a recovery, the coordinator must repay the Commission the amount in question, even if it was not the final recipient of the amount due.

II.26.2 Recovery after payment of the balance

Where an amount is to be recovered as provided for in Articles II.27.6, II.27.7 and II.27.8, the beneficiary concerned by the audit or OLAF findings must repay the Commission the amount in question. Where the audit findings do not concern a specific beneficiary (or its affiliated entities), the coordinator must repay the Commission the amount in question, even if it was not the final recipient of the amount due.

Each beneficiary is responsible for the repayment of any amount unduly paid by the Commission as a contribution towards the costs incurred by its affiliated entities.

II.26.3 Recovery procedure

Before recovery, the Commission must send a *formal notification* to the beneficiary concerned:

- (a) informing it of its intention to recover the amount unduly paid;
- (b) specifying the amount due and the reasons for recovery; and
- (c) inviting the beneficiary to make any observations within a specified period.

If no observations have been submitted or if, despite the observations submitted by the beneficiary, the Commission decides to pursue the recovery procedure, the Commission may confirm recovery by sending a *formal notification* to the beneficiary consisting of a debit note, specifying the terms and the date for payment.

If payment has not been made by the date specified in the debit note, the Commission will recover the amount due:

- (a) by offsetting it, without the beneficiary's prior consent, against any amounts owed to the beneficiary by the Commission or an executive agency (from the Union or the European Atomic Energy Community (Euratom) budget) ('offsetting');

In exceptional circumstances, to safeguard the financial interests of the Union, the Commission may offset before the due date.

An action may be brought against such offsetting before the General Court of the European Union in accordance with Article 263 TFEU;

- (b) by drawing on the financial guarantee where provided for in accordance with Article I.5.2 ('drawing on the financial guarantee');
- (c) by holding the beneficiaries jointly and severally liable up to the maximum EU contribution indicated, for each beneficiary, in the estimated budget (Annex III as last amended);
- (d) by taking legal action as provided for in Article II.18.2 or in the Special Conditions or by adopting an enforceable decision as provided for in Article II.18.3.

II.26.4 Interest on late payment

If payment is not made by the date in the debit note, the amount to be recovered will be increased by late-payment interest at the rate set out in Article I.5.6 from the day following the date for payment in the debit note up to and including the date the Commission receives full payment of the amount.

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

II.26.5 Bank charges

Bank charges incurred in the recovery process must be borne by the beneficiary concerned, unless Directive 2007/64/EC⁵ applies.

ARTICLE II.27 — CHECKS, AUDITS AND EVALUATIONS

II.27.1 Technical and financial checks, audits, interim and final evaluations

The Commission may, during the implementation of the *action* or afterwards, carry out technical and financial checks and audits to determine that the beneficiaries are implementing the *action* properly and are complying with the obligations under the Agreement. It may also check the beneficiaries' statutory records for the purpose of periodic assessments of lump sum, unit cost or flat-rate amounts.

⁵ Directive 2007/64/EC⁵ of the European Parliament and of the Council of 13 November 2007 on payment services in the internal market amending Directives 97/7/EC, 2002/65/EC, 2005/60/EC and 2006/48/EC and repealing Directive 97/5/EC.

Information and documents provided as part of checks or audits must be treated on a confidential basis.

In addition, the Commission may carry out an interim or final evaluation of the impact of the *action*, measured against the objective of the Union programme concerned.

Commission checks, audits or evaluations may be carried out either directly by the Commission's own staff or by any other outside body authorised to do so on its behalf.

The Commission may initiate such checks, audits or evaluations during the implementation of the Agreement and during a period of five years starting from the date of payment of the balance. This period is limited to three years if the *maximum amount of the grant* is not more than EUR 60 000.

The check, audit or evaluation procedures are considered to be initiated on the date of receipt of the letter of the Commission announcing it.

If the audit is carried out on an affiliated entity, the beneficiary concerned must inform that affiliated entity.

II.27.2 Duty to keep documents

The beneficiaries must keep all original documents, especially accounting and tax records, stored on any appropriate medium, including digitalised originals when they are authorised by their respective national law and under the conditions laid down therein, during a period of five years starting from the date of payment of the balance.

The period during which documents must be kept is limited to three years if the *maximum amount of the grant* is not more than EUR 60 000.

The periods set out in the first and second subparagraphs are longer if there are ongoing audits, appeals, litigation or pursuit of claims concerning the grant, including in the cases referred to in Article II.27.7. In such cases, the beneficiaries must keep the documents until such audits, appeals, litigation or pursuit of claims have been closed.

II.27.3 Obligation to provide information

Where a check, audit or evaluation is initiated before the payment of the balance, the coordinator must provide any information, including information in electronic format, requested by the Commission or by any other outside body authorised by the Commission. Where appropriate, the Commission may request that a beneficiary provides such information directly.

Where a check or audit is initiated after payment of the balance, the information referred to in the previous subparagraph must be provided by the beneficiary concerned.

If the beneficiary concerned does not comply with the obligations set out in the first and second subparagraphs, the Commission may consider:

- (a) any cost insufficiently substantiated by information provided by the beneficiary as ineligible;

- (b) any unit, lump sum or flat-rate contribution insufficiently substantiated by information provided by the beneficiary as undue.

II.27.4 On-the-spot visits

During an on-the-spot visit, the beneficiaries must allow Commission staff and outside personnel authorised by the Commission to have access to the sites and premises where the *action* is or was carried out, and to all the necessary information, including information in electronic format.

They must ensure that the information is readily available at the moment of the on-the-spot visit and that information requested is handed over in an appropriate form.

If the beneficiary concerned refuses to provide access to the sites, premises and information as required in the first and second subparagraphs, the Commission may consider:

- (a) any cost insufficiently substantiated by information provided by the beneficiary as ineligible;
- (b) any unit, lump sum or flat-rate contribution insufficiently substantiated by information provided by the beneficiary as undue.

II.27.5 Contradictory audit procedure

On the basis of the findings made during the audit, a provisional report ('draft audit report') must be drawn up. It must be sent by the Commission or its authorised representative to the beneficiary concerned, which must have 30 calendar days from the date of receipt to submit observations. The final report ('final audit report') must be sent to the beneficiary concerned within 60 calendar days of expiry of the time limit for submission of observations.

II.27.6 Effects of audit findings

On the basis of the final audit findings, the Commission may take the measures it considers necessary, including recovery at the time of payment of the balance or after payment of the balance of all or part of the payments made by it, as provided for in Article II.26.

In the case of final audit findings after the payment of the balance, the amount to be recovered corresponds to the difference between the revised final amount of the grant, determined in accordance with Article II.25, and the total amount paid to the beneficiaries under the Agreement for the implementation of the *action*.

II.27.7 Correction of systemic or recurrent errors, irregularities, fraud or breach of obligations

II.27.7.1 The Commission may extend audit findings from other grants to this grant if:

- (a) the beneficiary concerned is found to have committed systemic or recurrent errors, *irregularities*, *fraud* or breach of obligations in other EU or Euratom grants awarded under similar conditions and such errors, *irregularities*, *fraud* or breach have a material impact on this grant; and

- (b) the final audit findings are sent to the beneficiary concerned through a *formal notification*, together with the list of grants affected by the findings within the period referred to in Article II.27.1

The extension of findings may lead to:

- (a) the rejection of costs as ineligible;
- (b) reduction of the grant as provided for in Article II.25.4;
- (c) recovery of undue amounts as provided for in Article II.26;
- (d) suspension of payments as provided for in Article II.24.1;
- (e) suspension of the *action* implementation as provided for in Article II.16.2;
- (f) termination as provided for in Article II.17.3.

II.27.7.2 The Commission must send a *formal notification* to the beneficiary concerned informing it of the systemic or recurrent errors and of its intention to extend the audit findings, together with the list of grants affected.

- (a) If the findings concern eligibility of costs the procedure is as follows:

Step 1 — The *formal notification* must include:

- (i) an invitation to submit observations on the list of grants affected by the findings;
- (ii) a request to submit revised financial statements for all grants affected;
- (iii) where possible, the correction rate for extrapolation established by the Commission to calculate the amounts to be rejected on the basis of the systemic or recurrent errors, *irregularities*, *fraud* or breach of obligations, if the beneficiary concerned:
 - considers that the submission of revised financial statements is not possible or practicable; or
 - will not submit revised financial statements.

Step 2 — The beneficiary concerned has 60 calendar days from when it receives the *formal notification* to submit observations and revised financial statements or to propose a duly substantiated alternative correction method. This period may be extended by the Commission in justified cases.

Step 3 — If the beneficiary concerned submits revised financial statements that take account of the findings the Commission will determine the amount to be corrected on the basis of those revised statements.

If the beneficiary proposes an alternative correction method and the Commission accepts it, the Commission must send a *formal notification* to the beneficiary concerned informing it:

- (i) that it accepts the alternative method;
- (ii) of the revised eligible costs determined by applying this method.

Otherwise the Commission must send a *formal notification* to the beneficiary concerned informing it:

- (i) that it does not accept the observations or the alternative method proposed;

- (ii) of the revised eligible costs determined by applying the extrapolation method initially notified to the beneficiary.

If the systemic or recurrent errors, *irregularities*, *fraud* or breach of obligations are found after the payment of the balance, the amount to be recovered corresponds to the difference between:

- (i) the revised final amount of the grant, determined in accordance with Article II.25 on the basis of the revised eligible costs declared by the beneficiary and approved by the Commission or on the basis of the revised eligible costs after extrapolation; and
 - (ii) the total amount paid to the beneficiaries under the Agreement for the implementation of the *action*;
- (b) If the findings concern improper implementation or a breach of another obligation the procedure is as follows:

Step 1 — The *formal notification* must include:

- (i) an invitation to the beneficiary to submit observations on the list of grants affected by the findings and
- (ii) the correction flat rate the Commission intends to apply to the *maximum amount of the grant* or to part of it, according to the principle of proportionality.

Step 2 — The beneficiary concerned has 60 calendar days from receiving the *formal notification* to submit observations or to propose a duly substantiated alternative flat-rate.

Step 3 — If the Commission accepts the alternative flat rate proposed by the beneficiary, it must send a *formal notification* to the beneficiary concerned informing it:

- (i) that it accepts the alternative flat-rate;
- (ii) of the corrected grant amount by applying this flat rate.

Otherwise the Commission must send a *formal notification* to the beneficiary concerned informing it:

- (i) that it does not accept the observations or the alternative flat rate proposed;
- (ii) of the corrected grant amount by applying the flat rate initially notified to the beneficiary.

If the systemic or recurrent errors, *irregularities*, *fraud* or breach of obligations are found after the payment of the balance, the amount to be recovered corresponds to the difference between:

- (i) the revised final amount of the grant after flat-rate correction; and
- (ii) the total amount paid to the beneficiaries under the Agreement for the implementation of the *action*.

II.27.8 Checks and inspections by OLAF

The European Anti-Fraud Office (OLAF) has the same rights as the Commission, particularly the right of access, for the purpose of checks and investigations.

Under Council Regulation (Euratom, EC) No 2185/96⁶ and Regulation (EU, Euratom) No 883/2013⁷ OLAF may also carry out on-the-spot checks and inspections in accordance with the procedures laid down by Union law for the protection of the financial interests of the Union against *fraud* and other *irregularities*.

Where appropriate, OLAF findings may lead to the Commission recovering amounts from beneficiaries.

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

II.27.9 Checks and audits by the European Court of Auditors

The European Court of Auditors has the same rights as the Commission, particularly the right of access, for the purpose of checks and audits.

⁶ 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.

⁷ 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).



Budget

Total cost of the action 1 077 556.73

Total eligible costs (D + I) 1 077 556.73

Total eligible direct costs (D) 1 007 062.36

Heading 1 - Staff costs

Management..... 91 125.36
Administration..... 766 501.00
Secretariat..... 0.00
Accounting..... 56 736.00
Other staff..... 0.00
Total - Staff costs..... 914 362.36

Heading 2 - Travel, accommodation and subsistence allowances

Travel..... 16 500.00
Subsistence allowances (accommodation, meals, etc.)..... 25 000.00
Total - Travel, accommodation and subsistence allowances..... 41 500.00

Heading 3 - Costs of services

Information dissemination..... 11 000.00
Translations..... 18 000.00
Reproductions and publications..... 7 000.00
Specific evaluation..... 0.00
Interpretations..... 8 400.00
External expertise..... 0.00
Other services..... 6 800.00
Total - Costs of services..... 51 200.00

Heading 4 - Administration costs

Depreciation for purchase of equipment..... 0.00
Hire of rooms..... 0.00
Hire of interpreting booths..... 0.00
Audits..... 0.00
Financial services..... 0.00
Other administrative costs..... 0.00
Total - Administration costs..... 0.00

Total eligible indirect costs (I) 70 494.37

Heading 5 - Overheads

Total overheads..... 70 494.37

Total revenue of the action 1 077 556.73

Income 1 077 556.73

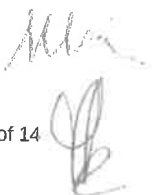
Income

Total financial contribution (own resources)..... 215 542.00

Revenue generated by the action..... 0.00

Union grant..... 862 014.73

Total Income..... 1 077 556.73



Budget by applicant

Total cost of the action	1 077 556.73
ANPAL	394 917.74
CGM	100 473.00
FGB	315 859.04
IMIO	62 092.10
REFORM	59 465.25
UIL	43 313.60
WLH	101 436.00
Total eligible costs (D + I)	1 077 556.73

Total eligible direct costs (D) 1 007 062.36

Heading 1 - Staff costs

ANPAL	345 082.00
CGM	87 600.00
FGB	247 195.36
IMIO	54 430.00
REFORM	51 975.00
UIL	36 880.00
WLH	91 200.00
Total - Staff costs	914 362.36

Heading 2 - Travel, accommodation and subsistence allowances

ANPAL	5 000.00
CGM	6 300.00
FGB	15 800.00
IMIO	3 600.00
REFORM	3 600.00
UIL	3 600.00
WLH	3 600.00
Total - Travel, accommodation and subsistence allowances	41 500.00

Heading 3 - Costs of services

ANPAL	19 000.00
FGB	32 200.00
Total - Costs of services	51 200.00

Heading 4 - Administration costs

Total - Administration costs..... 0.00

Total eligible indirect costs (I) 70 494.37

Heading 5 - Overheads

ANPAL 25 835.74

CGM 6 573.00

FGB 20 663.68

IMIO 4 062.10

REFORM 3 890.25

UIL 2 833.60

WLH 6 636.00

Total overheads..... 70 494.37

Total revenue of the action 1 077 556.73

Income 1 077 556.73

Income

CGM 20 100.00

FGB 63 172.00

IMIO 12 420.00

REFORM 11 900.00

UIL 8 670.00

WLH 20 290.00

Applicant's contribution after budget revision..... 78 990.00

Revenue generated by the action..... 0.00

Union grant..... 862 014.73

Total Income..... 1 077 556.73

M...

Heading 1 - Staff costs

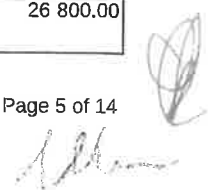
Management/Coordination (transnational and national)

Profile/category of personnel (Project Manager, Coordinator, etc.) + N° of persons per category	Name of the organisation	Types of employment (permanent/temporary) and work patterns (full-time/part-time)	Indicative daily salary cost	Number of days	Total
ANPAL					
Coordinator	ANPAL	permanent- full time	306.00	48.00	14 688.00
CGM					
Coordinator	CGM	permanent- full time	260.00	36.00	9 360.00
FGB					
Coordinator and researcher	FGB	permanent- full time	340.26	36.00	12 249.36
IMIO					
Vice-general Director	IWEO	permanent- full time	332.00	36.00	11 952.00
REFORM					
Manager	REFORM	permanent- full time	441.00	36.00	15 876.00
UIL					
Coordinator	UIL	permanent- full time	430.00	36.00	15 480.00
WLH					
Coordinator	WLH	permanent- full time	320.00	36.00	11 520.00

Total cost of management/coordination..... 91 125.36

Implementation of the project

Profile/category of personnel (Project officer, senior, junior etc.) + N° of persons per category	Name of the organisation	Types of employment (permanent/temporary) and work patterns (full-time/part-time)	Indicative daily salary cost	Number of days	Total
ANPAL					
Researcher	ANPAL	permanent- full time	250.00	800.00	200 000.00
Researcher	ANPAL	permanent- full time	251.00	200.00	50 200.00
Researcher	ANPAL	permanent- full time	306.00	200.00	61 200.00
Researcher	ANPAL	permanent- full time	251.00	50.00	12 550.00
CGM					
Researcher	CGM	permanent- full time	240.00	150.00	36 000.00
Researcher	CGM	permanent- full time	240.00	150.00	36 000.00
FGB					
Senior researcher	FGB	permanent- full time	335.00	80.00	26 800.00



Coordinator and researcher	FGB	permanent- full time	340.26	100.00	34 026.00
Researcher	FGB	permanent- full time	265.00	200.00	53 000.00
Senior researcher	FGB	permanent- full time	255.00	200.00	51 000.00
Junior researcher	FGB	temporary- full time	115.00	250.00	28 750.00
Researcher	FGB	permanent- full time	175.00	150.00	26 250.00
Researcher	FGB	temporary- full time	300.00	15.00	4 500.00
IMIO					
Researcher	IWEO	permanent- full time	293.00	70.00	20 510.00
Researcher	IWEO	permanent- full time	200.00	70.00	14 000.00
REFORM					
Researcher	REFORM	permanent- full time	291.00	45.00	13 095.00
Researcher	REFORM	permanent- full time	276.00	45.00	12 420.00
UIL					
Researcher	UIL	permanent- full time	230.00	40.00	9 200.00
Researcher	UIL	permanent- full time	250.00	20.00	5 000.00
WLH					
Coordinator and researcher	WLH	permanent- full time	320.00	100.00	32 000.00
Communication manager	WLH	permanent- full time	400.00	100.00	40 000.00

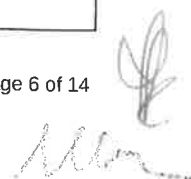
Total cost of Implementation of the project..... 766 501.00

Secretarial cost [No data entered]

Total cost of secretarial..... 0.00

Accounting

Profile/category of personnel (Senior, junior financial officer, etc.) + N° of persons per category	Name of the organisation	Types of employment (permanent/ temporary) and work patterns (full-time/part-time)	Indicative daily salary cost	Number of days	Total
ANPAL					
Administrative officer	ANPAL	permanent- full time	179.00	36.00	6 444.00
CGM					
Administrative officer	CGM	permanent- full time	260.00	24.00	6 240.00
FGB					
Financial director	FGB	permanent- full time	295.00	36.00	10 620.00
IMIO					
Administrative officer	IWEO	permanent- full time	332.00	24.00	7 968.00
REFORM					
Administrative officer	REFORM	permanent- full time	441.00	24.00	10 584.00



UIL					
Administrative officer	UIL	permanent- full time	200.00	36.00	7 200.00
WLH					
Administrative officer	WLH	permanent- full time	320.00	24.00	7 680.00

Total cost of accounting..... 56 736.00

Other staff [No data entered]

Total cost of Other staff..... 0.00

Total staff costs..... 914 362.36

Heading 2 - Travel, accommodation and subsistence allowances

Travel, accommodation and subsistence allowance

The "Daily cost per person" covers accommodation costs and the daily subsistence allowance (DSA).

Purpose of the travel	Place of the event	Average travel cost per person	Number of people	Travel sub-total	Daily Cost per person	Number of people	Number of days	Subsistence and accommodation sub-total	Total
ANPAL									
travel to localities for toolkit training	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit training	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to BXL to meet the COM	Bruxelles	300.00	2.00	600.00	200.00	2.00	2.00	800.00	1 400.00
CGM									
kickoff meeting	Rome	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
intermediate meeting	Rome	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
final conference	Rome	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
FGB									
kickoff meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
intermediate meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
final conference	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
travel to localities for toolkit training	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit training	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkit assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00

travel to localities for toolkint assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to BXL to meet the COM	Bruxelles	300.00	2.00	600.00	200.00	2.00	2.00	800.00	1 400.00
IMIO									
kickoff meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
intermediate meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
final conference	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
REFORM									
kickoff meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
intermediate meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
final conference	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
UIL									
travel to localities for toolkint assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkint assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkint assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
travel to localities for toolkint assessment	localities Italy	150.00	2.00	300.00	150.00	2.00	2.00	600.00	900.00
WLH									
kickoff meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
intermediate meeting	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00
final conference	Rome	300.00	2.00	600.00	150.00	2.00	2.00	600.00	1 200.00

Total of travel costs..... 16 500.00

Total of subsistence and accommodation costs..... 25 000.00

Total - Travel, accommodation and subsistence allowances..... 41 500.00

Heading 3 - Cost of services

Information dissemination

Nature of costs	Quantity	Unit cost	Total
FGB			
project visual identity, logo, social and web page	1.00	4 000.00	4 000.00
leaflet	1 000.00	4.00	4 000.00
social media campaign IT	1.00	3 000.00	3 000.00

Total information dissemination 11 000.00

Translations

Total number of languages (the document is translated to), cost per page (1 page=1500 characters without blanks)

Description of documents to be translated	Languages from ... to ...	Total number of languages	Cost per page	Number of pages	Total
FGB					
working documents	from EN to IT	2.00	30.00	150.00	9 000.00
final version of toolkit	from EN to IT	2.00	30.00	150.00	9 000.00

Total translations 18 000.00

Reproductions and publications

Document	Number of pages	Unit cost	Total
ANPAL			
final report	1 000.00	7.00	7 000.00

Total reproductions and publications 7 000.00

Specific evaluation [No data entered]

Total specific evaluation 0.00

Interpretations

Meeting	Languages	Number of interpreters	Number of days	Daily cost per interpreter	Total
ANPAL					
kickoff meeting	from IT to EN	2.00	1.00	700.00	1 400.00
kickoff meeting	from EN to IT	2.00	1.00	700.00	1 400.00
interim meeting	from IT to EN	2.00	1.00	700.00	1 400.00
interim meeting	from EN to IT	2.00	1.00	700.00	1 400.00
final conference	from IT to EN	2.00	1.00	700.00	1 400.00
final conference	from EN to IT	2.00	1.00	700.00	1 400.00

Total interpretations 8 400.00

External expertise [No data entered]

Total external expertise 0.00

Other Services

Service	Amount	Total
ANPAL		
final conference: welcome coffee (15x80) and lunch (30x80)	3 600.00	3 600.00

FGB		
kickoff meeting: 1 coffee break (12x30) and 1 light lunch (20x30) and 1 social dinner (20x30)	1 960.00	1 960.00
interim meeting: 2 coffee breaks (12x20) and 1 light lunch (20x20) and 1 social dinner (20x30)	1 240.00	1 240.00

Total other services..... 6 800.00

Total - Costs of services..... 51 200.00

Handwritten signature and initials in the bottom right corner of the page.

Heading 4 - Administration costs

Depreciation for purchase of equipment [No data entered]

Total depreciation..... 0.00

Hire of rooms [No data entered]

Total hire of rooms..... 0.00

Hire of interpreting booths [No data entered]

Total Hire of interpreting booths..... 0.00

Audits [No data entered]

Total audits..... 0.00

Financial costs [No data entered]

Total financial costs..... 0.00

Other administrative costs [No data entered]

Total Other Administrative costs..... 0.00

Total - Administration costs..... 0.00



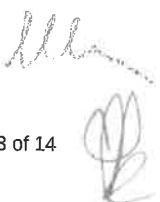
Heading 5 - Overheads

Applicant's overheads

Overheads are not eligible for operating grants

Incurring by	Amount
ANPAL	25 835.74
FGB	20 663.68
CGM	6 573.00
WLH	6 636.00
REFORM	3 890.25
IMIO	4 062.10
UIL	2 833.60

Total..... 70 494.37



Heading 6 - Income

Total Income (T = C + R + S)	1 077 556.73
Revenue generated by the action (R).....	0.00
Union grant (S).....	862 014.73
Total financial contribution (own resources) (C = C1 + C2 + C3)	215 542.00
Applicant's contribution after budget revision (C1).....	78 990.00

Co-applicants' contribution (C2)

Please be aware that the contribution of a co-applicant has to include the amount of its affiliated entities participating in this action

Co-applicant	Contribution
FGB	63 172.00
CGM	20 100.00
WLH	20 290.00
REFORM	11 900.00
IMIO	12 420.00
UIL	8 670.00

Total co-applicants' contribution (C2)..... 136 552.00

Third parties' contribution (C3) [No data entered]

Total third parties' contribution (C3)..... 0.00

Handwritten signature



**ANNEX IV
MANDATE¹**

I, the undersigned,

[Giuseppe Ciccarone, President, (future beneficiary in case the proposal is selected for funding) signing this mandate],

representing,

[Fondazione Giacomo Brodolini] [FGB]
[foundation]²
[RM- 1312529]³
[via Solferino 32, 00185 Rome Italy]
[01028621009],

hereinafter referred to as "the co-applicant", and if the grant is awarded, "the beneficiary",

for the purposes of the submission of the application and, if the proposal is selected, for the signature and the implementation of the grant agreement with the European Commission (hereinafter referred to as "the grant agreement")

hereby:

1. Mandate

National Agency for Active Labour Market Policies [ANPAL]

Public Law Body/National

Not Applicable⁴

Via Fornovo, 8 00192 Rome, Italy

97889240582,

represented by [Maurizio Del Conte, President ANPAL]

(hereinafter referred to as "the coordinator")

to submit the application for the action: [title of the action/proposal] and, in the case the proposal is selected for funding, and provided there are no changes in the proposal with an impact on my participation and role in the implementation of the action, to sign in my name and on my behalf the grant agreement and its possible subsequent amendments with the European Commission.

¹ One original version of this Annex to be included for each beneficiary except for the coordinator.

² To be deleted or filled in according to the "Legal Entity" form

³ To be deleted or filled in according to the "Legal Entity" form



2. In case the proposal is selected and the grant agreement signed, mandate the coordinator to act on behalf of the beneficiary in compliance with the grant agreement.

I hereby confirm that if the grant agreement is signed, the beneficiary accepts all terms and conditions of the grant agreement and, in particular, all provisions affecting the coordinator and the other beneficiaries. In particular, I acknowledge that, by virtue of this mandate and if the grant agreement is signed, the coordinator alone is entitled to receive funds from the Commission and distribute the amounts corresponding to the beneficiary's participation in the action.

I hereby accept that the beneficiary will do everything in its power to help the coordinator fulfil its obligations under the grant agreement, and in particular, to provide to the coordinator, on its request, whatever documents or information may be required.

I hereby declare that the beneficiary agrees that the provisions of the grant agreement, including this mandate, shall take precedence over any other agreement between the beneficiary and the coordinator which may have an effect on the implementation of the grant agreement.

This mandate shall be annexed to the grant agreement and shall form an integral part thereof.

SIGNATURE

[Giuseppe Ciccarone, President, Fondazione G. Brodolini]

[signature]

Rome, 11/04/2018

In duplicate in English





ANNEX IV
MANDATE¹

I, the undersigned,

[Stefano Granata of the legal representative of the co-applicant (future beneficiary in case the proposal is selected for funding) signing this mandate],

representing,

[GRUPPO COOPEARTIVO CGM] [CGM]
[Consortium of Social Enterprise]²
[MI-1925618]³
[Via Ermanno Barigozzi, 24]
[VAT number:03500760172],

hereinafter referred to as "the co-applicant", and if the grant is awarded, "the beneficiary",

for the purposes of the submission of the application and, if the proposal is selected, for the signature and the implementation of the grant agreement with the European Commission (hereinafter referred to as "the grant agreement")

hereby:

1. Mandate

National Agency for Active Labour Market Policies [ANPAL]

Public Law Body/National

Not Applicable⁴

Via Fornovo, 8 00192 Rome, Italy

97889240582,

represented by Maurizio Del Conte, president

(hereinafter referred to as "the coordinator")

to submit the application for the action: [EQW&L - Equality for work and life] and, in the case the proposal is selected for funding, and provided there are no changes in the proposal with an impact

¹ One original version of this Annex to be included for each beneficiary except for the coordinator.

² To be deleted or filled in according to the "Legal Entity" form

³ To be deleted or filled in according to the "Legal Entity" form



on my participation and role in the implementation of the action, to sign in my name and on my behalf the grant agreement and its possible subsequent amendments with the European Commission.

2. In case the proposal is selected and the grant agreement signed, mandate the coordinator to act on behalf of the beneficiary in compliance with the grant agreement.

I hereby confirm that if the grant agreement is signed, the beneficiary accepts all terms and conditions of the grant agreement and, in particular, all provisions affecting the coordinator and the other beneficiaries. In particular, I acknowledge that, by virtue of this mandate and if the grant agreement is signed, the coordinator alone is entitled to receive funds from the Commission and distribute the amounts corresponding to the beneficiary's participation in the action.

I hereby accept that the beneficiary will do everything in its power to help the coordinator fulfil its obligations under the grant agreement, and in particular, to provide to the coordinator, on its request, whatever documents or information may be required.

I hereby declare that the beneficiary agrees that the provisions of the grant agreement, including this mandate, shall take precedence over any other agreement between the beneficiary and the coordinator which may have an effect on the implementation of the grant agreement.

This mandate shall be annexed to the grant agreement and shall form an integral part thereof.

SIGNATURE

[Stefano, Granata, President]

[signature]

Gruppo Cooperativo Cgm s.p.a. a r.l.
Via E. Barigozzi - 24 - 20138 Milano
A.I.C. 03500760172
C.F. 01845670403

Done at [Milano], [6 April 2018]

In duplicate in English

*ANNEX
DECLARATION*

I, the undersigned,

Mr. Are Sæviak,

representing

[full official name of the future beneficiary] Reform – Resource Centre for Men [REFORM]

[official legal status or form]² Ideal foundation (NGO, Non for profit)

[official registration No]³ NO 384 727 245

[full official address] Pb 20 Sentrum, 0101 Oslo, Norway

[VAT number], Not Applicable

hereinafter referred to as "the co-applicant", and if the grant is awarded, "the beneficiary",

for the purposes of the submission of the application and, if the proposal is selected, for the signature and the implementation of the grant agreement with the European Commission (hereinafter referred to as "the grant agreement")

hereby:

I, Mandate

National Agency for Active Labour Market Policies [ANPAL]

Public Law Body/National

Not Applicable⁴

Via Fontana, 3 00192 Rome, Italy

97285240332

represented by Maurizio Del Conte, president

(hereinafter referred to as "the coordinator")

to submit the application for the action EQ/WEL - Equality for work and life and, in the case the proposal is selected for funding, and provided there are no changes in the proposal with an impact on my participation and role in the implementation of the action, to sign in my name

¹ One original version of this Annex to be included for each beneficiary except for the coordinator

² To be deleted or filled in according to the "Legal Entity" form

³ To be deleted or filled in according to the "Legal Entity" form



and on my behalf the grant agreement and its possible subsequent amendments with the European Commission.

2. In case the proposal is selected and the grant agreement signed, mandate the coordinator to act on behalf of the beneficiary in compliance with the grant agreement.

I hereby confirm that if the grant agreement is signed, the beneficiary accepts all terms and conditions of the grant agreement and, in particular, all provisions affecting the coordinator and the other beneficiaries. In particular, I acknowledge that, by virtue of this mandate and if the grant agreement is signed, the coordinator alone is entitled to receive funds from the Commission and distribute the amounts corresponding to the beneficiary's participation in the action.

I hereby accept that the beneficiary will do everything in its power to help the coordinator fulfil its obligations under the grant agreement, and in particular, to provide to the coordinator, on its request, whatever documents or information may be required.

I hereby declare that the beneficiary agrees that the provisions of the grant agreement, including this mandate, shall take precedence over any other agreement between the beneficiary and the coordinator which may have an effect on the implementation of the grant agreement.

This mandate shall be annexed to the grant agreement and shall form an integral part thereof.

SIGNATURE

Ane Caastad,
Director
Reform Resource Centre for Men

Oslo, Friday 5th of April, 2012

In duplicate in English

A handwritten signature in dark ink, appearing to be 'Ane Caastad', located in the bottom right corner of the page.

ANNEX IV
MANDATE¹

I, the undersigned,

LUCÍA CERÓN HERNÁNDEZ, representing,

The Institute of Women and for Equal Opportunities [IWEO]

Public Law Body/National

Q2828016B

C/ Condesa de Venadito 34, Madrid 28027. Spain

hereinafter referred to as "the co-applicant", and if the grant is awarded, "the beneficiary", for the purposes of the submission of the application and, if the proposal is selected, for the signature and the implementation of the grant agreement with the European Commission (hereinafter referred to as "the grant agreement")

hereby:

1. Mandate

National Agency for Active Labour Market Policies [ANPAL]

Public Law Body/National

Not Applicable²

Via Fornovo, 8 00192 Rome, Italy

97889240582.

represented by Maurizio Del Conte, president

(hereinafter referred to as "the coordinator")

to submit the application for the action: VP/2018/005 - EQW&L-Equality for work and Life and, in the case the proposal is selected for funding, and provided there are no changes in the proposal with an impact on my participation and role in the implementation of the action, to sign in my name and on my behalf the grant agreement and its possible subsequent amendments with the European Commission.

¹ One original version of this Annex to be included for each beneficiary except for the coordinator.



2. In case the proposal is selected and the grant agreement signed, mandate the coordinator to act on behalf of the beneficiary in compliance with the grant agreement.

I hereby confirm that if the grant agreement is signed, the beneficiary accepts all terms and conditions of the grant agreement and, in particular, all provisions affecting the coordinator and the other beneficiaries. In particular, I acknowledge that, by virtue of this mandate and if the grant agreement is signed, the coordinator alone is entitled to receive funds from the Commission and distribute the amounts corresponding to the beneficiary's participation in the action.

I hereby accept that the beneficiary will do everything in its power to help the coordinator fulfil its obligations under the grant agreement, and in particular, to provide to the coordinator, on its request, whatever documents or information may be required.

I hereby declare that the beneficiary agrees that the provisions of the grant agreement, including this mandate, shall take precedence over any other agreement between the beneficiary and the coordinator which may have an effect on the implementation of the grant agreement.

This mandate shall be annexed to the grant agreement and shall form an integral part thereof.

SIGNATURE

Lucía Cerón, Director of the Institute of Women and for Equal Opportunities,

Signature,

Done at Madrid, April 11, 2018

In duplicate in English



ANNEX IV
MANDATE¹

I, the undersigned, Ágnes Uherezky, representing the WorkLife HUB, SPRL (Société Privée à Responsabilité Limitée), registered under the number: 0556.736.349, at the address: Cours Saint Michel 30b, Etterbeek, 1040, Brussels, Belgium, with the VAT number BE0556736349,

hereinafter referred to as "the co-applicant", and if the grant is awarded, "the beneficiary",

for the purposes of the submission of the application and, if the proposal is selected, for the signature and the implementation of the grant agreement with the European Commission (hereinafter referred to as "the grant agreement")

hereby:

1. Mandate

National Agency for Active Labour Market Policies [ANPAL]

Public Law Body/National

Not Applicable²

Via Fornovo, 8 00192 Rome, Italy

97889240582,

represented by Maurizio Del Conte, president

(hereinafter referred to as "the coordinator")

to submit the application for the action: "EQW&L-Equality for work and Life" and, in the case the proposal is selected for funding, and provided there are no changes in the proposal with an impact on my participation and role in the implementation of the action, to sign in my name and on my behalf the grant agreement and its possible subsequent amendments with the European Commission.

2. In case the proposal is selected and the grant agreement signed, mandate the coordinator to act on behalf of the beneficiary in compliance with the grant agreement.

I hereby confirm that if the grant agreement is signed, the beneficiary accepts all terms and conditions of the grant agreement and, in particular, all provisions affecting the coordinator and the other beneficiaries. In particular, I acknowledge that, by virtue of this mandate and if the grant agreement is signed, the coordinator alone is entitled to receive funds from the

¹ One original version of this Annex to be included for each beneficiary except for the coordinator.



Commission and distribute the amounts corresponding to the beneficiary's participation in the action.

I hereby accept that the beneficiary will do everything in its power to help the coordinator fulfil its obligations under the grant agreement, and in particular, to provide to the coordinator, on its request, whatever documents or information may be required.

I hereby declare that the beneficiary agrees that the provisions of the grant agreement, including this mandate, shall take precedence over any other agreement between the beneficiary and the coordinator which may have an effect on the implementation of the grant agreement.

This mandate shall be annexed to the grant agreement and shall form an integral part thereof.

SIGNATURE

AGNES UHERECZKY, Executive director

Done at Brussels, 9th April 2018

In duplicate in English





IL SEGRETOARIO GENERALE
IL SEGRETARIO REGIONALE

ANNEX IV
MANDATE

I, the undersigned,

[forename and surname of the legal representative of the co-applicant (future beneficiary in case the proposal is selected for funding) signing this mandate].

representing,

UNIONE ITALIANA DEL LAVORO, UIL
NO PROFIT ASSOCIATION, TRADE UNION
21316
VIA LUCULLO 6, 00187, ROME, ITALY

hereinafter referred to as "the co-applicant", and if the grant is awarded, "the beneficiary",

for the purposes of the submission of the application and, if the proposal is selected, for the signature and the implementation of the grant agreement with the European Commission (hereinafter referred to as "the grant agreement")

hereby:

I. Mandate

National Agency for Active Labour Market Policies [ANPAL]

Public Law Body/National

Not Applicable²

Via Formosa, 8 00192 Rome, Italy

97889240582.

¹ One original version of this Annex to be included for each beneficiary except for the coordinator.

ADERENTE ALLA CONFEDERAZIONE INTERNAZIONALE DEI SINDACATI (CSI) E ALLA CONFEDERAZIONE EUROPEA DEI SINDACATI (CES)

SEDE NAZIONALE
VIA LUCULLO, 6 - 00187 ROMA
CENTRALINO +39 06 47531
DIRETTO 06 4753210 / 275 / 276 Fax 06 4753295
E-MAIL: segreteria@generale UIL.it
PEC: segreteria@pecert UIL.it
SITO WEB:

SEDE EUROPEA
INTERNATIONAL TRADE UNION HOUSE
BOULEVARD ROYAL ALBERT II, 5
B-1210 BRUXELLES
TELEFONO +32 (0) 2 21 83 055
E-MAIL: bruxelles@uil.it

17° CONGRESSO
NAZIONALE UIL

represented by Maurizio Del Conte, president

(hereinafter referred to as "the coordinator")

to submit the application for the action: [title of the action/proposal] and, in the case the proposal is selected for funding, and provided there are no changes in the proposal with an impact on my participation and role in the implementation of the action, to sign in my name and on my behalf the grant agreement and its possible subsequent amendments with the European Commission.

2. In case the proposal is selected and the grant agreement signed, mandate the coordinator to act on behalf of the beneficiary in compliance with the grant agreement.

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I hereby declare that the beneficiary agrees that the provisions of the grant agreement, including this mandate, shall take precedence over any other agreement between the beneficiary and the coordinator which may have an effect on the implementation of the grant agreement.

This mandate shall be annexed to the grant agreement and shall form an integral part thereof.

SIGNATURE



Carmelo Barbagallo, UIL General Secretary

ADERENTE ALLA CONFEDERAZIONE INTERNAZIONALE DEI SINDACATI (CISL) E ALLA CONFEDERAZIONE EUROPEA DEI SINDACATI (CEPS)

SEDE NAZIONALE
VIA LUCULLO, 6 - 00187 ROMA
CENTRALINO +39 06 47531
DIRITTO 06 4753210 / 275 / 276 Fax: 06 4753295
E-MAIL: segreteria generale@uil.it
PEC: segreteria generale@pecert.uil.it
SITO WEB:

SEDE EUROPEA
INTERNATIONAL TRADE UNION HOUSE
BOULEVARD ROY ALBERT II, 5
B-1210 BRUXELLES
TELEFONO +32 (0) 2 21 83 055
E-MAIL: bruxelles@uil.it

17 CONGRESSO
NAZIONALE UIL



[signature]

Done at Rome, 12/04/2018

In duplicate in English

ADERENTE ALLA CONFEDERAZIONE INTERNAZIONALE DEI SINDACATI (CIS) E ALLA CONFEDERAZIONE EUROPEA DEI SINDACATI (CES)

SEDE NAZIONALE
VIA LUCULLO, 6 - 00187 ROMA
CENTRALINO +39 06 47531
DIRETTO 06 4753210 / 275 / 276 Fax 06 4753295
E-MAIL: segreteria generale@uil.it
PEC: segreteria generale@pecer.uil.it
SITO WEB:

SEDE EUROPEA
INTERNATIONAL TRADE UNION HOUSE
BOULEVARD ROY ALBERT II, 5
B-1210 BRUXELLES
TELEFONO +32 (0) 2 21 83 055
E-MAIL: bruxelles@iuid.it

17 CONGRESSO
NAZIONALE UIL

ANNEX TO THE GRANT AGREEMENT

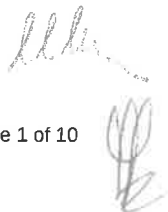
Final technical report template related to activities launched using funding from the European Union Programme for Employment and Social Innovation

EaSI 2014-2020

This exercise should tell us how the EU-funded action under EaSI Programme (Regulation EU No 1296/2013) has progressed and what was achieved in the funding period.

This form must be completed in English.

The deadline for returning BOTH hard and electronic versions of your report is indicated in the Special Conditions of your grant agreement.

Handwritten signature and a circular stamp or logo.

QUALITATIVE INFORMATION

Results

Main objectives

List the original goals and objectives of the action as set out in the grant agreement, and explain how they were met during the implementation period.

Policy themes

Summary of the implementation of the activities

Please summarise your action as well as any difficulties you have faced in implementing it.

Please report separately on each group of activities and/or component of your action.

Activity

Planned

Please shortly present your project plan/activity plan as outlined in the approved action grant agreement.

Implemented

Please describe the activities and results of the action

Changes

Was there any variance from the original action plan?

- Yes
 No

Describe any variance from the original action plan. Describe how and why, provide justification of the change(s) made and impact on project implementation.

Target groups involved

- National, regional and local authorities
- Employment services
- Specialist bodies provided for under Union law
- Social partners
- Non-governmental organisations
- Higher education institutions and research institutes
- Experts in evaluation and in impact assessment
- National statistical offices
- Media
- Others

Mention the other target groups

Issues addressed by the project

- Youth employment
- Combat long-term unemployment
- Fight against poverty and social exclusion
- Promotion of equality between women and men
- Promotion of a high level of quality and sustainable employment
- Guarantee adequate and decent social protection
- Combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation; pay particular attention to vulnerable groups, such as young people
- Transnational dimension

How were those issues addressed?

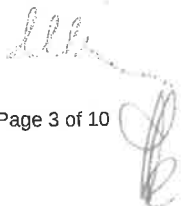
Key messages, conclusions and policy follow-up

Key messages

Conclusions

What are the most important conclusions and lessons learned from the action?

Policy follow-up



EXECUTIVE SUMMARY

Beneficiaries/contractors must provide in the final technical implementation report, or upon specific request, an executive summary regarding the results /impact achieved by the project.

The executive summary will be published. It should be a stand-alone summary of the action and its implications. It should be concise (max 7500 characters), written in plain language and be made available to the Commission in **English**. Other EU languages are welcome but optional.

The executive summary must include the following::

1. Short description of the action:

Context and policy areas, main objectives, target group(s) and key activities and deliverables (provide also the publication and website address).

- **The context of the action.** Please describe why your organisation or consortium decided to implement this particular action. Is this action a follow-up to any previously implemented activities funded either by national or EU funds? Where does this action fit in the overall activities/strategy of your organisation? To which of the local/national/EU level policies your action contributes?
- **Main policy areas and sub-areas.** Please mention policy areas and sub-areas where your action is expected to take an effect. For example, a policy area can be indicated as 'social protection and social inclusion,' while 'long term care' could be a sub-area. Please elaborate where exactly your action aims to contribute in terms of the indicated policy areas and sub-areas.
- **Main objectives.** Please indicate what your action aimed to achieve.
- **Key activities.** Please indicate the main activities that you implemented to achieve the objectives listed in the section above. If you have introduced any significant changes to what was planned in the beginning of the project, please explain why these changes were necessary and what effect they had on the outcomes of the action.
- **Target groups.** Please indicate the target groups of your action. Please comment if you took any actions in order to involve groups that are vulnerable (e.g. young people, long-term unemployed). Did you take any actions in order to ensure that women and men are equally included in your activities?
- **Deliverables.** Please indicate what are the main deliverables of your action? Were they published in paper or on-line? If so, please provide the links/references to publications. Please explain how have the main deliverables of the project contributed to achievement of the project objectives listed above? If available, please also provide a website of your action.

2. Conclusions:

Description of results, impacts and EU added value.

- **Results of the action.** List all the relevant results of your action. Please directly address the issue whether your action achieved everything that you have planned. For this, please compare your results with the objectives that you have indicated above. In case you have not achieved everything that was planned, please explain why this was the case.
 - **Impacts of the action.** Please list the impacts of your action (actual or expected). Since it might take time for the impacts to materialise, please also reflect on the expected impacts. Please indicate the impacts of your action on: the population (local, national or EU), your organisation, other national or EU organisations, policy (at the local, national, EU or international level). Will the achieved impacts be sustainable? What are the factors suggesting the sustainability or unsustainability of the impacts?
 - **EU added value.** According to the Better Regulation Guidelines, EU-added value looks for changes, which (as it can be reasonably argued) are due to EU intervention rather than any other factors. EU added value may result from different factors e.g. co-ordination gains, improved legal certainty, greater effectiveness or complementarity. Please indicate:
 - a. Could you have implemented a similar action without the EU funding? Where exactly the EU funding has mostly contributed in your action's budget?
 - b. Has a given effect of the action been achieved at a lower cost for taxpayers because the intervention took place at EU level?
 - c. Has your action implemented or led to networking among the national/EU organisations?
- In addition, depending on the type and nature of the action, please try to answer the following questions:
- d. Has your action contributed to implementing the EU legislation or ensuring that the legislation is correctly implemented?
 - e. Have you implemented/promoted any "best practices" identified under your previous activities? Could you mention such practices?
 - f. Have you implemented any activities that allowed for benchmarking among the Member States (such as peer reviews, mutual learning events)? Do you have any examples of decisions based on such benchmarking activities?
 - g. Have your activities allowed for mitigation of any cross-border risks that might have harmed your activities if they were implemented only at the national level? Please explain.
 - h. Has your action contributed to the free movement of persons? If yes, please explain how.

When completing this part, please focus in particular on pointing out the potential good practices implemented during the project.

Good practice is a process or a methodology that has been proven to work well and produce good results, and is therefore recommended as a model or as a useful example. To indicate the potential good practices, please consider the following questions:

- Are there any elements of the project that could be transferred/up-scaled to other similar contexts? Is it foreseen?

- Are there any elements of the project that you consider innovative?
- Was new policy evidence (studies, reports, methodologies, etc.) produced as a result of the project?
- What are the key impacts of your action?
- Were there any elements of the project that could not have been implemented without the EU support?
- Will the results/impacts of the project be sustainable after it finishes? How will the sustainability of the project impacts be ensured?
- Did you develop new partnerships (national/EU/international) as a result of this action? Are these partnerships lasting?

3. Policy follow-up:

Description of the policy follow up and recommendations.

- **The expected policy follow-up.** Please indicate whether your or other organisations (to the best of your knowledge) have plans to replicate or up-scale this action. Will the action be continued without the EU funding? Will other organisations implement a similar action because they have learned from your action? Will any other actions be taken as a follow-up for your action?
- **Lessons and recommendations.** Please provide a short list of lessons and recommendations resulting from your projects. What have you learned from the implementation of this action that could be used in the future by other organisations implementing similar actions? What obstacles have you faced and how did you react? Based on your action, what would you recommend for other similar organisations working in the same policy area?

Short description of the action

Context and policy areas, main objectives, target group(s) and key activities and deliverables (provide also the publication and website address)

Conclusions

Description of achievements, impacts and EU added value

Policy follow-up

Description of the policy follow-up and recommendations

Translations

You can now add the translations of the executive summary entered before. This information will also be published on the website allowing more people to know about your action.

Translation

Title of the action

Language

Short description of the action

Context and policy areas, main objectives, target group(s) and key activities and deliverables (provide also the publication and website address)

Conclusions

Description of achievements, impacts and EU added value

Policy follow-up

Description of the policy follow-up and recommendations

QUANTITATIVE INFORMATION

Please enter the information on outputs delivered by the action.

Analytical outputs

Enter the number of outputs irrespective of whether they were published or not. An output produced in several languages counts as a single output.

Number of newly developed and/or maintained quantitative and qualitative databases

Number of common methodologies, classifications, micro-simulations, indicators and benchmarks

Number of reports: surveys, studies, analyses and expertise

Number of evaluations and impact assessments

Number of monitoring and assessment reports on the transposition and implementation of Union law

Has your project implemented social policy experimentation as a method for testing and evaluating innovative solutions?

Yes
 No

Outputs dissemination

Please explain how and to whom the reports were disseminated: target audiences (e.g. EU, national, regional or local policy-makers, socio-economic partners, etc.) and means used (e.g. printed copies, Internet, etc.) (Max 2000 characters)

Output dissemination

Enter the number of outputs related to mutual learning, awareness raising and dissemination.
(1) Provide the list of participants: name, sex, type of organisation, country and e-mail addresses.

Training sessions of legal and policy practitioners (1)

Number of sessions

Number of women

Number of men

Total number of participants

Exchanges of good practice, peer reviews and mutual learning events (1)

Number of events

Number of women

Number of men

Total number of participants

Conferences, seminars and other high-level events (1)

Number of events

Number of women

Number of men

Total number of participants

Number of guides, educational material

Number of information systems developed and maintained in order to exchange and disseminate information

Other information and communication actions (including those targeted to the media)

Output dissemination

Please explain how and to whom were the outputs disseminated: target audiences (e.g. EU, national, regional or local policy-makers, socio-economic partners, etc.) and means used (e.g. newsletters, newspapers, community of practices, etc.)(Max 2000 characters)

Support outputs

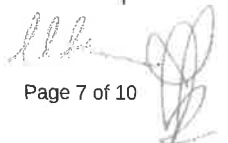
Enter the number of outputs related to capacity building and support to actors.
(1) Provide the list of participants: name, sex, type of organisation, country and email addresses.

Number of EU multilingual digital platforms and electronic exchange systems

Number of provisions of information, counsellings, placements and recruitment services

Number of events supporting capacity building actions (1)

Please indicate the number of events supporting capacity building actions for national, regional and local administrations, specialist services responsible for promoting geographical mobility, civil society organisations, social partners, microcredit providers



Number of events

Number of women

Number of men

Total number of participants

Number of working groups organised for national officials to monitor the implementation of Union law (1)

Please indicate the number of working groups organised for national officials to monitor the implementation of Union law

Number of events

Number of women

Number of men

Total number of participants

Number of events supporting networking and cooperation meetings (1)

Please indicate the number of events supporting networking and cooperation meetings among specialist bodies and other relevant stakeholders, national, regional and local authorities and employment services at European level

Number of events

Number of women

Number of men

Total number of participants

Number of exchanges of personnel between national, regional and local administrations (1)

Please indicate the number of exchanges of personnel between national, regional and local administrations, employment services, civil society organisations, social partners, international organisations or other organisations

Number of events

Number of women

Number of men

Total number of participants

Please enter the number of participants belonging to:

National, regional and local administrations

Employment services

Civil society organisations, including NGOs

Social partners

International
organisations

European-level
observatories

Microcredit providers and investors in social
enterprises

Dissemination

Please explain how and to whom were the actions disseminated: target audiences (e.g. EU, national, regional or local policy-makers, socio-economic partners, etc.) and means used (e.g. newsletters, newspapers community of practices, etc.)
(Max 2000 Characters)

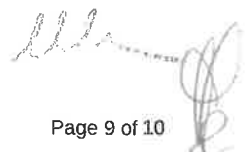
Notice to participants of events to be announced by the organisers:

Persons taking part in this event will be registered in a document called 'the list of participants', which will include at least their first and last names and e-mail addresses. Depending on particular cases, it might also include participants' sex, organisation and country details. The personal data included in the list of participants will be necessary and used for monitoring of the EU Programme for Employment and Social Innovation (EaSI), including for surveys carried out throughout the programme duration.

The participants in EaSI-supported events can be contacted via surveys to learn their views and opinions about an EaSI-supported event in which they have participated, e.g. a conference, meeting, seminar or other type of event funded fully or partially by the EaSI programme.

The collected personal data and all information related to the above mentioned surveys is stored on a server of the external contractor of the European Commission, who guarantees the data protection and confidentiality required by the Regulation (EC) 45/2001.

When you receive the survey, you will be able to verify, which personal data is stored, have it modified, corrected, or deleted. You will also have the possibility to ask questions regarding surveys or on the processing of information in the context of the surveys.



SIGNATURE

Declaration

Title

First name

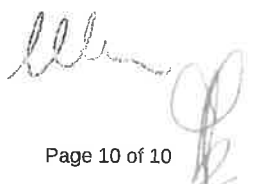
Surname

Position held in the organisation

Organisation name

I confirm that I am duly authorised to sign this declaration on behalf of the organisation named. I certify that the information given in this report is correct, accurate, current, and adopted or approved by the organisation for which I lead. I understand that the Commission may contact me to clarify any details in this report, including providing any supplementary information as applicable. I confirm that I am authorised by my organisation for this purpose.

On behalf of the organisation: date and signature



CALL FOR PROPOSALS INNOVATIVE WORK LIFE BALANCE STRATEGIES TO FACILITATE
RECONCILIATION OF PROFESSIONAL AND CARING RESPONSIBILITIES VP/2018/005

PROJECT TITLE: EQW&L-EQUALITY FOR WORK AND LIFE

APPLICATION REF.: VP/2018/005/01.14

PROJECT DETAILED WORKPROGRAMME

Title

EQW&L-Equality for work and Life

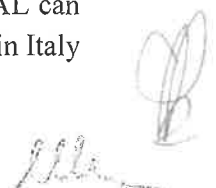
Name of the organisation responsible for implementing the project:

ANPAL (Italy)

Description of the project and the work programme

The EQ&WL project aims to elaborate and test a set of strategies, a new model of intervention and a toolkit to **facilitate the access to labour market of unemployed persons** – women but not only women - who are hindered from a getting a job by their reconciliation needs and to **support SMEs** – and namely those in the social economy – in their process of **getting awareness of the potentialities of working environments work-life balance friendly**.

The project implementation is organised in six phases, covering project start up, testing of EQ&WL toolkit, delivery of the social intervention, data analysis, general project evaluation, dissemination and project management. The first five months (**Phase 1**) will be devoted to: project start & set-up, refining the comprehensive toolkit and model of intervention; training PES staff and creating local networks of SMEs among which raising awareness on work life balance needs of employees **Phase 2** (months 6-18) will be devoted to testing of the EQ&WL model of intervention and toolkit with around 196 unemployed persons in 4 Italian Regions. In this phase awareness raising activities among SMEs on work life balance will be also conducted and monitored. During the following 4 months (**Phase 3**), data collected during the experimentation will be analysed and interpreted to address our key research questions on the effects of our experimentation and to identify causal explanations for different effects. Monitoring and evaluation activities on the research process and outputs will be conducted with the support of the stakeholders involved in the project (**Phase 4** – months 1-24). The up-scaling strategy process and follow up activities will be aimed at disseminating the action to both immediate stakeholders and a wider audience in the areas involved in the project (**Phase 5** – months 2-24). The definition of a detailed dissemination plan as well as the role ANPAL can play in the up-scaling process will serve this goal, while a transnational final conference in Italy



and the publication of a final report will act as additional dissemination tools (**Phase 5**, months 3-24). **Phase 6** (months 1-24) will be devoted to project management and coordination, including periodical reporting to the Commission and attending to scheduled meetings in Brussels. Overall, the project is designed to maximize opportunities for cross-regional comparison of findings.

Names of the partners involved in the implementation of the project, and their role:

Partner	Type of organisation	Role	Responsibilities and tasks
ANPAL	National Public body	Applicant	Project coordination, Scientific coordination Responsible for Up - scaling activities
CGM	Association of companies	Co-applicant	Support to tool kit definition and piloting – bringing SMEs perspective
WLB HUB	European consulting company	Co-applicant	Support to tool kit definition providing insights on EU strategies for Work life balance strategies; coordinating dissemination at EU level
IWEO	Public Body	Co-applicant	Support to tool kit definition providing insights on Spanish experience in building the work life balance business case for companies, contributing to dissemination at EU level
REFORM	Private association of citizens	Co-applicant	Support to tool kit definition providing insights on how to promote a higher participation of men to care duties and responsibilities, contributing to dissemination at EU level
FGB	Non profit research centre	Co-applicant	Designing and implementing the monitoring and evaluation system for assessing the piloting experience, elaborating toolkit and guidelines, coordinating Italian dissemination activities
UIL	Social partner	Co-applicant	Support to tool kit definition providing insights on social partners perspective (resistances, points of strength) including focus on company welfare and firm level agreements
Regione Campania	Regional public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars

			and final conference of the project, participating in the validation process of the project' experimentation
Regione Toscana	Regional public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
Regione Piemonte	Regional public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
Provincia Autonoma di Trento	Local public body	Associated partner	Support local experimentation providing contextualized inputs for the elaboration of the toolkit, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
CEEP	European social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the EU social partner perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
ETUC	European social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the EU social partner perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation

Italian Equal Opportunity Body	Public body	Associated partner	Support the assessment of the toolkit and its assessment, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
INPS	Public administration	Associated partner	Supporting the definition and assessment of the toolkit providing access to contextualized data for monitoring and evaluation, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
CGIL nazionale	Social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the national trade union perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation
CISL nazionale	Social partner	Associated partner	Support the definition of the toolkit and its assessment bringing the national trade union perspective, contribute to the dissemination of the project' outcomes, participation in the seminars and final conference of the project, participating in the validation process of the project' experimentation

Phase 1 Project start up

The overall goal of Phase 1 is to put in place the organizational and procedural framework in order to guarantee smooth implementation of the action.

A kick-off meeting will be organized within the first month of the project in Rome involving the participation of all project co-applicant and as much as possible associated partners. The project aims and steps will be discussed and consolidated and there will be the opportunity for partners to settle project management and organisation activities, financial, administrative and logistical issues. Partners will agree on the on the model of intervention, the *toolkit framework*, awareness raising activity plan and on the research guidelines, which will operate in all Regions. The model of intervention, the toolkit framework, the awareness raising activity plan among

SMEs and the research guidelines will be proposed by the applicant in cooperation with WLH HUB and FGB.

During the following four months applicant and co-applicants will share **knowledge, practices and tools in order to define the model of intervention, the toolkit, the awareness raising activities plan and the research guidelines**. With the aim of maximising the participation of transnational partners while minimising costs, web conferences facilities will be used in order to organise a set of workshop involving all co-applicants and aiming at selecting effective work life balance strategies and practices and adapting them to the toolkit. The model of intervention, the toolkit and the awareness raising activities plan so obtained will be the result of the cooperation among international group of experts in work-life balance and employment.

A special focus in the toolkit will be placed in the definition of the business case for implementing Work Life Balance in SMEs, based on the insights shared by IWEO from the Spanish network experience and the design of a plan for awareness raising activities. During this phase piloting procedures will be finalised (see paragraph below) as well as training contents for PES' personnel who will implement the model of intervention and the toolkit; training contents will be defined according to their exigencies and with their direct involvement.

Given the experimental character of EQ&WL the continuous participation of a team of researchers/trainers is provided. Every researcher/trainer will be in charge of cooperating with the PES personnel in their activities related to the project and in collecting relevant data and information for the monitoring/evaluation activities requested for the evaluation activities.

In the last two months of this phase local networks for work life balance services delivery will be activated.

Training of PES staff to support participants

This is an essential component to prepare PES personnel for the level of support that will be required for the unemployed person to be re-integrated in the labour market with the necessary support in terms of work life balance. A training package for PES staff will be developed during the first part of the project, which would enable them to assess participants needs, and design the individually tailored project for every participant necessary to optimally target a new job through adequate work life balance support. This will be achieved by training PES personnel on the model of intervention and on the toolkit, both in terms of identifying key work life balance needs to target (i.e., types of reconciliation needs: children 0-2; children 3-6; elderly to care for; people with disabilities to care for; combination of the above). Knowledge sharing and on-the-job support will be the training methods applied. The training will focus on both the model of intervention and the toolkit content. Trainers will also provide a concrete on-the-job support to PES' staff with the aim of **jointly identifying which elements would contribute to enhance the range of services they already offer for reconciliation**. This training will take place at month 3 and 4 from the beginning of the project.



Duration: months 1-5

Outputs:

- Toolkit framework and outline (EN, IT)
- Training materials
- Business case for Work Life balance in SMEs and raising awareness activities plan
- Research procedures and manual for project delivery
- Local networks for work life balance services delivery

Phase 2 Testing EQ&WL toolkit

-The methodological approach : quasi-experimental design of the project

EQ&WL is an intervention study, employing a quasi-experimental quantitative/qualitative pre-post within and between group design. It envisages the design and quasi-experimentation of a model of intervention and a work-life balance toolkit to tailor interventions for every single case. The quasi-experimental design will be adopted for a threefold evaluation: first, for the evaluation of the model of intervention adopted during the project by PES personnel; second, for the assessment of the tools included in the toolkit designed during the initial phase of the project; third, for assessing the awareness raising activities conducted among the SMEs involved in the project.

The three aspects will be the objects of the evaluation activities.

The assessment of the effectiveness of both the intervention model and the toolkit will be conducted by applying a quasi-experimental design¹ The dependent variable is the probability for the person unemployed to find a job during the time of observation.

Among the independent factors that the quasi-experimental design will control for, we considered:

- assignment to intervention (adoption of the new model of intervention; usual model of intervention),
- age
- gender

¹ Shadish W.R., Cook T.D., Campbell D.T., (2002), Experimental and quasi-experimental designs for generalized causal inference, Houghton Mifflin Company.

Campbell D.T. (1969), 'Reforms as experiments', in American Psychologist (24), 409-429.



- specific context of the labour market in the region and the locality particularly the demand for labour by SMEs)

Specific work-life balance needs (children 0-2; children 3-6; elderly to care for; people with disabilities to care for; combination of the above).

Other independent variables will be considered in the quasi-experiment by applying the comparison within the same experimental group.

The awareness raising activities plan will be assessed by collecting questionnaires among SMEs on the perception of the relevance of work life balance issue before the intervention and after the intervention and on the effectiveness in employee retention of work life balance policies.

Because of the complexity of interventions used in the EQ&WL programme, robust methodological approaches especially designed for such studies are required. The same quantitative and qualitative methodological approach is used in all the selected Italian regions/localities. The argument for this is that if we obtain the same changes or similar trends in dependent variables in all selected localities, it will be easier to assess whether the change results from the EQ&WL intervention. To assess the effects, mixed methods will be used: questionnaires to be administered to the unemployed persons involved in the experimentation at four different crucial steps of the project (their initial involvement, after the initial consultation, three months after the design of the individualised project, 12 months after the design of the individualised project); initial interviews with managers and PES personnel involved in EQ&WL at local level; participant observation in every PES delivering the new model of intervention with weekly reports (to be delivered by e-mail to the project coordinating team), 2 national focus groups with PES managers and staff involved in the project (1 focus group for managers and one for the staff); questionnaires to be administered to SMEs involved in the project in the localities at the beginning and at the end of the experimentation.

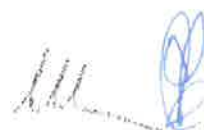
-Research background and question

Design

A quasi-experimental design will be used to test the effectiveness of the intervention EQ&WL in supporting person unemployed to find a job during the time of observation. Full random assignment will be applied.

Our independent variables are: assignment to intervention (adoption of the new model of intervention; usual model of intervention), age, gender, type of work-life balance needs (children 0-2; children 3-6; elderly to care for; people with disabilities to care for; combination of the above), the specific context of the localities chosen in the Italian regions (the four Regions have been selected considering a geographical, economic and service performance balance) and particularly the demand of labour by SMEs in the localities.

Other independent variables that we consider during the quasi-experiment by applying the comparison within the same group (experimental group and control group) are:



- other specific labour market characteristics in the region and the locality: e.g. the most required skills by SMEs;
- the attention of SMEs to work life balance issues and the impact of the raising awareness activities in the plan;
- Employability, psychological resources, the social network support of the unemployed person;
- PES personnel specific competence;
- the specific tool or tools chosen in the toolkit (e.g.: working times arrangements; smart working; childcare support; professional care for people with disability or for the elderly; adequate work-life balance support during training or re-training;...)

A researcher will conduct initial interviews with the PES Staff and PES Managers to assess the kind of work-life balance services already provided, to identify the training needs in the locality. Evidences from this preparatory investigation will be the basis to set up the training programme for the PES personnel in the locality where the toolkit will be tested. After training the researcher/trainer will follow the implementation of the project. The researcher/trainer will conduct participant observation at the PES in the locality, will interview SMEs involved in the project before their involvement and at the end of the phase to assess the effectiveness of the raising awareness plan, and will prepare periodical reports on the project implementation.

At the very end of the project one national focus groups will be held involving representatives of PES managers and staff, SMEs and people from the experimental group involved in the project.

Participants

We will recruit two groups of unemployed people experiencing reconciliation hindrances in accessing the labour market: one will receive the experimental model of intervention the second, will receive the usual intervention. Participants in the two groups will be selected to present in the same number:

- the same gender
- belong to the same age-group
- live in locality with the equal demand for labour by SMEs
- different types of reconciliation needs: children 0-2; children 3-6; elderly to care for; people with disabilities to care for; combination of the above.

A total sample of 196 unemployed people, 48 from every locality in 4 regions of Italy, will be recruited to take part in this study. Participants to the experimental group will be randomly assigned.

PES will provide the lists of potential participants based on the existing data bases.

All participants will meet the following inclusion criteria:

- i) be unemployed since more than 6 months,



- ii) having children, or being carer for elderly or for persons with disabilities,
- iii) having experienced refusal of employment or being dismissed because of their carer conditions,
- iv) be willing to be engaged in the project.

We will consider as success index the number of people who get a job within 12 months after the intervention.

-Assessment Methods and Tools

Research outcomes will be assessed adopting mixed methods, in particular by collecting information through:

- questionnaires for the unemployed persons involved in the experimentation; the questionnaires will be compiled four times at the crucial steps of the project
 - *at the beginning when the individuals are enrolled,*
 - *after the finalisation of the individually tailored intervention,*
 - *three months after the design of the individualised project,*
 - *12 months after the design of the individualised project;*
- interviews and participant observation with PES staff and PES managers
 - *initial interviews with PES managers and PES staff involved in EQ&WL in each locality;*
 - *assessment of the level of expertise achieved after training;*
 - *participant observation in every PES delivering the new model of intervention with weekly reports (to be delivered by e-mail to the responsible for evaluation);*
 - *assessment of the employability achieved by the unemployed*
- interviews with SMEs
 - *questionnaire before the involvement on the perception of the relevance of work life balance issue before the intervention and after the intervention and on the effectiveness in employee retention of work life balance policies*
 -

Finally, at the end of the project one national focus group involving representatives from PES managers and staff, SMEs and persons unemployed involved in the experimentation will be held to discuss the results.

We distinguish two focuses for the assessment and an array of relevant items around which the methodological tools will be structured. Two initial lists of items are presented below they will be refined and enriched during the initial phase of the research . They are detailed below.

i. ***First focus: the intervention model:***

PES

Level of competence of PES Staff at the beginning of the project;

Level of competence of trained PES staff;

Number of hours of training conducted.

Number of hours worked to tailor the individual project

Level of difficulty encountered in tackling the specific case (to be measured by ad-hoc Likert scales).

Unemployed person

Training and retraining needs

Reconciliation needs

Ingredients in the individually tailored project;

Cost of the individually tailored project in EUR;

Employability achieved;

Number of months awaited before getting the first job proposal;

Characteristics of the first proposal (type of contract, length of the contract,)

Number of months before getting a job proposal judged satisfactory

Characteristics of the satisfactory proposal (type of contract, length of the contract,)

Personal well being (measured in terms of work life balance achieved)

Third parties involved in the search for job opportunities:

Number of potential employers contacted

Number of individual contacts with every potential employer

Content of the contact

Descriptors of the awareness raising activities with potential employers on work-life balance

ii. Second focus: the toolkit:

For each measure in the toolkit we will investigate:

In which cases the measure was adopted.

How many times the measure was adopted.



For how long the measure was adopted.

What were the outcomes of the measure adoption.

What were the costs of the measure adoption.

Whether the measure is sustainable for the potential new employed?

Whether the adoption improved the employability of the persons who adopted it and to what extent.

-EQ&WL Testing and delivery the randomized control study

Recruitment: 48 participants will be recruited in each Region. This will take place between months 6 and 18. 8 participants will be recruited in each locality every two months (i.e., months 5, 7, 9, 11, 13, 15), with half randomly assigned to the experimental arm of the project and half randomly assigned to control arm of the project. In an attempt to match participants we will control for age, gender, level of labour demand by SMEs in the locality, reconciliation needs typology across experimental and control groups.

Participant Journey: This describes the procedures that each participant in each arm of the study will experience. Each participant will be involved in the study for a period of 12 months.

(a) *Baseline (i.e., pre-intervention) assessment.* All participants (experimental and control) will be required to undergo baseline assessment once recruited. This will involve collection of demographic information (e.g., age, sex, employment history, length of unemployment, work life balance needs), in addition to all our primary and secondary outcome measures. Research staff employed specifically for data collection purposes, will be responsible for collecting this information. They will not be directly involved in delivery of the model of intervention or of the toolkit to final beneficiaries and will not be informed of the condition to which participants have been allocated, making them blind to experimental condition.

(b) *Training:* This is only relevant to participants randomly assigned to experimental model of intervention, of which there will be 24 in each locality of each Italian region over the duration of the project. Those in the control arm, will receive standard model of intervention, as per usual. PES personnel will deliver the same model of intervention to the participants in the same group (either experimental or control) to ensure consistency in delivery.

The experimental model of intervention will require the following steps.

Step 1: First interview with potential participant and initial questionnaire to identify training/retraining needs and work-life balance needs

Step 2: Design of the individually tailored intervention to improve employability (training/re-training programme and choice of the most adequate tool to achieve the work life balance) of the unemployed person in the locality (one in each region).

Step 3: Activation of the intervention (training/re-training programme and of the tool or tools to achieve the work life balance).

Step 4: Contacts with potential employers with the support of co-applicant and associate partner employers organisations, as part of the testing SMEs will be informed of the benefits of work life balance for employers (work life balance business case), first questionnaire to the SMEs involved

Steps 5: End of the intervention programme and second questionnaire for participants.

Steps 6: Three months after the end of the intervention submission of the third questionnaire.

Steps 7: Three months after the end of the intervention submission of the final questionnaire.

Step 8: second questionnaire with the SMEs involved.

Duration: months 6-18

Outputs:

- List of select participants (testing and control group)
- List of SMEs involved
- Testing activity for 192 unemployed in 4 regions
- Testing awareness among the SMEs involved
- Testing report

Phase 3 Data Analysis

Once data has been collected from participants FGB research staff will enter these into SPSS (Statistical Package for the Social Sciences), which is the standard statistical package used in social science research of this nature. All data collection will be complete and entered by month 20 of the project. At this point analysis will be undertaken to address the research questions and predictions posed.

MANOVA (multivariate analysis of variance) will be used to analyze data as it allows researchers to determine whether a set of categorical predictor variables (e.g., allocation to experimental model or to the usual model) can explain the variability in a set of response variables (e.g., improved employability,). It is similar to ANOVA (Analysis of variance), but has the advantage of accounting for the effects of several dependent measures simultaneously, and in doing so protects against inflation of the Type 1 error rate due to multiple comparisons

and can sometimes be more powerful. As the present study has a several outcome measures (or dependent variable), this is the most appropriate analysis strategy to assess our predictions.

Data will first be screened for assumptions (e.g., multivariate normality, homogeneity of variance, linearity, and multicollinearity) before being entered into MANOVA on all y dependent measures. The treatment factors are particularly critical in this analysis, as this directly compares pre- and post-assessment scores in each treatment condition to determine whether there is a statistical improvement in employability by different types of care needs and the search and found of employment. A similar approach will be used to analyze locality effects (from different regions). In line with our predictions, results of these analyses will allow us to determine: (a) whether employability has improved as well as effective employment (b) whether the participants in the new model of intervention show greater improvement than participants in the standard one.

Secondary analyses relevant to gender effects are also planned. Although we will try to control for effects of gender by matching participants at the point of recruitment, there will be fundamental differences between men and women in the request for work life balance tools.

Duration: months 19-22

Outputs:

- Report detailing the findings of the social intervention. This will outline the purpose, findings, and project implications and be used for the purposes of project evaluation.

Phase 4 Monitoring and Evaluation

Monitoring activities involve all project steps as well as an evaluation of the EQ&WL toolkit in terms of its transferability, cost-effectiveness, and feasibility, and quality of the research will run in parallel with research activities. The monitoring and evaluation process will be conducted and supervised by one of the partners - FGB - with wide experience in evaluation methodologies and practices of social researches and studies. FGB will indicate one senior researcher – Silvia Sansonetti – whom will be dedicated to monitoring and evaluation with no involvement in other project activities.

Project managers and scientific coordinators, as well as the rest of the project staff, throughout the entire process of the project, will support her. She will involve stakeholders in order to accumulate and share the knowledge needed for drafting and implementing the up-scale strategy.

The monitoring system will include design, preparation of materials, recruitment of participants, the intermediate steps of the entire participants' journey, data treatment, results delivery, measures to ensure ownership and scale up in case of success—especially the activities aimed at Stakeholders.

Two Intermediate Monitoring Reports will be delivered at month 8 and 16 of the project lifespan, and a Final Monitoring Report will be delivered at month 20 of the project.



The evaluation will address the following elements: *merits and implementation of the study; cost effectiveness; transferability and up-scaling; feasibility*. The evaluation will combine analyses of the data collected throughout the study, of the information collected through the monitoring system, and data gathered through original research by the evaluator. While the results will be utilized in the final phase of the project, during the up-scaling and dissemination process, evaluation activities will start since the beginning of the project and last throughout the timeline of the project.

An Intermediate Evaluation Report will contain the results of the evaluation process at month 12, aimed to readjust if needed the social experiment using also the monitoring data and results.

At the end of the intervention the Ex-Post (Final) Evaluation Report will be delivered, including an assessment of the possibility of extending the intervention to the wider regional population;

Duration: Months 1-24

Outputs:

Two Intermediate Monitoring Reports

Intermediate Evaluation Report

Final Monitoring Report

Ex Post (Final) Evaluation Report

Phase 5 Dissemination and Up-scaling Strategy

Phase 5 will be devoted to setting up appropriate strategies for up-scaling the proposed model and toolkit and for disseminating it to a wider audience. First of all, the strategy recalls on the importance of having a heterogeneous partnership that not only lends the project stability in delivery terms, but provides a breadth of perspectives, external links, channels of access and credibility with multiple external up-scaling audiences.

It will be key for the involved project partners to drive an on-going and well crafted outreach and communication during the project for it to succeed, therefore we propose the creation of a Communication and Awareness-Raising Strategy. It's main parts are described in the below section. The Strategy will be built upon two separate, but closely linked, parts. It's aim is to describe how the objectives of the project will be met and support the coordination of the various activities. These are: the internal project communication, and the external awareness-raising outreach.

-Identification of the Goals of Communication

In a long terms project, such as the current proposal, it is important to set communication goals at the commencement of the activities, that will support the project management team in making decisions in terms of the key milestones, and daily operation, of the project communication. It is also crucial to set up communication metrics and general expectations in alignment with the

overall goal of the project. Regarding the identification of the project goals we propose the following steps to include:

- Keeping project partners (lead and co-applicants) informed about timelines, key milestones, deadlines and possible needs.
- Highlighting possible roadblocks or joint decisions to make (coordinating decision making via online platforms, such as Doodle, or online voting)
- Setting up regular project meetings (online and offline), or forums (i.e. LinkedIn or closed Facebook groups) to communicate and share information or discuss possible questions.
- Providing access to key project documentations through online drives or file sharer platforms

-Project Communication Plan - Stakeholder information and communication preferences

The joint understanding and common ground gained from the establishment of the project communication goals is then used to set up a project Communication Plan. A well-defined plan will support the timeliness and consistency of the project, and contribute to deliver objectives on time. The document should outline how strategic discussions on the key deliverables will be organised, through which communication channels, and how the project team will handle technical conversations, or measure the effectiveness of their work. The below table is to show an example extract of the planned project Communication Plan.

Role	Frequency	Format / Channel	Notes	Activity measured
ANPAL (Lead Applicant)	Daily communication Fortnightly progress update reports	Updates via email (CC) Monthly meetings (face to face, Skype or call meeting)	Go to information place, handles project related questions, pulls in partners as needed etc. In charge of minutes taking, agenda etc.	Attendance at meetings Feedback gathered in one-on-one discussions Turnaround time on decisions the project team needs to make
Italian National Partnership (co-applicant)	Monthly and Major Milestones (project kick-off, project close-out meeting)	Emails (CC) Monthly meetings (face to face, Skype or call meeting)	Involved in decision making concerning major milestones	Attendance at meetings Feedback gathered in one-on-one discussions
Transnational Partnership (co-applicant)	Monthly and Major Milestones (project kick-off, project close-out meeting)	Emails (CC) Monthly meetings (face to face, Skype or call meeting)	Involved in decision making concerning major milestones	Attendance at meetings Feedback gathered in one-on-one discussions

the WorkLife HUB (co-applicant in charge of EU level awareness raising and dissemination)	Weekly Major Milestones	Updates via email (CC) Monthly meetings (face to face, Skype or call meeting) Newsletters with updates on the project progress Blogging and social media presence	Go to place in terms of project communication Involved in decision making concerning major milestones	Attendance at meetings (i.e. stakeholder identification) Turnaround time
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-Communication Types

The Communication Plan will include a section on the categories of preferred communication types over the course of the project. This section details how communication will be shared, what information and documentation will be included, who will be involved from the project partners.

Weekly Check-Ins / Email reports: weekly phone calls, email reports, or online discussions between the project coordinator and main / relevant co-applicants to go over progress, questions, logistics and divide any related workload. Documents to be shared: timelines, budget, upcoming list of deliverables, next steps, to do lists, any further project documentation etc.

Major milestone meetings: meetings planned for presentations of progress, and delivery of deliverables. Documents to be shared: agenda of the meetings, logistics, background documents, discussion questions, upcoming deliverables, project documentation, agendas of previous meetings etc.

Daily emails: assistance by the project coordinator on project related questions such as budget, deliverables etc.

-Target groups and multipliers

All of the co-applicants will be actively involved in the communication and dissemination of the project process, of its successes and lessons learnt, as well as its milestones. Also, they will be primarily responsible for identifying the key influencers (media, universities, professional networks, EU level umbrella organisations etc.), multipliers in their own countries or regions. All involved Italian agencies will be tasked to reach out to, and optimize their relationship with, their respective networks (i.e. local newspapers, formal and informal business networks, social partners etc.), which will be a critical success factor in the outcome of the project.

The WorkLife HUB will conduct the European level outreach and awareness-raising activity. The organisation will be in charge of EU level stakeholder mapping, running of a stakeholder identification workshop, identification of key influencers in the work-life balance spectrum, and prioritizing between stakeholders. It is also notable, that new stakeholders and multipliers tend to emerge after the project kick-off, and we will be putting specific emphasis on continuous analysis and prioritization.

One of the key success factors of delivering an effective project is the ability to which the involved partners (co and lead applicants) can bring, and influence, groups of people together to share ideas, exchange information, get engaged and generate solutions to challenging issues. In the current project these target segments will be grouped around a smaller and a larger circle. In figuring out the target groups and key multipliers of the project it will be important for the involved parties, and implementers of the Communication Plan, to understand what groups and network can deliver what messages to the most effective way to which audience. Comprehensively understanding the targeted audience (target groups) of the project should ensure that all communication activities are adequate.

In terms of the smaller circle we will be aiming to reach out to and inform the following local and regional groups, individuals, about the project, get interest and drive engagement:

- Regional and local employment and social affairs administration offices
- Social Partners at the local level (Chamber of Commerce offices, Employers (public, private and non-profit) in the involved countries, Trade Unions)
- Specialised bodies representing employers, certain businesses, HR associations
- Specialised Bloggers and social media influencers, journalists
- Social partners, trade unions
- Local Media Agencies
- Other organisations (local banks, local job agencies, consumer associations, trade agencies, owners associations etc.)

The larger group will include the same relevant organisations, but at the European, EU Member States and international level:

- EU Governments and administration offices (Ministries, tax offices, government agencies, statistics offices, social security and pension funds, health care institutes, other public services)
- EURES Members and Partners (EURES Crossborder partners; Interregional labour market organisations, Employment Services)
- EU level social partners and their representation offices (BusinessEurope, ETUC, UEAPME, EUROCIETT, Euro Cities etc.)
- Labour Market Research Institutes
- HR Associations
- International research bodies such as OECD, ILO etc.
- European Institutions and Bodies: European Parliament, EIGE, Eurofound, EU OSHA etc.
- Equality bodies, and national organisations for gender equality
- EU and national level media agencies (radio, TV, online news agencies, journalist, thought-leaders)
- ENWHP - European Network for Workplace Health Promotion
- EIB - European Investment Bank
- IMF - International Monetary Fund
- UN Women - United Nations Entity for Gender Equality and the Empowerment of Women
- WHO - World Health Organization
- Trade conferences, events, fairs etc.
- Other organisations (trade associations, banks, consumers' and users' organisations etc.)

-Development of key messages



At the beginning of the project we will be identifying key messages (long and short versions, list of frequently asked questions) which should form an integral part of the entire Strategy. It's aim is to ensure the delivery of consistent messages over the course of the project.

-Distribution channels/tools

We will be using a mix of communication tools to ensure that they meet the needs of the overall strategy and deliver to the targeted audience. These are:

- Press releases to share and celebrate the starting of the project, its relation to the broader EU agenda, the funding source, the co-applicants involved, as well as celebrating the main milestones of the project (we will be distributing this to the official media contacts, specialised news agencies following small business, journalists, social media influencers, work-life balance and HR bloggers etc.)
- Interviews in specialised magazines, TV or print, to share the ongoing work and experimentation with the targeted audience.
- Monitor specialised transnational and Europe-wide events, where we can share the content (video, written or audio) related to the project, get invited to speak about the project, for instance, work-life balance forums, HR events, small business events, specialised conferences of Eurofound, the OECD yearly Forum, EIGE, HR associations, employment agencies, business forums, chamber of commerce events ...etc. at national, local and European level.
- On-going distribution information on the project through blogs, partner newsletters, social media etc. The co-applicant organisations have specific web-pages, which already have garnered a large readership, and thus we will be using their websites. Moreover, all involved organisations have a well established email newsletter readership (outreach is in the tens of thousands) so we will be distributing information through these weekly/monthly bulletins. We will specifically look out for opportunities to include the project in work-life balance or future of work related magazines and publications (newsletters of social partners, or universities such as the ADAPT Bulletin), so to enlarge our outreach.
- The WorkLife HUB is producing a related podcast series, the WorkLife podcast. We will produce special episodes, that will give an up-date on the project milestones, discuss specific thematic aspects, and which can be spread as widely as possible. The podcast has currently listeners from over 25 countries, and their number is close to 10 000.
- Once the testing phase of the project is finalised, the findings will be edited and showcased in a research findings publication, which will be available online, with a limited number of printed copies, only in English. It will include the analyses of data and the before/after situation, the changes in behaviour, the successes, the best practices, some case-studies to take the readers through the process.
- At the very end of the project we will be organising a 1-day conference in Italy to share the findings with the broader stakeholder base, to also highlight the work of the Italian national agencies, to invite some of the most successful institutions that have applied and benefited from the approach.



Communication can be done through various channels, and the main goal of the coordinators (the WorkLife HUB, lead and some of the other co-applicants) of the project communication activities will be to choose appropriately from the available and constantly changing options. Therefore, in selecting media channels, through which all project related communication can be done we will prioritize those that offer interactivity (LinkedIn or Facebook groups, Twitter hashtags etc.) with both the project co-applicants, and external stakeholders. Moreover, with the setting up of the project own social media channels we will be making sure to create short feedback loops with interested stakeholders and the public, increase the level of interaction and engagement, access key decision makers and connect with other social and business groups in various geographical locations.

To decrease the level of pitfalls and emphasise privacy and data protection related questions, when communicating, the project communication team will put in place preventive measures and guidelines on, for example, how to handle negative comments.

-Awareness-Raising and Dissemination

Through the project' awareness-raising activities, initiated right from the beginning of the project, our focus will be to make the different parts of the project known, in a tailored way, to the previously defined target groups. In this way, interested organisations and stakeholders will be enabled to use, and experiment with, the intermediary results in their own work. Dissemination activities will be started in the introductory phase through the development of specific materials and tools for earlier identified target groups. These documents and tools are to provide a solid foundation to build further on the awareness-raising and communication activities. The motivation for this is to raise awareness at the very beginning of the project, engage with interested stakeholders, target groups and the general public. In the later part of the project the focus will change into communicating about results and the impact of the activities.

-Experience sharing, and transferring of results, between different employment agencies of the EU Member States

The project is built as a foundation for future scaling and rolling out of the methodology and toolkit in other EU countries. The involved co-applicants are driven by the mission to make work-life balance: the combination of meaningful work with quality family and private life a reality to as many people as possible.

We want to ensure, that the final product is as solid as possible, as progressive, as pragmatic and applicable to as many realities (employer, country, sector) as possible.

This is why we will put special emphasis on the peer-learning, the sharing of challenges, opportunities and celebrate successes and collect the testimonials of the participating employment agencies and other organisations.

Already during the project we will be working with European level multipliers, who will ensure that the project is known and recognised beyond the borders of the participating countries. This will make the rolling out to other countries and employers straight forward.

Duration: months 3-24

Outputs:



- Project visual identity and information material (IT, UK)
- Awareness Raising and Up-scaling strategy
- National Stakeholder's Events (two per countries)
- Final Report (IT, EN)
- Final Conference

Phase 6 Project management

In order to ensure a smooth and effective implementation of project activities, the applicant, in parallel to ordinary project management and coordination tasks (such as overall project coordination, including contacts with partners, administration issues, liaison with the European Commission) has envisaged a series of specific project management activities that will run in parallel to the implementation of the phases outlined above. These tasks can be summarised as follows:

a) Setting up of the Steering Committee

Given the innovative nature of the action and in order to fully exploit the specific capacity and competence of partners in the field of work life balance, a Steering Committee (SC) will be constituted with the aim of providing technical guidance for the advancement of project activities and to ensure quality of results. The Committee will be composed by one representative per partner (applicant + co-applicants), it will be chaired by applicant, ANPAL. The Steering Committee will meet three times during the implementation of the project, in conjunction with project events. Teleconferences or Skype meetings will be held whenever necessary and at least once a month.

b) Steering Committee Meetings

Within the first month from the start of project activities, a kick off meeting will be organised with SC members. The purpose of this first meeting is also to present and to jointly agree on project management and organisation activities, financial and administrative issues, logistics, etc.

In addition, during the kick-off meeting, SC members will discuss about the toolkit framework, the training package, criteria for the identification of participants to piloting phase.. The SC will discuss the research's structure and activities as outlined in this proposal and further detailed by the applicant prior to the meeting, and draft the guidelines for its organisation. SC members will make proposals for the participation of Associated partners in different phases of the project.

In the light of project results, findings and advancement, participants will be in a position to discuss the possibility to undertake any necessary remedial action or to fine-tune project methodology.

Two other steering committee meetings will take place in parallel with other project events. In particular, the 2nd SC meeting will be organized in Rome in parallel with the Transnational

Stakeholders' Meeting (month 12); the 3th SC meeting will also take place in Rome, in parallel with the final conference.

Duration: months 1-24

Outputs:

- Steering Committee set up
- 3 Steering Committee meetings
- Internal communication strategy
- Intermediate report
- Final report



Gantt chart: timeframe and activities

Phase	Description	Partners involved*																												
			1	2	3	4	5	6	7	8	9	0	1	1	1	1	1	1	1	1	1	2	2	2	2	2	2			
1	Project start & set up																													
1.1	Kick off Meeting	ANPAL + ALL																												
1.2	Toolkit development	ANPAL + FGB + CGM + WLB HUB+ IWEO + REFORM + associated partners																												
1.3	Training PES staff on the use of the toolkit	ANPAL+ FGB + Associated regional partners																												
1.4	Creating local networks for service delivery	ANPAL+ FGB + Associated regional partners																												
2	Testing EQ&WL toolkit																													
2.1	Toolkit piloting	ANPAL + Regional Associated partners + CGM																												
3	Data Analysis	FGB																												
3.1	Data screening	FGB																												
3.2	Data analysis & interpretation	FGB																												
4	Project Monitoring and Evaluation	FGB																												
4.1	Monitoring and evaluation reports	FGB																												
5	Dissemination and Up-scaling Strategy	WLB HUB (EU dissemination)+ FGB																												

		(national dissemination + all)		
5.1	Project visual identity	FGB		
5.2	Online Social Package	FGB + all		
5.3	National Stakeholders Events	ANPAL + associated partners		
5.4	Transnational Stakeholders Meeting	ANPAL + all		
5.5	Toolkit guide elaboration	FGB + all co-applicants		
5.6	Final Report	FGB + all co-applicants		
5.7	Final Conference	ANPAL + all		
6	Project Management	ANPAL + all co applicant project managers		



2. Work plan and responsibilities

Provisional Dates & Location	Description of activities	Outputs	Organisation responsible
(12) December 2018 Rome (IT)	Phase 1: Project Start up Kick-off meeting	Minutes	ANPAL with the participation of all the consortium
(12) December 2018 Rome (IT)	Phase 6: Project management	1 st Steering Committee meeting in conjunction with Kick-off meeting	ANPAL with co-applicant project managers
February 2019	Phase 6: Project management	Internal communication strategy	ANPAL with co-applicant project managers
April 2019	Phase 1: Project Start up	Toolkit framework and outline (EN, IT)	CGM, WLB Hub, REFORM, UIL, FGB with the support of Regional Associates
April 2019	Phase 1: Project Start up	Training Materials	FGB
April 2019	Phase 1: Project Start up	Business case for Work Life balance in SMEs and raising awareness activities plan	CGM, IWEO
April 2019	Phase 1: Project Start up	Research procedures and manual for project delivery	ANPAL, FGB,
April 2019	Phase 1: Project Start up	Local network for work life balance services delivery	CGM with the support of Regional Associates?
July 2019	Phase 4: Monitoring and Evaluation	1 st Interim monitoring report	FGB
November 2019 Rome (IT)	Phase 2: Testing EQ&WL toolkit Interim Transnational Stakeholders' meeting	Minutes	ANPAL with the participation of all the consortium
November 2019 Rome (IT)	Phase 6: Project management	2 nd Steering Committee meeting in conjunction with Interim Transnational Stakeholders' meeting	ANPAL with co-applicant project managers
November 2019	Phase 4: Monitoring and Evaluation	Intermediate Evaluation Report	FGB
November 2019	Phase 6: Project management	Interim Report	ANPAL with co-applicant project managers
March 2020	Phase 5: Dissemination and Up-scaling Strategy	National Stakeholders Event	ANPAL + associated partners
March 2020	Phase 4: Monitoring and Evaluation	2 nd Interim monitoring report	FGB
May 2020	Phase 2: Testing EQ&WL toolkit	List of selected participants (testing and control group)	ANPAL with CGM and Regional Associates
May 2020	Phase 2: Testing EQ&WL toolkit	List of SMEs involved	ANPAL with CGM and Regional Associates
May 2020	Phase 2: Testing EQ&WL toolkit	Testing activity for 192 unemployed in 4 regions	ANPAL with CGM and Regional Associates
May 2020	Phase 2: Testing EQ&WL toolkit	Testing awareness among the SMEs involved	ANPAL with CGM and Regional Associates
May 2020	Phase 2: Testing EQ&WL toolkit	Testing report	ANPAL with CGM and Regional Associates
July 2020	Phase 4: Monitoring and Evaluation	Final Monitoring Report	FGB
July 2020	Phase 5: Dissemination and Up-scaling Strategy	National Stakeholders Event	ANPAL + associated partners

September 2020	Phase 3: Data Analysis	Report detailing the findings of the social intervention (outline of purpose, findings and project implication, to be used for purposes of project evaluation)	FGB
September 2020 Rome (IT)	Phase 5: Dissemination and Up-scaling Strategy Final Transnational Conference	Minutes	ANPAL with the participation of all the consortium
September 2020 Rome (IT)	Phase 6: Project management	3 rd Steering Committee meeting In conjunction with Final Transnational Conference	ANPAL with co-applicant project managers
November 2020	Phase 5: Dissemination and Up-scaling Strategy	Project visual identity and information material (IT, EN)	FGB
November 2020	Phase 5: Dissemination and Up-scaling Strategy	Awareness Raising and Up-scaling strategy	WLB Hub + ANPAL
November 2020	Phase 5: Dissemination and Up-scaling Strategy	Final Report (IT, EN)	FGB + Co-applicants
November 2020	Phase 6: Project Management	Final Report	ANPAL with co-applicant project managers

Signature of the Legal representative

[Handwritten signature] ANPAL

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