

REPUBLICATION (5th)

Notice of Call

INVESTMENTS

RE-C05-i01.01 – Mobilising Agendas/Alliances for Reindustrialisation

RE-C05-i01.02 – Green Mobilising Agendas/Alliances for Business Innovation

NOTICE No. 02/C05-i01/2022

Invitation to submit Final Proposals for the Development of Projects under the Mobilising Agendas for
Business Innovation

(amendment to the payment conditions to beneficiaries – point 11)

Final Proposals Competition

Ministerial Order No 43-A/2022 of 19 January

22 February 2023

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1. Context

The Recovery and Resilience Plan (RRP) sets out a range of investments and reforms intended to contribute to the following dimensions: resilience, climate transition and digital transition. In this context, Component 5 – Business Capitalisation and Innovation, integrated within the Resilience dimension, aims to enhance the competitiveness and resilience of the economy based on research and development, innovation, diversification and specialisation of the productive structure.

This Component includes the Mobilising Agendas for Business Innovation and the Green Agendas for Business Innovation.

Notice No. 01/C05-i01/2021 – Call for Expressions of Interest for the Development of Projects under the Mobilising Agendas for Business Innovation defined the framework of the Mobilising Agendas, as well as their objectives and contribution to the overall objectives of the RRP. It also defined the thematic areas within which investments should, indicatively, be framed, the types of projects and investments to be supported, the geographical area of application, and a set of conditions to be complied with.

The proposals submitted as Expressions of Interest (Phase I) were assessed by the Agenda Coordination Committee (ACC), and the selected proposals were invited to submit applications for funding, under the specific terms and conditions set out in this Notice, which aims to regulate the support to be granted under Phase II – Calls for the submission of funding applications consisting of final proposals.

Applications for funding based on final proposals must comply with the essential principles set out in the respective selected Expression of Interest and must pursue the same objectives, including the defined targets and indicators, types of projects and investments, and consortium leadership.

Without prejudice to the above, changes may be introduced in the final proposals in relation to what was presented in the Expressions of Interest, namely a new composition of the consortium and adjustments to the investment plan, among others. The inclusion of new entities in the consortium may take place provided that the members initially foreseen in the Expression of Interest remain responsible for the majority of the investment.

However, the set of changes may not distort the approved Expressions of Interest; that is, the proposal must pursue the same objectives in terms of new products and services and comply with the types of investment initially presented, without prejudice to exceptional changes duly justified in the final proposal and subject to an assessment of their relevance to the objectives of the Agenda by the ACC.

The public information disclosed at the time of the presentation of the results of Phase I enables the various consortia to actively seek synergies among the selected Expressions of Interest, to be incorporated into the final proposals. In this context, the creation of synergies resulting from the aggregation of selected Expressions of Interest into a single final proposal will be particularly valued, provided that it reflects greater leverage of investments in relation to the proposed objectives.

This Notice falls within the scope of Regulation (EU) 2021/241 of the European Parliament and of the Council of 12 February 2021, and of Portugal's Recovery and Resilience Plan, under Component 5 – Business Capitalisation and Innovation, as well as of the Regulation of the Incentive System "Agendas for Business Innovation", approved by Ministerial Order No. 43-A/2022 of 19 January 2022.

2. Types of projects

The Mobilising Agendas for Business Innovation are collaborative projects that enable the leveraging of the development of new products, services and solutions, with high added value and the incorporation of knowledge and technology, accelerating the structural transformation of the Portuguese economy and improving its specialisation profile. This is achieved through the formation of robust and structuring consortia that ensure the development, diversification and specialisation of national value chains, while pursuing objective targets in terms of exports, qualified employment and investment in R\&D, as well as addressing the challenge of the green transition towards environmental sustainability.

Projects must fall within the following typologies:

- Innovation Pacts, as defined in point (d) of Article 2 of the Regulation of the Incentive System "Agendas for Business Innovation", annexed to Ministerial Order No. 43-A/2022 of 19 January.
- Mobilising Projects of Innovation Agendas, as defined in point (e) of Article 2 of the Regulation of the Incentive System "Agendas for Business Innovation", annexed to Ministerial Order No. 43-A/2022 of 19 January.

3. Nature of the Beneficiaries

The beneficiaries of the support provided under this Notice are the entities identified in Article 6 of Ministerial Order No. 43-A/2022 of 19 January, which must form a consortium in accordance with the provisions of Article 7(2) of that Ministerial Order, and in a manner that complies with the project eligibility criteria and the obligations of beneficiaries defined therein, in particular in Articles 8 and 18, respectively.

4. Access conditions

The access conditions applicable to beneficiaries and projects are those set out in Articles 7 and 8 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January, and projects must additionally comply with the following conditions:

- a) Refers to an Expression of Interest submitted under Notice No. 01/C05-i01/2021 that obtained an eligible and selected decision;
- b) Comply with the general and specific recommendations identified in the individual assessment made available through the notification of the decision on the Expression of Interest;
- c) Fall within the objectives and priorities defined in the present Notice;
- d) Comply with the “Do No Significant Harm” (DNSH) principle, not including activities that cause significant harm to any environmental objective within the meaning of Article 17 of Regulation (EU) 2020/852 of the European Parliament and of the Council (EU Taxonomy Regulation), in accordance with the list of excluded activities set out in Annex A;
- e) Comply with applicable environmental legislation at national and European Union level;
- f) Include all information required for the purposes of processing the application, in accordance with the present Notice, and comply with the conditions and deadlines laid down therein;
- g) For the purposes of verifying SME status, undertakings must obtain or update the corresponding Electronic Certification provided for in Decree-Law No. 372/2007 of 6 November, as amended, through the website of the Agency for Competitiveness and Innovation, I.P. (IAPMEI) at www.iapmei.pt;
- h) Submit, together with the application, a draft consortium agreement in accordance with the reference framework available in Annex B, specifying the scope of cooperation between the participating entities; the identification of the consortium leader, who shall be responsible for ensuring overall project coordination and acting as the interface with the various beneficiaries and between them and IAPMEI; as well as joint liability between the parties, in particular with regard to contributions to project costs, risk and results sharing, dissemination of results, and industrial property rights.
- i) Verification of compliance with point (c) of Article 7 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January, may be reported up to the decision stage following the conclusion of the negotiation process provided for in point 8 of the present Notice.

5. Conditions for the granting of funding

The conditions for the granting of funding shall be those set out in Article 11 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January.

In addition to the provisions set out in Article 21 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January, and within the scope of the categories “Regional aid” and “Aid for innovation clusters”, the maximum aid intensities and/or bonuses shall be those laid down in the new Regional Aid Map for the period 2022–2027, to be approved by the European Commission pursuant to the Guidelines on regional State aid, adopted by Commission Communication C(2021) 2594 final of 19 April 2021.

Business entities shall be subject to the rules and maximum thresholds defined in the applicable State aid frameworks, as set out in Annexes C and D. In exceptional cases, where projects exceed the thresholds referred to in Annex D, they shall be subject to individual notification to the European Commission (EC), and their approval shall depend on a decision to be issued by the EC.

Support granted under this Call for Proposals shall not apply to:

- a. The primary agricultural production sector, animal production, hunting and forestry sectors, with the exception of aid for consultancy services in favour of Small and Medium-Sized Enterprises (SMEs), aid for research and development, aid for environmental protection, innovation aid for SMEs, and aid for disadvantaged workers and workers with disabilities;
- b. The fisheries and aquaculture sector, with the exception of training aid, aid for research and development, innovation aid for SMEs, and aid for disadvantaged workers and workers with disabilities;
- c. Aid granted by the public employment service responsible for the implementation of employment and vocational training policy, where such aid is excluded under European competition rules on State aid.

For non-business entities that are not subject to State aid rules, support shall amount to 100% of the eligible expenditure resulting from the negotiation process provided for in point 8.

Non-business entities that carry out both economic and non-economic activities, in order to benefit from the aid intensity provided for in Article 11(2) of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January, must ensure a clear separation and appropriate accounting treatment of the costs, funding and revenues relating to each activity¹.

¹ For ease of assessment of the situation of each entity, the guidance note available at https://www.compete2020.gov.pt/Auxilios_Estatais_IDI may be completed.

Support may take other forms and aid intensities as a result of the negotiation process provided for in point 8 of the present Notice.

In addition to the targets proposed by the Agenda under Annex E, the Operational Arrangement signed with the European Commission, which governs the implementation of the Recovery and Resilience Plan (RRP), establishes the number of new products, services and systems to be achieved by Portugal by 31.12.2025. Accordingly, the PPS contractually agreed under each Agenda must be completed by 31.12.2025.

The indicated targets (PPS) shall be subject to monitoring at the end of 2025.

Partial or total failure to comply with the project's targets and objectives may result in a reduction or revocation of the granted support.

6. Eligible and non-eligible expenditure

6.1 Eligible expenditure

Eligible expenditure shall be that set out in Article 9 of the Regulation of the Incentive System "Agendas for Business Innovation", annexed to Ministerial Order No. 43-A/2022 of 19 January.

Indirect costs, where provided for as overheads under the GBER aid categories, shall be calculated on the basis of simplified cost options, applying a flat rate of 25% of total eligible direct costs, excluding eligible direct costs relating to subcontracting, financial support to third parties and unit costs or lump sums that include indirect costs, in accordance with Article 20 of Commission Delegated Regulation (EU) No 480/2014 of 3 March, and Article 35 of Regulation (EU) 2021/695 of the European Parliament and of the Council of 28 April 2021, establishing Horizon Europe.

Costs related to vocational training shall be determined using simplified cost options, under the standard scale of unit costs modality, in accordance with the Decisions of the CIC Portugal 2020.

Other simplified cost options may also be adopted, in accordance with methodologies defined for that purpose within the framework of the implementation of the European Structural and Investment Funds, where they are demonstrated to be appropriate to the nature of the expenditure and the beneficiaries.

All remaining eligible expenditure shall be determined on the basis of real costs and must be justified by paid invoices or other accounting documents of equivalent probative value.

NON OFFICIAL TRANSLATION – NON CONFIDENTIAL

Applications submitted must comply with the provisions laid down in the Regulation of the Incentive System “Agendas for Business Innovation” with regard to the start of works, and expenditure shall be considered eligible from the date of submission of the approved Expression of Interest under Notice No. 01/C05-i01/2021, with respect to the entities originally forming part of the consortia and to the investments provided for in the Expression of Interest.

The deadline for the submission of expenditure is 30.06.2026.

6.2 Non-eligible expenditure

Non-eligible expenditure shall be that identified in Article 10 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January.

7. Selection criteria for the operations to be funded

Applications deemed admissible shall be evaluated on the basis of the criteria set out in Article 15 of Ministerial Order No. 43-A/2022 of 19 January:

- A. Degree of innovation or differentiation;
- B. Impact of the project on business competitiveness and on changing the country’s productive specialisation profile;
- C. Potential impact on the region where the project is implemented;
- D. Investment leverage capacity;
- E. Potential for economic valorisation of innovation and scalability;
- F. Contribution of the project to carbon neutrality and energy resilience;
- G. Quality of the consortium in terms of the promoters’ competencies in relation to the project objectives and the consortium governance model;
- H. Economic and financial viability of the projects and of the applicants.

The scoring of the selection criteria shall be carried out in accordance with the evaluation framework set out in Annex F.

The final classification (FC), for ranking purposes, shall be calculated in accordance with the following weightings, depending on the type of Agenda:

- I. Mobilising Agendas for Business Innovation

$$FC = 0.15 \times A + 0.20 \times B + 0.05 \times C + 0.10 \times D + 0.20 \times E + 0.10 \times F + 0.10 \times G + 0.10 \times H$$

II. Green Agendas for Business Innovation:

$$FC = 0.10 \times A + 0.15 \times B + 0.05 \times C + 0.10 \times D + 0.20 \times E + 0.20 \times F + 0.10 \times G + 0.10 \times H$$

8. Procedures for the analysis and decision of applications

Applications shall be examined and selected by the Agenda Coordination Committee (CCA), composed of IAPMEI – Agency for Competitiveness and Innovation, I.P. (IAPMEI), which acts as coordinator, the National Innovation Agency, S.A. (ANI), the Agency for Investment and Foreign Trade of Portugal, E.P.E. (AICEP), the Managing Authority of the Operational Programme for Competitiveness and Internationalisation (COMPETE 2020), and the Foundation for Science and Technology, I.P. (FCT), pursuant to Order No. 9350/2021, published in the Official Gazette (DR) No. 186/2021, Series II, of 23 September.

The assessment of applications shall be carried out by the CCA by establishing a final classification and ranking the applications according to the merit of the projects and the defined budget allocation, taking into account:

- I. The technical assessment carried out by a jury composed of national and international personalities of recognised merit and competence, and the negotiation process with the applicants.

The jury, having regard to the evaluation criteria defined in point 7, in particular criteria A, B and E, shall carry out the technical assessment of the final proposals, issuing an opinion on the following aspects:

- The innovative character and its strategic relevance for changing the productive specialisation profile or for transforming relevant value chains of the new products and services to be placed on the market;
- The consistency of the R&D activities to be carried out for the creation of the knowledge necessary to achieve the proposed objectives in terms of the effective placement of new products and services on the market;
- The consistency of the proposed objectives in terms of increases in turnover and Gross Value Added in relation to the proposed investment.

The jury may issue recommendations to the CCA to be taken into account in the negotiation process and/or in the assessment and decision of the proposals.

- II. The assessment by the CCA of the selection criteria set out in point 7, taking into consideration the technical assessment carried out by the jury, with a particular focus on the above-mentioned criteria, with applications obtaining a favourable assessment where they:

- a) Comply with the requirements defined in point 4;
- b) Obtain a classification of at least “Good” in all criteria;
- c) Achieve a minimum final classification of 4.00 points.

Applications obtaining a favourable assessment shall be ranked in descending order of classification by type of Agenda, namely Mobilising Agendas for Business Innovation or Green Agendas for Business Innovation, and shall be pre-selected for the negotiation process, up to the limit of the budget allocations provided for in point 12.

- III. The pre-selected Agendas may be subject to a negotiation process, conducted by the CCA, taking into account the jury’s recommendations and the CCA’s assessment regarding the need to delimit the eligibility of investments, assess the relevance of investment components or consortium entities to the objectives of the Agenda, and which may lead to the establishment of different forms and conditions of support, including lower aid intensities and adjustments to targets and objectives.

Following the assessment, taking into account the forms and conditions of support resulting from the negotiation process, the selection of applications to be supported shall be subject to an opinion of the CCA, having regard to their position in the ranking, up to the limit of the allocations indicated in point 12 of the present Notice.

In the event of a tie in the final score, the tie shall be broken by the higher score under criterion B and, if necessary, by the lower total amount of investment proposed in the application.

Where final proposals with overlapping areas of intervention are identified, the CCA may select only those that demonstrate relevant impacts on the transformation of value chains or on the productive specialisation profile of the economy, taking into account their final classification and ranking position.

The CCA may include, in its opinion, approval conditions and specific obligations to be complied with by the Consortium.

Applications shall be decided upon by IAPMEI within 40 working days from the deadline set out in point 9, with this period being suspended during the negotiation process, where applicable.

9. Procedures for the submission of applications

The submission of applications shall be carried out by the lead company of the consortium, through an electronic form accessible via the IAPMEI website (<https://www.iapmei.pt/PRODUTOS-E-SERVICOS/Incentivos-Financiamento/Sistemas-de-Incentivos/Plano-de-Recuperacao-e-Resiliencia/Agendas-para-a-Inovacao-Empresarial.aspx>).

In order to submit an application, it is mandatory that all co-promoters have completed registration and authentication on the PT2020 Incentives System platform for companies (Balcão 2020).

The application (final proposal) must include a Technical Annex containing the Project Descriptive Memorandum, drafted in the English language, in accordance with Annex E, with a maximum length of 165,000 characters, to be uploaded in the application form.

A draft consortium agreement must also be submitted (by upload), under the terms referred to in Point 4 of the present Notice.

For non-business entities that simultaneously carry out economic and non-economic activities, the status of the activity must be previously registered in PAS (Simplified Access Platform), in accordance with the guidance note on compliance with State aid rules, duly completed²².

The final proposal application form (beneficiary data section) validates the status relating to Economic Activity.

The deadline for the submission of final proposals is 18:00 on 13 April 2022.

10. Contracting of the granting of support to the Final Beneficiary

The formalisation of the granting of support shall take the form of an acceptance term, signed by the representative mandated under the consortium agreement, in accordance with Article 16 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January.

The consortium agreement, duly signed by all co-promoters, shall form an integral part of the acceptance term.

11. Payment conditions for Final Beneficiaries

²² https://www.compete2020.gov.pt/admin/images/checklist_Auxilios_IDI_RECI.pdf

Payments of support may be made through:

- I. Interim payments of up to 95% of the contracted or executed incentive, in the form of:
 - i. An initial advance for pre-financing, up to a maximum amount of 13% of the incentive value, and an additional advance of 10%, 40 days after the date of the decision granting the initial advance. The advances received shall be offset by deduction, in each subsequent payment, of an amount calculated based on the percentage resulting from the ratio between the amount determined for interim payments and the total contracted financing;
 - ii. Payments against invoices, in proportion to the invoiced expenditure, the settlement of which shall be made within a period of 30 days; or
 - iii. Reimbursement in proportion to the expenditure incurred and paid.
- II. Final payment of the remaining amount in view of the expenditure executed, to be submitted within 90 days following the physical and financial completion of the project.

Payment requests shall be submitted by the consortium leader, including the reporting of all expenditure incurred by the members of the consortium as final beneficiaries, accompanied by a statement issued by a Statutory Auditor, prepared in accordance with Technical Application Guide No. 19. The payment of support shall be made directly to the final beneficiaries, subject to the legality and compliance of the expenditure confirmed in that statement, without prejudice to any verification procedures that may be applicable under the management and control system.

IAPMEI may, by means of a Technical Guideline, define the specific conditions to be observed in the payment modalities provided for.

12. Indicative allocation of the fund to be granted

The allocation assigned to the present call, under the non-repayable incentive component, amounts to EUR 930 million, corresponding to the following indicative allocation:

- EUR 558 million for the Mobilising Agendas for Business Innovation;
- EUR 372 million for the Green Agendas for Business Innovation.

13. Compliance with applicable legal provisions

Public procurement

Where applicable, public procurement rules must be fully complied with in the procurement of goods or the provision of services from third-party entities.

Equal opportunities and gender equality

Compliance with the applicable national and European Union legal provisions concerning the promotion of gender equality between women and men and equal opportunities and non-discrimination must be ensured.

Personal data processing

All personal data shall be processed in accordance with Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, which repeals Directive 95/46/EC (General Data Protection Regulation – GDPR), and with the General Data Protection Regulation in force as of 25 May 2018.

Publicity of support

The requirements regarding information, communication and publicity related to the origin of the funding must be complied with, in accordance with Article 34(2) of Regulation (EU) 2021/241 of the European Parliament and of the Council of 12 February 2021 establishing the Recovery and Resilience Facility, as well as with the rules defined in Technical Guideline No. 05/2021 issued by the Recover Portugal Mission Structure.

14. Contact points for information and clarification

Access to information and clarification may be obtained through:

- IAPMEI – Recovery and Resilience Plan;
- e-mail: info@iapmei.pt;
- IAPMEI Blue Line at 808 201 201 or 213 836 237.

The present Notice is available at:

IAPMEI website – IAPMEI – [C5 | Business Capitalisation and Innovation](#);

RRP website – [PRR applications – Recover Portugal](#).

The President of IAPMEI

Luís Filipe Pratas Guerreiro

ANNEX A – “Do No Significant Harm” (DNSH) – Simplified DNSH exclusion list

- Activities related to fossil fuels, including downstream uses, except for the generation of electricity and/or heat, as well as related transport and distribution infrastructure, using natural gas, provided that they comply with the conditions set out in Annex III of the technical guidance on the application of the “do no significant harm” principle (European Commission Communication 2021/C 58/01).
- Activities covered by the EU Emissions Trading System (EU ETS) that achieve projected greenhouse gas emissions not lower than the applicable benchmark values. Where the supported activity achieves projected greenhouse gas emissions that are not significantly lower than the applicable benchmark values, an explanation must be provided as to why higher performance levels cannot be achieved. The benchmark values are those established for the free allocation of emission allowances to activities covered by the EU ETS, as provided for in Commission Implementing Regulation (EU) 2021/447.
- Activities related to waste landfills and incinerators, except for facilities exclusively intended for the treatment of non-recyclable hazardous waste, or for existing facilities where actions supported under this measure aim to increase energy efficiency, capture exhaust gases for storage or reuse, or recover materials from incineration ash, provided that such actions under this measure do not increase the waste processing capacity of the facilities nor extend their operational lifetime, and that this is demonstrated at facility level.
- Activities related to mechanical and biological treatment (MBT) plants, except for existing MBT facilities where actions under this measure aim to increase energy efficiency or convert operations into recycling activities for separately collected waste for composting and anaerobic digestion of biowaste, provided that such actions under this measure do not increase the waste processing capacity of the facilities nor extend their operational lifetime, and that this is demonstrated at facility level.
- Activities in which long-term waste disposal may cause harm to the environment.

ANNEX B – Reference framework for the preparation of the consortium agreement

In addition to the mandatory provisions laid down in the applicable regulations governing consortium agreements and the present incentive system, the consortium agreement must comply with the following reference framework:

a. Object of the consortium

The definition of the object must expressly set out the activities proposed under the investment project to be developed by the consortium and by each of its members, and adopt an appropriate governance model for its implementation and sound management. The identification of the project must also be clearly stated, including reference to its financing under the RRP – Recovery and Resilience Plan.

b. Type of consortium and liability

The consortium must adopt the form of an external consortium, and the joint liability of the consortium members must be expressly stipulated.

c. Cooperation and risk

The consortium agreement must clearly define the scope of cooperation among all consortium members and the sharing of risks.

d. Costs and resources

The project costs must be detailed, indicating the contribution of each member, as well as the technical and human resources required for its implementation.

e. Identification and obligations of the consortium leader

The consortium leader must be a company, which shall be identified as such and shall also assume the role of project leader, committing to:

- i. Submit the application and sign the acceptance term;
- ii. Represent the consortium and the consortium members in relations with IAPMEI;
- iii. Ensure the overall coordination of the project and liaise with the various beneficiaries;
- iv. Maintain a project file, in digital format, containing all documentation relating to the project;
- v. Provide, within the established time limits, any information or elements requested by the competent authorities for the purposes of analysis, monitoring, results evaluation, control and audit.

- vi. Notify IAPMEI of any changes or relevant occurrences concerning the consortium or the beneficiaries that may jeopardise the assumptions underlying the approval of the project;
- vii. Obtain prior authorisation from IAPMEI in order to make amendments to the consortium agreement;
- viii. Submit payment requests.

f. Obligations of the consortium members

Consortium members that assume, vis-à-vis the **RRP**, the status of **final beneficiaries** must, in addition to complying with the regulations applicable to the consortium agreement and to the present incentive system, fulfil the following obligations:

- i. Provide, within the established deadlines, any elements requested by the entities competent for analysis, monitoring, results evaluation, control and audit, or by the consortium leader for the purpose of supporting such actions;
- ii. Inform the consortium leader of any changes or relevant occurrences that may jeopardise the assumptions underlying the approval of the project, as well as any other information requested for validation by the competent entities responsible for analysis, monitoring, results evaluation, control and audit;
- iii. Allow access to the locations where the activities provided for in the project are carried out;
- iv. Diligently carry out the tasks incumbent upon each consortium member under the approved work plan within the scope of the project, allocating the necessary and appropriate human and material resources;
- v. *(Where wide dissemination of results is foreseen)* Allow the dissemination, on an open-access platform, of the scope and expected results of the R&D project, as well as publishable executive summaries relating to the final implementation reports, without prejudice to requirements relating to the protection of industrial property rights;
- vi. Establish a separate accounting system or an appropriate accounting code for all transactions related to the project;
- vii. *(Where applicable)* Comply, with regard to the right to publish and disseminate the project results, with the requirements underpinning the granting of the bonuses for “effective collaboration” and “wide dissemination”.

g. (Where applicable) Obligations of partners associated with the project who are also consortium members

NON OFFICIAL TRANSLATION – NON CONFIDENTIAL

With regard to consortium members assuming the status of associates (foreign partners and national associates), where such members are foreseen under the terms of approval of the project, the following obligations must be expressly laid down:

- i. Provide the consortium leader, within the deadlines set by the latter, with any elements requested by the entities competent for monitoring, results evaluation, control and audit;
- ii. Inform the consortium leader of any changes or relevant occurrences that may jeopardise the assumptions underlying the approval of the project;
- iii. Allow access, where applicable, to the locations where the activities provided for in the project are carried out;
- iv. Diligently carry out the tasks incumbent upon them under the approved work plan, allocating the necessary and appropriate human and material resources, where applicable.

h. Confidentiality and intellectual and/or industrial property

Matters relating to confidentiality and intellectual and/or industrial property must be duly specified in the consortium agreement. No ownership rights resulting from R&D activities carried out by beneficiaries of the incentives (co-promoters) may be held by foreign partners or other project associates (who are not co-promoters).

Where the project benefits from the bonuses for “effective collaboration” and “wide dissemination”, the consortium agreement must safeguard the obligations inherent thereto in terms of confidentiality and protection of intellectual property. In particular, the agreement must expressly provide that “the non-business R&I system entity(ies) have the right to publish the project results arising from the R&D carried out by them”.

i. Dissemination of results

The consortium agreement must expressly provide for the obligation to disseminate the project results, specifically stipulating that “the results of the project shall be subject to wide dissemination through technical and scientific conferences or publication in scientific or technical journals, or archived in open-access databases, i.e. databases to which access to raw research data is freely available, or through free or publicly available software”.

Where the granting of incentives to **non-business entities of the R&I system** does **not** involve indirect State aid to undertakings and such undertakings intend to benefit from an aid intensity reflecting that situation, the consortium agreement must safeguard the obligations associated with the **dissemination of results and intellectual property**, by establishing at least one of the following conditions:

- a. *“Results that do not give rise to industrial property rights (IPRs) may be widely disseminated, and any IPRs resulting from the activities of the research organisations or infrastructures shall be fully allocated to those entities, which shall hold all related ownership rights”; and/or*
- b. *“Any IPRs resulting from the project, as well as the related access rights, shall be allocated to the different collaboration partners in a manner that adequately reflects their work packages, contributions and respective interests”; and/or*
- c. *“The research organisations or infrastructures shall receive compensation equivalent to the market price for the IPRs resulting from their activities and transferred to the participating undertakings; such compensation may be reduced by the absolute amount of the value of the contributions, both financial and non-financial, made by the participating undertakings towards the costs of the activities of the research organisations or infrastructures that give rise to the IPRs in question”.*

For the purposes of point (c) above, and in accordance with paragraph 29 of point 2.2.2 of European Commission Communication 2014/C 198/01, published in the Official Journal of the European Union C 198 of 27 June 2014, the compensation received shall be considered equivalent to market prices if it enables the non-business entities of the R&I system concerned to enjoy the full economic benefits of those rights, provided that one of the following conditions is met:

- a. The amount of compensation was established through an open, transparent and non-discriminatory competitive sale procedure; or
- b. An independent expert valuation confirms that the amount of compensation is at least equal to the market price; or
- c. The research organisation or infrastructure, acting as the seller, is able to demonstrate that it effectively negotiated the compensation under arm’s-length conditions in order to obtain the maximum economic benefit at the time the agreement was concluded, while simultaneously taking into account its statutory objectives; or
- d. In cases where the collaboration agreement grants the collaborating undertaking a right of first refusal with regard to the industrial property rights (IPRs) generated by the collaborating research organisations or infrastructures, where such entities exercise a reciprocal right to request economically more advantageous offers from third parties, so that the collaborating undertaking is required to adjust its offer accordingly.

At the project closure stage, if none of the conditions mentioned above are met, the full value of the contribution made by the non-business entities of the R&I system to the project shall be regarded as an advantage for the collaborating undertakings, to which State aid rules shall apply.

j. Final ownership of acquired or developed assets

The consortium agreement must establish the rights and obligations associated with the final ownership of the assets acquired or developed in the course of project implementation. Such ownership must not belong to foreign partners or other associates of the project (who are not co-promoters). Attention is also drawn to the provisions of point (l) of Article 18 of the Regulation of the Incentive System “Agendas for Business Innovation”, annexed to Ministerial Order No. 43-A/2022 of 19 January.

k. Duration of the consortium / term

The term of the consortium agreement must cover not only the project implementation period, but must also safeguard the duties, responsibilities and obligations of the consortium, in accordance with the provisions of point (m) of Article 18 of Ministerial Order No. 43-A/2022 of 19 January.

ANNEX C – Maximum aid intensities by type of State aid

Aid category	Eligible costs (under certain conditions)	Maximum aid intensities (Gross Grant Equivalent)
Regional investment aid (GBER) Article 14 (regional investment aid)	Article 14: a) Investment costs in tangible and intangible assets; b) Estimated wage costs arising from job creation resulting from an initial investment, calculated over a two-year period; or c) A combination of points (a) and (b), not exceeding the higher of those amounts.	Regional Aid Map 2021–2027 in force until 31/12/2027 (*), support rates (**) for non-SMEs: - North, Centre and Alentejo: 30% - Autonomous Region of the Azores: 50% Autonomous Region of Madeira: 40% - Non-predefined ‘c’ regions (to be designated by the Member State): 15% or 10% (*) The maximum aid intensities and/or bonuses shall be those set out in the new Regional Aid Map for the period 2022–2027, as approved by the European Commission pursuant to the Guidelines on regional State aid, adopted by Commission Communication C(2021) 2594 final of 19 April 2021. (**) These may be increased (provided that the aid intensity for non-SMEs in the region concerned does not exceed 70%) by 10 percentage points in territories identified to benefit from support under the Just Transition Fund within the framework of a territorial just transition plan of a Member State approved by the Commission, and by 5 percentage points for NUTS 3 regions that recorded a population decline of more than 10% during the period 2009–2018. Bonuses: Medium-sized enterprises: 10% Small enterprises: 20% (only for projects with eligible expenditure ≤ EUR 50 million) For Large Projects – investments with eligible expenditure > EUR 50 million – these limits are subject to an adjustment in accordance with point 19(3) of the Guidelines on regional State aid for the period 2021–2027.

Aid category	Eligible costs (under certain conditions)	Maximum aid intensities (Gross Grant Equivalent)
Investment aid for SMEs (GBER) • Article 17	a) Investment costs in tangible and intangible assets; b) Estimate wage costs of employment directly created by the investment project, calculate for a two-year period.	Maximum support rate: • Small enterprises: 20 % • Medium-sized enterprises: 10 %
Consultancy aid for SMEs (GBER) • Article 18	Costs of consultancy services provided by external consultants.	Maximum aid intensity: • SMEs: 50 %
Aid for SMEs' participation in fairs (GBER) • Article 19	Costs incurred for the rental, construction and operation of the stand when participating in a trade fair or exhibition.	Maximum aid intensity: • SMEs: 50 %
Aid for cooperation costs incurred by SMEs in European Territorial Cooperation projects (GBER) • Article 20	a) personnel costs; b) installation and administrative expenditure; c) travel and accommodation expenses; d) costs of expert services and external services; e) equipment expenditure; and f) infrastructure and construction costs.	The aid intensity shall not exceed the maximum co-financing rate provided for in Regulation (EU) No 1303/2013 or in Regulation (EU) 2021/1060 and/or Regulation (EU) 2021/1059 of the European Parliament and of the Council, as applicable.
Aid for research and development projects (GBER) • Article 25	a) Personnel costs: researchers, technicians and other supporting staff, to the extent that they are employed on the project; b) Costs of instruments and equipment, to the extent and for the period during which they are used for the project; c) Costs of buildings and land, to the extent and for the period during which they are used for the project; d) Costs of contract research, knowledge and patents purchased or licensed from external sources under arm's length conditions, as well as consultancy and equivalent services used exclusively for the project;	Base aid intensity: • Basic research: 100 % • Experimental development: 25 % • Industrial research & feasibility: 50 % Bonuses: • Only for industrial research and experimental development: Medium-sized enterprises 10% and small enterprises 20% Effective collaboration or wide dissemination: 15% (up to a maximum aid intensity of 80%) • Only for feasibility studies: Medium-sized enterprises 10% and small enterprises 20%

Aid category	Eligible costs (under certain conditions)	Maximum aid intensities (Gross Grant Equivalent)
	e) Overheads and other additional operating expenses, including in particular costs of materials, supplies and similar products,	
Aid for innovation clusters (GBER) • Article 27	• Investment aid for the construction or upgrading of innovation clusters: investment costs in tangible and intangible assets; • Operating aid for innovation clusters shall cover personnel and administrative costs (including overheads) related to the following activities: a) Cluster animation to facilitate collaboration, information sharing, and the provision or channelling of specialised and customised business support services; b) Marketing operations of the cluster, with a view to increasing the participation of new undertakings or organisations, as well as enhancing their visibility; c) Management of cluster facilities; organisation of training programmes, seminars and conferences, with a view to supporting knowledge sharing and networking, as well as transnational cooperation	Maximum aid intensity: 50 % Bonuses: • +15 % for innovation cluster in the Regions North, Centre, Alentejo, Madeira, Azores; or • +5 % 5% Non-predefined 'c' regions (to be designated by the Member State) (*) (*) The maximum aid intensities and/or bonuses shall be those set out in the new Regional Aid Map for the period 2022–2027, as approved by the European Commission pursuant to the Guidelines on regional State aid, adopted by Commission Communication C(2021) 2594 final of 19 April 2021.
Innovation aid for SMEs (GBER) • Article 28	a) Costs of obtaining, validating and defending patents and other intangible assets; b) Costs relating to the secondment of highly qualified personnel from a research and knowledge-dissemination organisation, or from a large enterprise, who are assigned to research, development and innovation tasks within the framework of a newly created	Maximum aid intensity: SMEs: 50 % In the specific case of aid for innovation advisory services and innovation support services, the aid intensity may be increased up to 100%, provided that the total amount of aid for such services does not exceed EUR 200 000 per undertaking over a three-year period.

Aid category	Eligible costs (under certain conditions)	Maximum aid intensities (Gross Grant Equivalent)
	function in the beneficiary undertaking and who do not replace other staff members; c) Costs of innovation advisory services and innovation support services.	
Process and organisational innovation aid (GBER) • Article 29	a) Personnel costs; b) Costs of instruments, equipment, buildings and land, to the extent and for the period during which they are used in the project and throughout its implementation; c) Costs of contract research, knowledge and patents purchased or licensed from external sources under normal competitive conditions; d) Additional overheads and other operating costs, including in particular costs of materials, supplies and similar products, which are incurred directly as a result of the project.	Maximum aid intensity: 50% for SMEs 15% for non-SMEs cooperating with SMEs (SMEs must bear at least 30% of the total eligible costs)
Training aid (GBER) • Article 31	a) Personnel costs relating to trainers, for the hours during which the trainers participate in the training; b) Operating costs relating to trainers and trainees directly related to the training project, such as travel expenses, materials and supplies directly related to the project, and depreciation of tools and equipment, to the extent that they are used exclusively for the training project concerned. Accommodation costs are excluded, except for the minimum accommodation costs necessary	Maximum aid intensity: 50 % Bonuses: • +10 % for disadvantaged or disabled workers; • +10 % for medium enterprises or 20 % for small enterprises (maximum aid intensity of 70 %). Where aid is granted in the maritime transport sector, the aid intensity may reach 100%, provided that the trainees are not active crew members but are supernumeraries on board, and that the training is carried out on board vessels registered in Union registers.

Aid category	Eligible costs (under certain conditions)	Maximum aid intensities (Gross Grant Equivalent)
	for trainees who are workers with disabilities; c) Costs of consultancy services associated with the training project; d) Personnel costs relating to trainees and general indirect costs (administrative costs, rents, overheads) in relation to the total number of hours during which the trainees participate in the training.	
De minimis aid (Regulation (EU) No 1407/2013)	Other costs not covered by the GBER categories above.	Maximum ceiling of EUR 200 000 over a three-year period per single undertaking. In the case of a single undertaking carrying out road freight transport for hire or reward, the maximum aid amount is EUR 100 000 over a three-year period.

ANNEX D – Main notification thresholds applicable by category (Article 4 GBER)

Indicative information

1 – With regard to the main aid categories applicable to the Agendas, the GBER – Regulation (EU) No 651/2014 does not apply to aid exceeding the following thresholds:

- In the case of regional investment aid: the “adjusted aid amount”, calculated in accordance with the mechanism defined in Article 2(20), for an investment with eligible costs of EUR 100 million;
- In the case of investment aid for SMEs: EUR 7.5 million per undertaking per investment project;
- In the case of consultancy aid for SMEs: EUR 2 million per undertaking per project;
- In the case of aid for SMEs’ participation in fairs: EUR 2 million per undertaking per year;
- In the case of aid for research and development:
 - where the project consists predominantly of industrial research: EUR 20 million per undertaking per project; this applies where more than half of the eligible project costs are incurred for activities falling within the category of industrial research or the combined categories of industrial research and fundamental research;
 - where the project consists predominantly of experimental development: EUR 15 million per undertaking per project; this applies where more than half of the eligible project costs are incurred for activities falling within the category of experimental development;
 - where the project is a EUREKA project or is implemented by a joint undertaking established pursuant to Article 185 or Article 187 of the Treaty, the amounts referred to in points (i) to (iii) above shall be doubled;
 - where aid for research and development projects is granted in the form of repayable advances which, in the absence of an accepted methodology for calculating their gross grant equivalent, are expressed as a percentage of eligible costs, and where the measure provides that, in the event of a successful outcome of the project, defined on the basis of a reasonable and prudent hypothesis, the advances will be repaid at an interest rate at least equal to the discount rate applicable at the time the aid is granted, the amounts referred to in points (i) to (iv) above shall be increased by 50%;
- Aid for feasibility studies for the preparation of research activities: EUR 7.5 million per study;
- In the case of investment aid for research infrastructures: EUR 20 million per infrastructure;

- In the case of aid to innovation clusters: EUR 7.5 million per cluster;
- Innovation aid for SMEs: EUR 5 million per undertaking per project;
- In the case of aid for process and organisational innovation: EUR 7.5 million per undertaking per project;
- In the case of training aid: EUR 2 million per training project.

2 - The thresholds set or referred to in paragraph 1 shall not be circumvented by means of an artificial splitting of aid schemes or aid projects.

ANNEX E – Project Descriptive Memorandum

I. Final consortium and its members, highlighting:

- Their synergies and contributions;
- The consortium governance model;
- The type of activity to be carried out by each member within the scope of the Agenda (economic and/or non-economic), applicable only to non-business entities;

II. Nominal identification and description of the products, services and/or solutions resulting from the Agenda.

III. Activity Plan, identifying the participation of the entities forming part of the consortium, their sequencing and contribution to the objectives of the Agenda with regard to the new products, services and solutions.

IV. Investments to be carried out by each of the entities forming part of the consortium that qualify as beneficiaries of support (summary budget associated with the planned activities), the corresponding implementation schedule and the location of the investments.

V. Demonstration of the relevance and coherence of the Proposal in relation to the proposed objectives:

- The innovative nature and its strategic relevance for changing the productive specialisation profile or for transforming relevant value chains of the new products and services to be placed on the market;
- The consistency of the R&D activities to be developed for the creation of the knowledge necessary to achieve the proposed objectives in terms of the effective placement on the market of new products and services;
- The consistency of the proposed objectives in terms of increases in Sales and Gross Value Added relative to the proposed investment.

VI. Proposed targets, which must contribute to enabling Portugal to achieve the strategic targets defined up to 2030 in terms of exports of goods and services, investment in R&D and the reduction of CO₂ emissions.

The proposed targets must be reflected in the identification of the indicators set out below, which take 2020 as the baseline year and 2027 as the target year:

Objective	Indicator	Calculation method
Impact of the project on changing the specialisation profile of the Portuguese economy	Level of value added	Percentage change (%) between the baseline and the target value of the GVA / GVP ratio of the total of the companies forming part of the Consortium
Impact of the project on the national or regional economy (investment multiplier effect) and on the competitiveness and productivity of the sector or cluster	Share of purchases, supplies and external services sourced from the national market	Percentage change (%) between the baseline and the target value of the ratio of the sum of purchases, supplies and external services originating from the national market / total purchases, supplies and external services of the companies forming part of the Consortium
Impact of the project on the production of tradable goods and services in the sector or country, as well as on reducing dependence on the domestic market relative to external markets	Export intensity of the companies forming part of the Consortium	Percentage change (%) between the baseline and the target value of international turnover / total turnover of the companies forming part of the Consortium
	Turnover associated with the new products and services to be introduced to the market as a result of the project	Sales value (EUR) resulting from the new products and services introduced by the project
Impact of the project on the main value chain or secondary value chains into which the project is integrated	Economic valorisation of innovation	Number of new products, services and/or patents introduced by the project
Contribution of the project to the upskilling of human resources	Employment qualification level	Percentage change (%) between the baseline and the target value of the ratio of highly qualified employment (HQE) / total employment of the entities forming part of the Consortium
		Number of training actions carried out

Objective	Indicator	Calculation method
Creation of new knowledge and its dissemination	Technical-scientific publications co-authored by companies and NBERIs	Number of technical-scientific publications co-authored by companies and non-business R&I system entities (NBERIs) resulting from the project Number of dissemination actions for the knowledge created
Contribution of the project to carbon neutrality	Reduction of greenhouse gas emissions associated with production processes	Percentage change (%) between the baseline and the target value of greenhouse gas emissions associated with the production processes of the companies forming part of the Consortium
	Incorporation of renewable energy in production processes	Percentage change (%) between the baseline and the target value of the percentage of renewable energy incorporated in the production processes of the companies forming part of the Consortium
	Incorporation of recycled/reused materials in production processes	Percentage change (%) between the baseline and the target value of the percentage of recycled/reused materials incorporated in the production processes of the companies forming part of the Consortium
Job creation, direct and indirect, by qualification level	Jobs created as a result of the project within the Consortium entities	Number of new jobs created within the Consortium entities as a result of the project Number of jobs corresponding to highly qualified human resources, including PhD holders

The indicated targets (PPS) shall be subject to monitoring at the end of 2025.

ANNEX F – Reference Framework for the Assessment of the Evaluation Criteria

In the scoring of the evaluation criteria, the following aspects shall be taken into account:

A. Degree of innovation or differentiation: Assesses the degree of innovation³³ involved in the introduction of new products (goods or services) or new or significantly improved processes, in work organisation or in the company's external relations, which address duly identified real problems, and whether the products, services and processes to be developed have the potential to contribute positively to the growth of the companies participating in the consortium and to the strengthening of their internal R&D and innovation capabilities.

Aspects to be considered:

- Integration of previously developed knowledge and R&D activities with significant technical or technological developments, duly substantiated in relation to the state of the art;
- New products, services, processes or systems resulting from the project, or the introduction of significant improvements in existing products, services, processes or systems that respond to duly identified real market needs;
- Effective contribution of the new products, services or solutions to the growth of the companies participating in the consortium;
- Strengthening of the internal R&D and innovation capabilities of the business entities, in particular:
- Increase in R&D expenditure by the participating business entities and incorporation of human resources in R&D and innovation;

B. Impact of the project on business competitiveness and on changing the country's productive specialisation profile: Assesses the potential effects on the performance of the companies participating in the consortium and the subsequent effects on the competitiveness of the economy, namely by promoting a shift in the current productive profile towards more technology- and knowledge-intensive activities and a more advantageous integration into the value chain. Contributions to the strategic objectives defined above and articulation with the other domains of the RRP (notably gender equality and equal opportunities for all), the effects on the diffusion and dissemination of knowledge, the capacity for specialised and advanced training of human resources, and the capacity to induce a structural change in the sector or cluster (multiplier effect) shall be valued.

Aspects to be considered:

³ As defined in the Oslo Manual (Eurostat; OECD, 2005).

- Activities in sectors or products of higher complexity, namely in products with export potential to a large number of countries and for which the number of global producers is low⁴⁴;
- Creation/development of products, processes and services in a sector or sectors that are under-represented in the Portuguese economy, or aimed at achieving a more highly valued position within the value chain of an existing sector, or at the integration of segments of the value chain that are not yet present;
- Impact on sectoral growth in terms of its weight in overall growth, taking into account the project's impact indicators for changing the specialisation profile of the Portuguese economy and the project's impact indicators on the production of tradable goods and services;
- Impact on the potential spillover effects on other actors within the value chains targeted by the initiative;
- Contribution of the project to the upskilling of human resources through the recruitment of highly and specialised qualified staff, including PhD holders assigned to the project, and through human resources capacity-building actions, including participation in or collaboration with training programmes in areas relevant to the project, including advanced training;
- Existence of gender equality and equal opportunities for all, and/or identification of activities aimed at their promotion.

C. Potential impact on the region where the project is implemented: Aims to assess whether the actions and investments included in the project have an impact on the regions, in particular in less developed regions and low-density territories, fostering territorial cohesion and benefiting the economy of those regions.

Aspects to be considered:

- Participation of consortium entities located in low-density territories;
- Job creation directly associated with project implementation in less developed regions and low-density territories;
- Direct economic impact in low-density regions;
- Enhancement of other activities, projects or initiatives in the participating regions.

D. Investment leverage capacity: Assesses the capacity of the investment to leverage other sources of co-financing, public and private, national and European, including synergies with other RRP programmes, as well as other national and EU funding programmes.

Aspects to be considered:

- Lack of potential eligibility under other support programmes or RRP measures.

⁴⁴ As defined at <https://oec.world>

- Leverage of economic results measured by the Gross Value Added generated by the consortium entities in relation to the proposed investment;
- Definition of strategic planning for leveraging co-financing sources to finance investments aimed at the dissemination and transfer of technology to other undertakings;
- Generation of synergies between selected Expressions of Interest, reflected in their aggregation into a single final proposal that demonstrates greater investment leverage in relation to the initial objectives.

E. Potential for economic valorisation of innovation and scalability: Aims to assess the state of development of the R&D component of the proposal and the potential impact of technology transfer on the national economic fabric. In addition, it analyses the level of technological maturity and the possibility of rapid dissemination among the various consortium actors and/or impact across the entire value chain.

Aspects to be considered:

- Plan for the economic valorisation of results, promoted in particular through the number of technology dissemination activities and technical-scientific promotion activities (national and international);
- Demonstrated potential impact on exports of the products, services or solutions to be developed and/or potential for import substitution from other regions of the world;
- Demonstration of the market potential for the products, services or solutions to be developed;
- Capacity for technology transfer to the national economic fabric, including, inter alia, the proposal of real-world demonstration of the use or application of the product(s), process(es) or system(s) targeted by the project and the manner of incorporation of the technology taker — the project includes the actual use of the product, service, system or process by the technology taker;
- Economic valorisation of innovation, taking into account the number of new products, the number of patents introduced by the project, the number of registered trademarks (or to be registered), the number of utility models, or the number of design models.

F. Contribution of the project to carbon neutrality and energy resilience: In particular through its contribution to the European Flagship Initiatives under the Annual Sustainable Growth Strategy⁵, notably with regard to strengthening energy capacity (clean technologies and accelerating the development and use of renewable energy, as well as their integration through modernised and more interoperable

⁵ Communication COM (2020) 575, 17 November

networks), and in terms of building renovation for the promotion of energy efficiency in buildings and in terms of recharging and refuelling infrastructure, with a view to promoting sustainable transport.

Aspects to be considered:

- Contribution to the European Flagship Initiatives under the Annual Sustainable Growth Strategy;
- Contribution to strengthening energy capacity — clean technologies and accelerating the development and use of renewable energy, as well as their integration through modernised networks with greater interoperability;
- Promotion of energy efficiency in buildings and of recharging and refuelling infrastructure, in support of sustainable transport.

G. Quality of the consortium in terms of the promoters' competencies in relation to the project objectives and the consortium governance model: Assesses whether the project enables greater complementarity of competencies, provides for risk-sharing, brings together elements with management expertise and key technological competences for the project, including broad participation across the value chain, as well as the clarity of the consortium governance model, the track record of execution and the degree of involvement in the proposed activities.

Aspects to be considered:

- Qualification and suitability of the project teams/consortium, namely through the identification of team allocation;
- Consortium infrastructures for the implementation of all project activities;
- A governance model appropriate to the implementation of the proposed activities and to sound project management, making the most of the consortium members;
- Risk management, including risk control and mitigation, integrating a specific model with risk identification, impact measurement and control indicators;
- Integration of different types of partners, including a diversity of business and non-business actors;
- Full consortium, including the existence of end-users of the technology.

H. Economic and financial viability of the projects and of the applicants: Assesses the financing capacity of the entities forming part of the consortium, in particular their ability to meet the private contribution involved in the project, as well as the future profitability of the investments.

This criterion is assessed across the following dimensions:

- Adequacy and reasonableness of the resources involved in the investment plan, by type of action;

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- Financial capacity of the applicants to ensure the private contribution component, with funding sources identified for the full set of activities;
- Demonstration of the future profitability of the proposed investments, for example through NPV, IRR or Payback;
- Direct turnover from the new products and services covered by the Agenda within the consortium entities, in relation to the proposed investment amount.

Each criterion shall be scored on a scale from 1 to 5, taking into account the evaluation parameters described above, in accordance with the following scoring scale:

1 – Weak: The proposal does not address the criterion or cannot be assessed due to incomplete information.

2 – Insufficient: The proposal addresses the criterion, but significant weaknesses are identified.

3 – Good: The proposal addresses the criterion well, but some weaknesses are identified.

4 – Very Good: The proposal addresses the criterion very well, with only a small number of weaknesses.

5 – Excellent: The proposal successfully addresses all relevant aspects of the criterion; any weaknesses are minor.