



**MARCO POLO**  
NEW WAYS TO A GREEN HORIZON

# Practical aspects and requirements of the Marco Polo call

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Marco Polo Info Day  
Brussels, 13 September 2011



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## Outline

- General Advice
- 10 Golden Rules for Success
- Proposal Structure
- Available Support



## General Advice

1. Decide your action type (no mixing allowed)
2. Follow the structure of the Call and the 10 Golden Rules for Success
3. Pay attention to specific documents and requirements
4. Use the available support



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## 10 Golden Rules for Success

1. Understand the criteria and the conditions
2. Involving sound partner(s) and subcontractor(s)
3. Aim for high modal shift/traffic avoidance & environmental benefits
4. Demonstrate **credibility & viability**
5. Show the real innovation (not for MOD actions)
6. Pay attention to possible **unacceptable distortions of competition!**
7. Justify your business plan, including the financial aspects
8. Use the available support
9. Write a clear and concise proposal
10. Take care of the formal requirements



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## 10 Golden Rules for Success

### ■ **1. Understand the criteria and conditions!**

- ▶ Carefully read the call text
- ▶ Understand all eligibility, exclusion, selection & award criteria & funding conditions
- ▶ If resubmitting, take into account comments received previously – to improve your proposal



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## 10 Golden Rules for Success

### ■ **2. Involving sound partner(s) and subcontractor(s)!**

- ▶ Submission of documents to prove:
- ▶ Relevance and competency - a shipper, manufacturer etc.
- ▶ Proof of commitment – “*joint letter of intent*” for consortia
- ▶ Technical & financial capability - *track records, CV's, last annual financial statements*
- ▶ **A partner is not a subcontractor and vice versa** (no cross-invoicing between partners)



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## 10 Golden Rules for Success

### ■ 3. Aim for high modal shift / traffic avoidance & environmental and social benefits!

- ▶ The more, the better
- ▶ But must be realistic/credible!
- ▶ **Credibility of the envisaged route** (no circumvention of eligibility criteria by artificially designing the route)
- ▶ **Compulsory:** Marco Polo calculator – *fill in and attach all the pages of the calculator* – as we need to verify the results



## 10 Golden Rules for Success

### ■ 4. Key: Demonstrate credibility! (1)

- ▶ *Very important criterion!*
- ▶ How to increase credibility? Describe:
- ▶ The market: market research - potential modal shift/traffic avoidance, problems in the market (low water level, border crossings, permits needed, etc.)
- ▶ The type and quantity of freight
- ▶ Return cargo
- ▶ Recent letters of intent/commitment from potential customers



## 10 Golden Rules for Success

### ■ 4. Key: Demonstrate credibility! (2)

- ▶ Realistic loading factor – *slowly developing*
- ▶ Prove start up of service: availability of the transport medium, equipment/infrastructure, slots, authorisations etc.
- ▶ Letters of intent/commitment from subcontractors, especially transport operator



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## 10 Golden Rules for Success

### ■ 4. Key: Demonstrate credibility! (3)

- ▶ Service details:
  - technical (type, age of transport medium...),
  - timetables, frequency, transit time vs. road - **competitive?**
  - old and new route with detailed maps
  - pre- & post carriage by road
- ▶ If upgrade – what is the significant extension? (higher frequency, capacity...)
  - exclude modal shift/costs of the existing service – **cannot be financed!**



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## 10 Golden Rules for Success

### ■ 4. Key: Demonstrate credibility! (4)

- ▶ Role of partners
- ▶ Ideally, sharing of the subvention – proportionate to the effort of the partner
- ▶ Mention key staff involved
- ▶ All partners (including subcontractors) committed?



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## 10 Golden Rules for Success

### ■ 4. Key: Demonstrate viability!

- ▶ Viability beyond subsidy period – business plan covering at least one year after the Marco Polo period – **ideally, profit-making**
- ▶ **Very important to increase your proposal's credibility**
- ▶ Not compulsory for Common learning actions
- ▶ Credible business plan
  - detailed for the Marco Polo funding period + 1-2 years after
  - separation between eligible and non-eligible costs, & revenue




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## 10 Golden Rules for Success

- **5. Show the real innovation!**
  - ▶ All action types except MOD
  - ▶ Elements which did not exist before in a given market
  - ▶ New operational technology or already existing but applied in a new market
  - ▶ Concrete dissemination plan (what, when, where, how, **not only announcements**)



## 10 Golden Rules for Success


- **6. Pay attention to possible distortions of competition!**
  - ▶ Very important for MOD – not necessarily innovative
  - ▶ **Very important for SSS in Call 2011- special expert group appointed to analyse this point** 
  - ▶ **Truthfully and exhaustively analyse!**
  - ▶ *Shift from road!* (not from other competing SSS, rail, IWT services)





## 10 Golden Rules for Success

### ■ 7. Justify your business plan including the financial aspects (1)

- ▶ Justify all **eligible** costs
- ▶ Exclude non eligible costs (on not fully participating countries, costs of road transport, passengers etc.)
- ▶ **Costs & revenue linked to the passenger service – not related to the action**  
- eliminated from the budget but needs to be disclosed! **Eliminate:** 
  - Costs and revenues 100% linked to the passenger service
  - Shared costs: calculate the % of passenger revenues in comparison to total revenues (freight + passenger)



## 10 Golden Rules for Success

### ■ 7. Justify your business plan including the financial aspects (2)

- ▶ How to determine the eligible costs in a 3rd country **not fully participating to MP**
- ▶ Costs incurred on the territory of the 3<sup>rd</sup> country are **non-eligible** (port costs, handling costs etc.)
- ▶ For sea routes, costs are eligible up until the first port in the 3<sup>rd</sup> country
- ▶ **All costs and revenues related to the action** must be indicated - no accumulated profit over the MP contract duration







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## 10 Golden Rules for Success

- **8. Use the available support!**
  - ▶ Support tools and Helpdesk by EACI
  - ▶ Use the available checklists (Marco Polo website)
  - ▶ Cross-check of proposal by an external person before submission



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## 10 Golden Rules for Success

- **9. Write a clear and concise proposal!**
  - ▶ Main text: clear, comprehensive and logical
  - ▶ Avoid repetitions
  - ▶ Further details and confidential elements in annexes
  - ▶ Old and new routes described with self-explanatory maps
  - ▶ Use MP calculator
  - ▶ Take care of conditions and criteria, including the **analysis of competition (well analysed and demonstrated!)**



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## 10 Golden Rules for Success

### ■ 10. Take care of the formal requirements! (1)

- ▶ Complete proposal with main text, annexes and MP Calculator
- ▶ Forms filled out (project overview, declaration of applicant(s), joint letter of intent (for consortia), acknowledgement of receipt)
- ▶ 1 original, 5 paper copies and CD-ROM (in one package to avoid partial losses)
- ▶ Signature and stamp by lead partner on original



## 10 Golden Rules for Success

### ■ 10. Take care of the formal requirements! (2)

- ▶ Respect the **deadline – cannot be extended** - proposals/documents sent in **after the deadline will not be taken into account!**
- ▶ By hand delivery – at 16.00 pm on the closing date – to the central mail service of the Commission (**not the EACI offices**)
- ▶ By registered letter – post stamped on the **closing date** at the latest



## Proposal Structure

See **Annex 2 to Call text:**

- Part I - Forms (3 or 4 forms)
- Part II: Main Text (specific for each action type)
- Part III: Annexes (business plan, Marco Polo calculator, market research, letters of intent, proof of VAT status, CV's, financial statements etc.)



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## Available Support

- **MARCO POLO Website**  
<http://ec.europa.eu/marcopolo>
  - ▶ Call text, model contract, templates
  - ▶ Checklists, FAQ, guidance documents
  - ▶ MARCO POLO calculator
  - ▶ Presentations held at Marco Polo conferences
- **MARCO POLO Helpdesk**
  - ▶ Email: [eaci-marco-polo-helpdesk@ec.europa.eu](mailto:eaci-marco-polo-helpdesk@ec.europa.eu)
  - ▶ Phone: +32 (02) 29-50924
  - ▶ Fax: +32 (02) 29-79506

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**Good luck with your proposal!**

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