



**TURKEYⁱⁿ
HORIZON 2020**
COOPERATION INNOVATION COMPETITIVENESS

TURKEY IN HORIZON 2020
ALTUN/HORIZ/TR2012/0740.14-2/SER/005



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H2020 Theme Oriented Training on Legal and Financial Issues

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Introduction

The purpose of this training session is to help administrators from universities and companies to better understand the new H2020 Programme in terms of:



- The structure
- Rules of participation
- Financial issues in the proposal and project phases
- Managing your organisation on the 'Participant Portal'

With this you should be able to support your researchers and developers in the proposal phase and during a running project.





So, what you need to know is:

- Background Information:
 - H2020 structure and programmes
 - Project types and grant conditions
- Proposal Procedures:
 - Which cost estimations to provide
 - How to register your organization
- Running Projects:
 - How to keep track of all cost expenditures
 - How to nominate admin and financial responsible persons for the EC



You do not, however, ...

... have to understand the technical/scientific content of proposal/project in detail.

But you should have a general understanding of what your researchers/developers will be doing in the project in order:

- To provide realistic cost estimates, and
- To monitor the costs incurred



What means 'EU funding' ?

Europe has implemented a large variety of funding programmes over the past 30 years for its member states in the fields of education, research, development, innovation, etc. addressing

- Students (e.g. Erasmus)
- Higher education (e.g. Tempus)
- Research Institutions (e.g. H2020)
- The Private sector (e.g. H2020 and CIP in the past)

By far the largest is the

**Horizon 2020 - Research and Innovation
framework programme.**



Characteristics of H2020

- Partnership: Transnational collaboration (min. 3 partners/3 countries, exception: ERC grants, MSC)
- Open to all: Industry, SMEs, Universities,...
- Consortia selected via Calls for Proposals (published on an annual basis) and evaluation procedures through independent experts
- Strategic objectives - programme oriented
- Innovative, based on science & technology excellence
- Competitive - competition of the best teams in EU
- Project results are the property of the participants



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PART 1: From FP7 to H2020

FP7 was the Seventh Framework Programme for Research and Technological Development. It was running from 2007 to 2013.

It had a funding budget of around 55 bn Euro.

The new Framework Programme started in 2014 and will run again for 7 years:

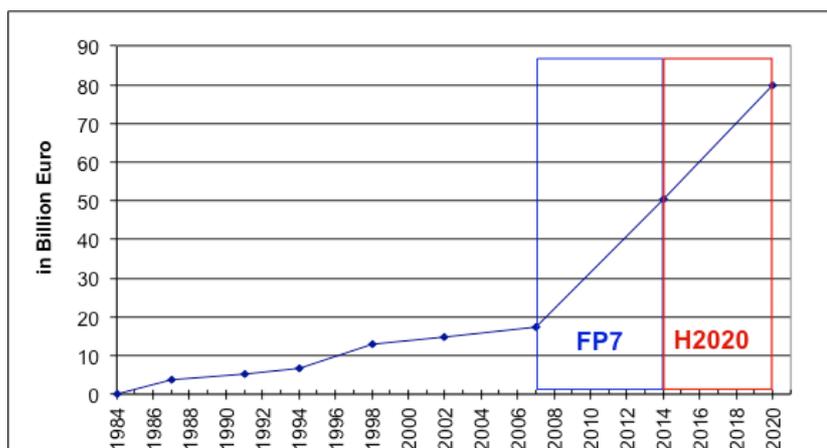
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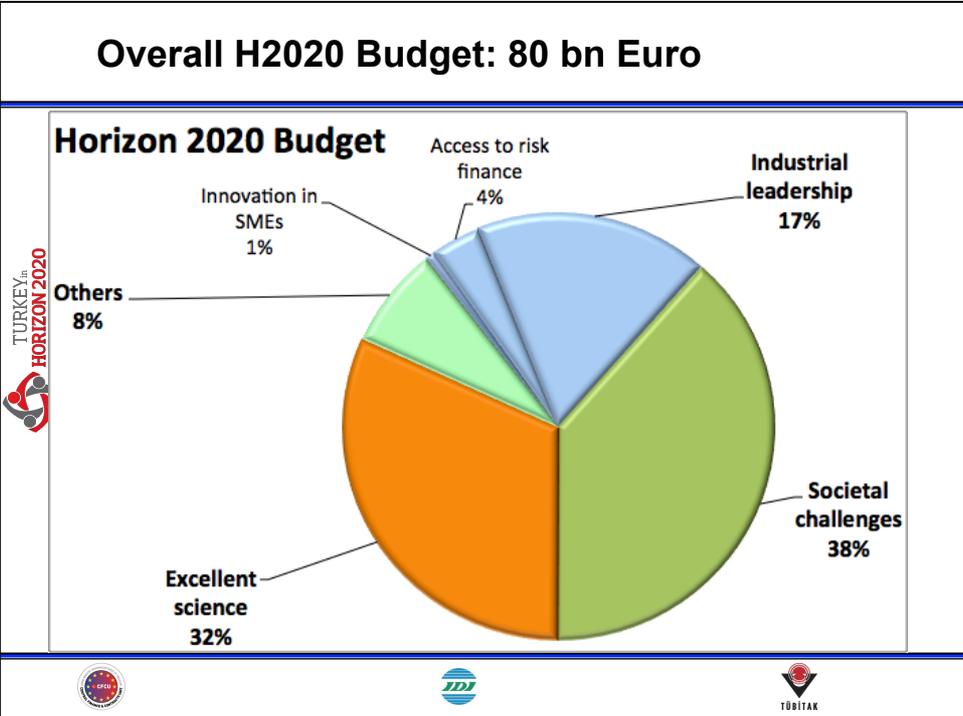
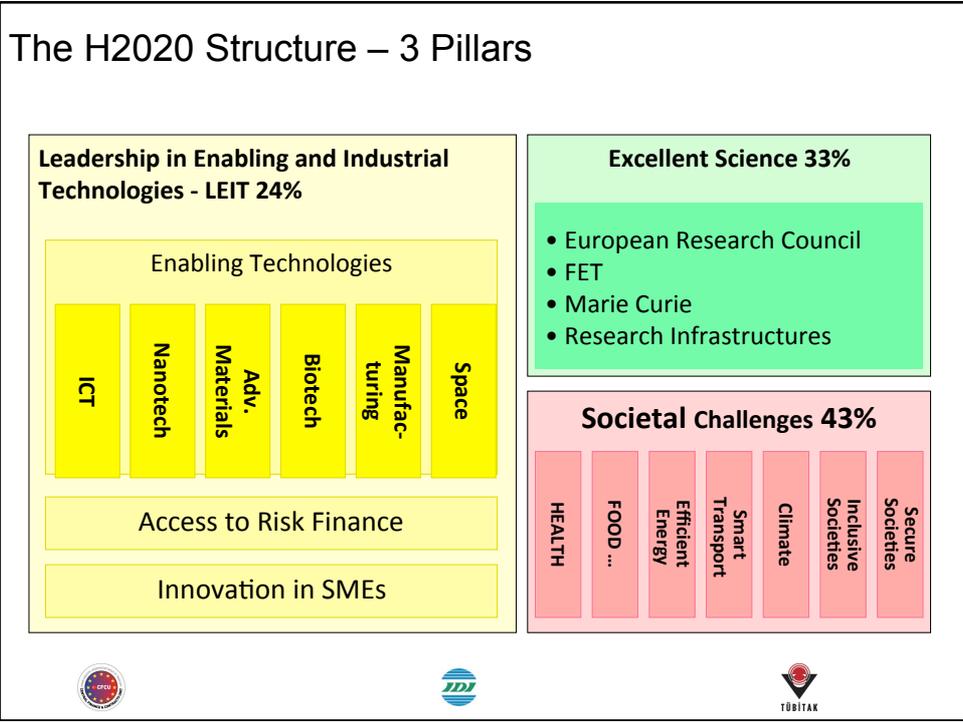
The funding budget is nearly 80 bn Euro.



FP Budget Development

Horizon 2020 has nearly €80 billion Euro of funding available over 7 years (2014 to 2020).





Major changes ?

FP7 was called the
Framework Programme for Research and
Development

H2020 is called the
Framework Programme for Research and
Innovation



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The Innovation Chain

Research &
development

Covered by H2020

Prototyping,
'plans' for new
products

Market
development

Market
replication



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Innovation and the Private Sector

To ensure that innovation is happening in H2020



SME participation become obligatory in most projects. Around 20% of the total budget for Societal Challenges and LEITs must go to SMEs.

This is good news for SMEs, of course !

It is also an important message for universities: purely academic consortia are out !



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Selection criteria

- Operational capacity
Operational capacity means that the applicants must have the professional competencies and qualifications required to complete the proposed project.
- Financial capacity
- Only coordinators of actions worth EU contribution equal or superior to 500.000 EUR will be checked, except specific cases
- No verification for public bodies , entities guaranteed by MS or AC and higher and secondary education establishments



Simplified Funding Model

One reimbursement rate by action

The same rate for all beneficiaries and all activities:

- Up to 100% for Research and Innovation actions
- Up to 70% for Innovation Actions (non-profit entities up to 100%)



Simplified Funding Model

One method for calculation of indirect costs:

- Flat rate of 25% of total direct costs, excluding subcontracting, costs of third parties and financial support to third parties
- If provided in WP, lump sum or unit costs



Eligible costs

Main cost categories:

- Personnel costs
- Costs of subcontracting
- Other direct costs
 - Travel costs and subsistence allowances
 - Depreciation costs of equipment
 - Costs of other goods and services (including non-deductible VAT)



Simplification: Summary

- Single set of simpler and more coherent participation rules
- New balance between trust and control
- Moving from several funding rates for different beneficiaries and activities to just two
- Replacing the four methods to calculate overhead or «indirect costs» with a single flat rate
- Major simplification under the forthcoming financial regulation
- Successful applicants to get working more quickly: time-to-grant of 8 months; exceptions for the ERC and in duly justified cases



Content

A: Money for what: Some underlying principles

- Funding Schemes
- Project types
- Project Activities

B: Understanding Costs: Getting it right

- Some principles
- Financing rules
- Direct and Indirect Cost

C: Payment modalities



Part A Money for What ?



Funding Schemes

Two basic principles govern all H2020 cooperation projects:

1. Collaboration
2. Cost Sharing

Collaborative:

“All the beneficiaries (partners) together form a consortium”



Partners set up a joint financial plan for the execution of the project.



Funding Schemes

This financial plan is the **budget** of the Project.

?

1. It is indicative, i.e. stating the foreseen costs and funding.
2. The total funding requested is the maximum amount that can be paid by the EC. It is in no way a guarantee.
3. The budget can be changed between cost categories and partners.



Funding Schemes: Cost Sharing

Cost Sharing:

The costs incurred for implementing the project are “shared” between the beneficiaries and the EC on the basis of the funding rate.



Only real costs can be claimed !

If you spent less than planned you will receive less funding.

Example: You estimated 5000 Euro for travelling, on 70% funding this would mean 3500 Euro from the EC.

You only spent 3000 Euro at the end of the project, so you will receive 2100 Euro.



Funding Schemes: Cost Sharing

In normal business you make a contract with a client for a specific task and amount of money, and your client has a legal obligation to pay that amount once you fulfilled the contract.

In H2020 a grant from the EC supports your research or development work **up to** a specified amount.

If you need more money than planned to achieve the contractually defined results, it will be out of your own pocket.

... and if you need less, you will receive less!



Types of actions supported by H2020

- **Research and Innovation Actions - RIA**
- **Innovation Actions - IA**
- **Coordination and Support Actions - CSA**
- MSCA Grants
- SME Instrument
- ERC Grants
- ERANET Co-fund
- Pre-commercial procurement Co-fund
- Public procurement of innovative solutions Co-fund
- (SME instrument not for third countries)



Research and innovation actions

- Actions primarily consisting of activities aiming to establish new knowledge and/ or to explore the feasibility of a new or improved technology, product, process, service or solution.
- For this purpose they may include basic and applied research, technology development and integration, testing and validation on a small-scale prototype in a laboratory or simulated environment.



Innovation actions

- Actions primarily consisting of activities directly aiming at producing plans and arrangements or designs for new, altered or improved products, processes or services.
- For this purpose they may include prototyping, testing, demonstrating, piloting, large-scale product validation and market replication.



Coordination and support actions

Actions consisting primarily of **accompanying measures** such as standardisation, dissemination, awareness-raising and communication, networking, coordination or support services, policy dialogues and mutual learning exercises and studies, including design studies for new infrastructure and may also include complementary activities of networking and coordination between programmes in different countries.



Rules of Participation (RIA, IA, CSA)

Minimum conditions

- For standard collaborative actions
 - At least, 3 legal entities, each established in different MS/AC
- For CSA, SME Instrument, programme co-fund, 1 legal entity established in a MS/AC
- For MSCA depending on the type: 1 or 3

Additional conditions

- To be set out in the Work Programme (i.e. number of participants, type of participants, etc.)



Rules of Participation - ERC

- Frontier research,
- Cross disciplinary proposals and pioneering ideas in new and emerging fields, which introduce unconventional and innovative approaches
- Across all fields of research

ERC principles:

- 1 researcher; 1 host institution;
- 1 project; 1 selection criterion: scientific excellence
- No consortia, no networks, no co-financing



Rules: Marie Skłodowska-Curie Actions

Individual Fellowships (IF), the beneficiary shall be a participant located in an EU MS or AC and employing the researcher during the project.

Innovative Training Networks (ITN) at least three beneficiaries located in three different EU MS or AC.

Research and Innovation Staff Exchange (RISE): at least three different countries of which at least two must be EU MS or AC.

Co-funding of regional, national and international programmes (COFUND): legal entities established in an EU MS or AC that fund or manage doctoral programmes or fellowship programmes for researchers.



BUILDING A CONSORTIUM FOR H2020 PROJECT



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HORIZON 2020
ULUSLARARASI BİLİM VE TEKNOLOJİ

WHO CAN PARTICIPATE?

Any company, research centre, organisation or individual

ELIGIBLE COUNTRIES

Member States – 28

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

Switzerland – partial association

Associated countries

Albania, Bosnia and Herzegovina, Former Yugoslav Republic of Macedonia, Iceland, Israel, Moldova, Montenegro, Norway, Serbia, Turkey, Ukraine

All other countries – Third countries





TURKEY
HORIZON 2020
ULUSLARARASI BİLİM VE TEKNOLOJİ

APPLICANTS FROM NON-EU COUNTRIES ARE
FREE TO TAKE PART IN HORIZON 2020

WHAT IS THE QUESTION?







AUTOMATICALLY FUNDED COUNTRIES



Legal entities established in a Member State or Associated Country



Legal entities established in a third countries identified in the Work Programme





Industrialised countries: US, Canada, Australia, Japan....
Emerging economies: Brazil, Russia, India, China, Mexico



Funding is explicitly foreseen in the relevant call text



The Participation is deemed essential for project realisation (case by case assesment)

- outstanding competence/expertise
- access to research infrastructure
- access to particular geographical environment
- access to data



Existing bilateral scientific and technological agreement

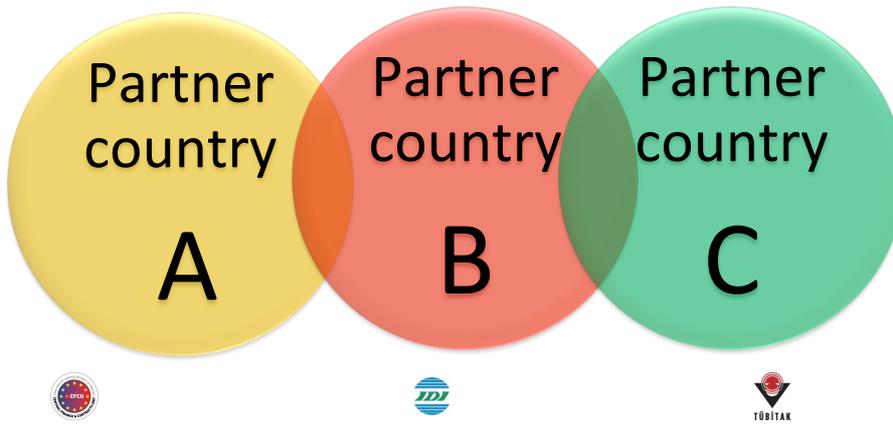
(specific arrenгамents for US partners to be eligible for funding in „Health, demographic change and well-beeing“)





At least three mutually independent legal entities each established in different Member State or Associated Country

AT LEAST



Is the consortium consisting of Turkey, Poland Ukraine and US eligible in H2020?



YES

NO

Is the consortium consisting of France, Germany, Canada and US eligible in H2020?

YES

NO

By way of derogation, the minimum condition shall be participation of one legal entity

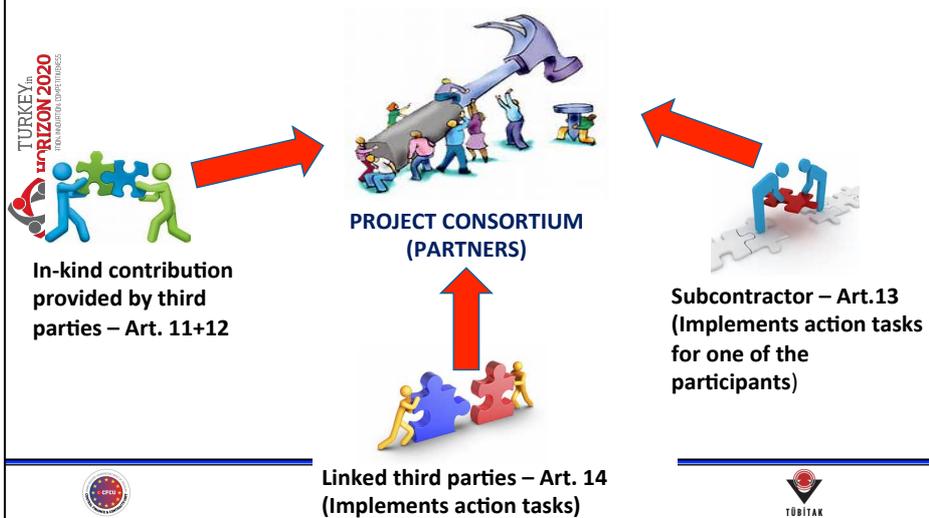
1 legal entity

- Coordination and Support Actions
- Training and Mobility Actions
- European Research Council (ERC) Actions
- SME Instrument

Additional eligibility criteria: possibly applicable in accordance with Work Programme or Work Plan

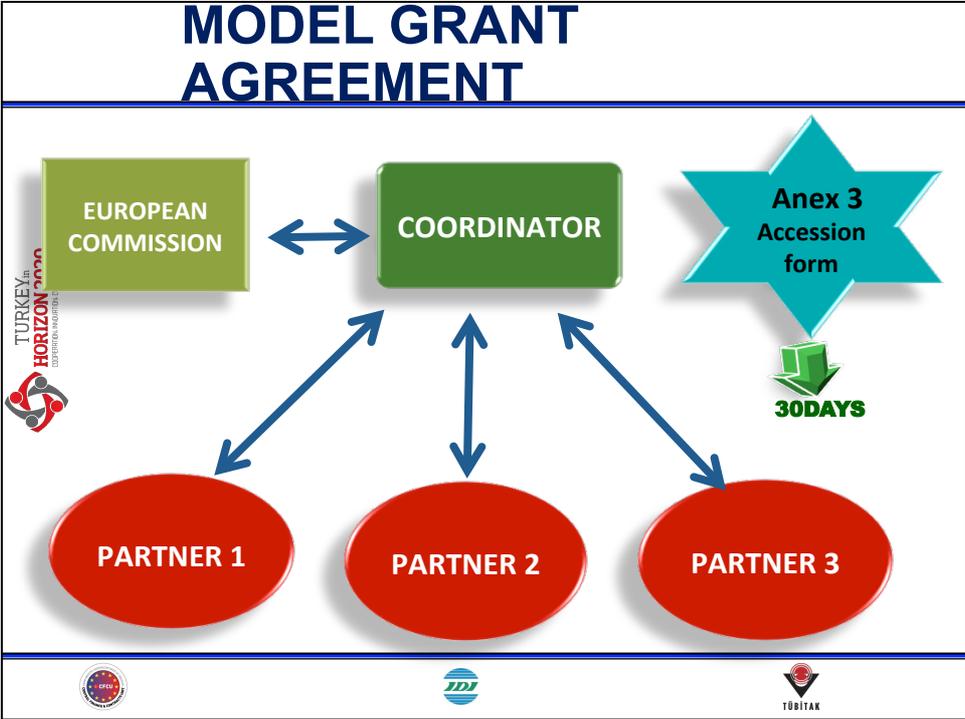


Who else could contribute to the project?



TURKEY **HORIZON 2020**
ULUSLARARASI BİLİM VE TEKNOLOJİ PROGRAMI

MODEL GRANT AGREEMENT AND CONSORTIUM AGREEMENT



MODEL GRANT AGREEMENT

- ✓ Contract between beneficiaries and the funding agency
- ✓ Establishes beneficiaries rights and obligations
- ✓ Includes description of the action
- ✓ Coordinator + rest of beneficiaries
- ✓ Online signature
- ✓ Standard Model Grant Agreement



GENERAL MODEL GRANT AGREEMENT

K
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Research and Innovation actions (RIA)

Aimed to establish new knowledge and/or to explore new or improved technology, product, service, solution or process. May include: basic and applied research, technology development, testing and validation on a small-scale prototype in a laboratory or simulated environment.

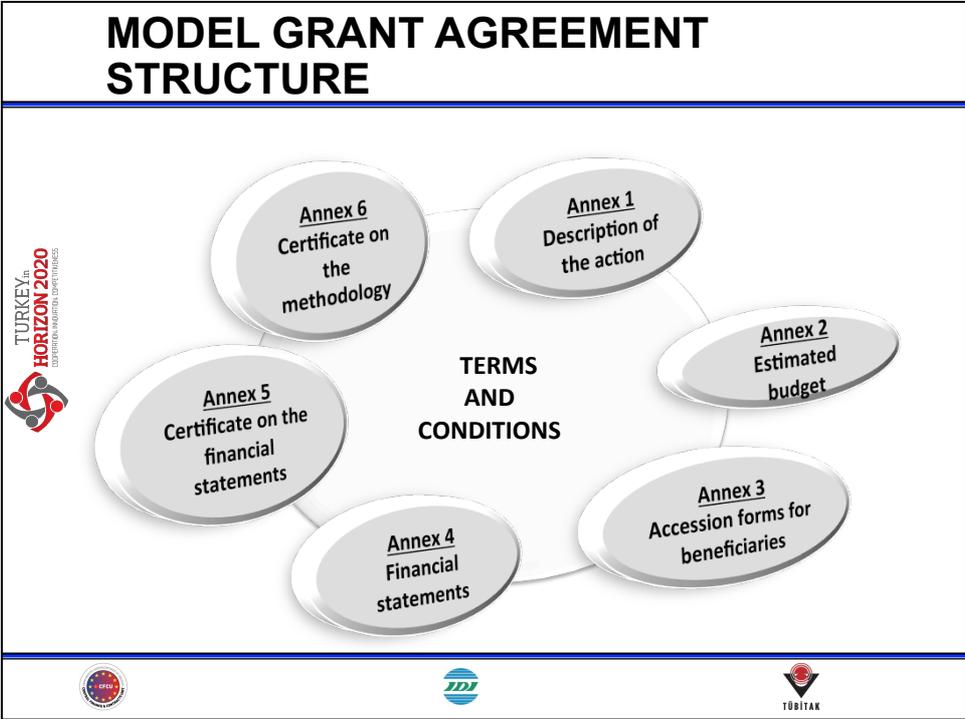
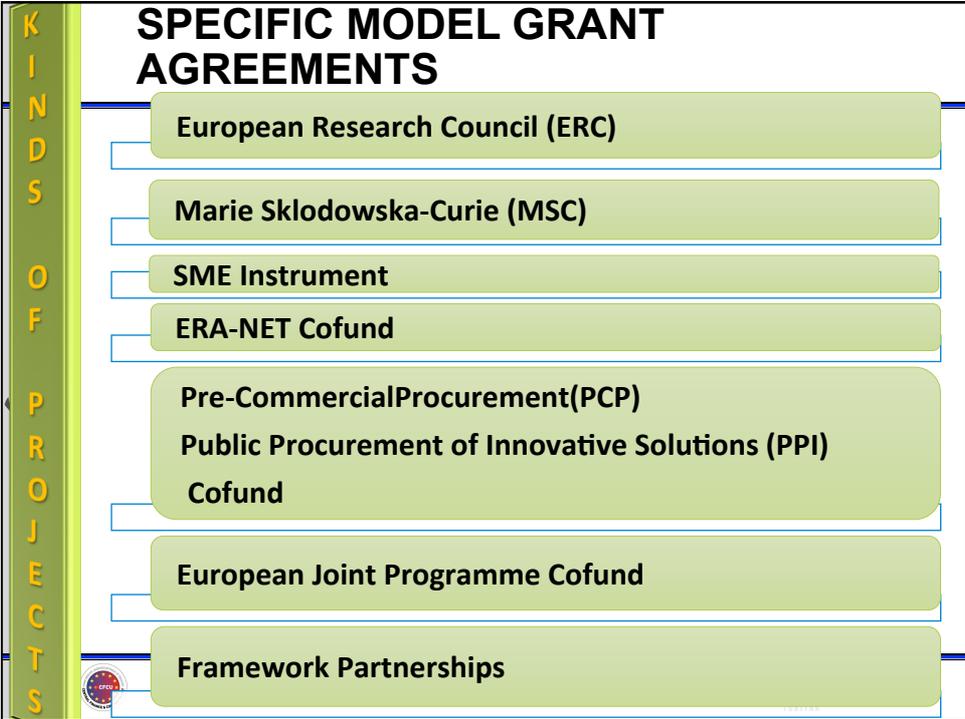
Innovation actions (IA)

Aimed at producing plans and arrangements or designs for new, altered or improved products, processes or services. May include: prototyping, testing, demonstrating, piloting, large-scale product validation and market replication.

Coordination and support actions (CSA)

(standardisation, awareness-raising, networking, policy dialogues, mutual learning exercises etc.)





DETAILED INFORMATION

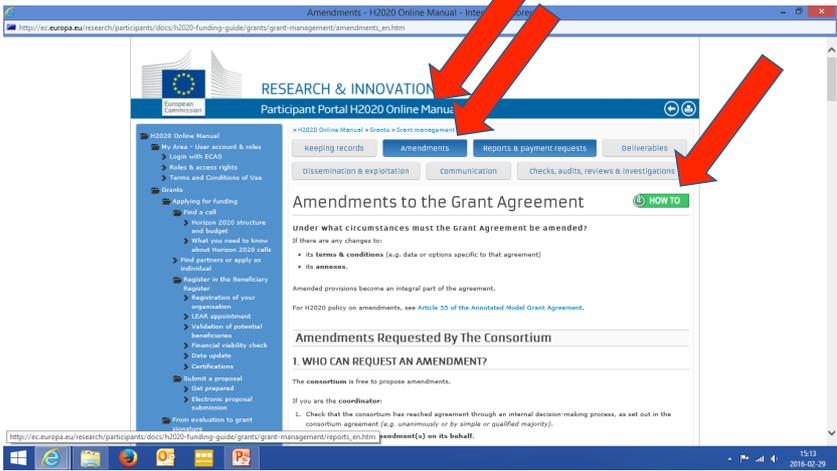


ANNOTATED MODEL GRANT AGREEMENT

http://ec.europa.eu/research/participants/portal/desktop/en/funding/reference_docs.html



AMENDMENT (Article 55 AGA)



The screenshot shows the 'Participant Portal H2020 Online Manual' with the 'Amendments' tab selected. The page title is 'Amendments to the Grant Agreement'. It includes a 'HOW TO' link and a section titled 'Under what circumstances must the Grant Agreement be amended?'. Below this, it lists 'Amendments Requested By The Consortium' and '1. WHO CAN REQUEST AN AMENDMENT?'. The text states: 'The consortium is free to propose amendments. If you are the coordinator: 1. Check that the consortium has reached agreement through an internal decision-making process, as set out in the consortium agreement (e.g. unanimously or by simple or qualified majority); 2. Submit the request to the consortium members (e.g. by email or meeting) and obtain their agreement (e.g. by email or meeting) on its behalf.'



AMENDMENT PROCEDURE

- ✓ Before the end of the project
- ✓ Requested by any of the Parties (funding agency/beneficiaries)
- ✓ Submitted through Electronic Exchange system
- ✓ Reason must be provided
- ✓ Supporting documents
- ✓ Effect on the day agreed by the parties



IS AMENDMENT NECESSARY???

A beneficiary is removed from the consortium

Yes!

A beneficiary is added to the consortium (Annex 3)

Yes!

Coordinator is removed/added

Yes!



 **IS AMENDMENT NECESSARY???**

**The project changes title/acronym
/starting date/duration/
reporting periods** **Yes!**

 **Simple change of name
of the beneficiary** **NO**

**Changes concerning the tasks to
be carried out by *linked third parties*
*subcontractors*** **Yes!**

 **IS AMENDMENT NECESSARY???**

**Simple change of address or other
legal entity data of beneficiaries?** **NO**

 **A significant change of the action tasks
(e.g. if tasks are added/removed)
or of their division among
the beneficiaries** **Yes!**

IS AMENDMENT NECESSARY???
CHANGES TO ANNEX 2



 **Transfer of budget from one beneficiary to another (without change of Annex 1)** 

Transfer of budget from one budget category to another (without change of Annex 1) 



IS AMENDMENT NECESSARY???
CHANGES TO ANNEX 2



 **Budget transfers of amounts between beneficiaries or between budget categories (or both) arising from a significant changes that affects the DOW** 



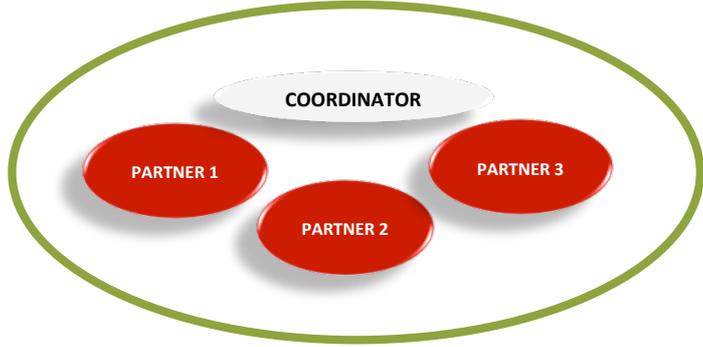


Helpful
Tips

The coordinator can contact the Commission/Agency to ask whether the transfer of budget reflects a significant change in Annex 1 which requires an amendment.



CONSORTIUM AGREEMENT



COORDINATOR

PARTNER 1

PARTNER 2

PARTNER 3

AGREEMENT BETWEEN PARTNERS



CONSORTIUM AGREEMENT



- ✓ Private agreement (partners of the consortium)
- ✓ Provides the legal tool necessary to carry out the project, to organise the consortium and to manage the results
- ✓ Mandatory unless the work programme specifies that there is no need for a consortium agreement
- ✓ Supplements the GA
- ✓ Flexibility



CONSORTIUM AGREEMENT



- ✓ CA cannot contravene GA. In case of discrepancy between CA and GA, GA clauses prevail
- ✓ Flexible document. In force throughout the duration of the project. It must be updated/modified as needed
- ✓ Before the start of the project



CONSORTIUM AGREEMENT

EC guidance

„How to draw up your consortium agreement”

http://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-cons-a_en.pdf



IPR helpdesk <https://www.iprhelpdesk.eu/>



CA MODELS AVAILABLE



<http://www.desca-2020.eu/>

MCARD-2020:

<http://www.digitaleurope.org/Services/H2020ModelConsortiumAgreement.aspx>

EUCAR

<http://www.eucar.be/eucar-model-consortium-agreement-horizon-2020/>



**MANAGEMENT OBLIGATIONS OF
THE COORDINATOR AND OTHER
BENEFICIARIES DERIVING FROM GA
AND CA**









MANAGEMENT OBLIGATIONS



CHAPTER 4 RIGHTS AND OBLIGATIONS OF THE PARTIES

SECTION 1 RIGHTS AND OBLIGATIONS RELATED TO IMPLEMENTING THE ACTION

ARTICLE 7 — GENERAL OBLIGATION TO PROPERLY IMPLEMENT THE ACTION

7.1 General obligation to properly implement the action

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






BENEFICIARY OBLIGATIONS



Each beneficiary must:

- ✓ Keep information stored in the 'Beneficiary Register' (via the electronic exchange system) up to date
- ✓ Inform the coordinator immediately of any events or circumstances likely to affect significantly or delay the implementation of the action
- ✓ Submit to the coordinator in good time:
 - **individual financial statements** and, if required, **certificates on the financial statements**
 - the data needed to draw up the technical reports
 - ethics committee opinions and notifications or authorisations for activities raising ethical issues
 - any other documents or information required by the EC/ Agency under the GA



WHAT ARE THE COORDINATOR'S OBLIGATIONS WHICH MAY NOT BE DELEGATED TO OTHER BENEFICIARY OR SUBCONTRACTED?






- ✓ Monitor that the action is implemented properly
- ✓ Act as the intermediary for all communications between the beneficiaries and the EC/Agency
- ✓ Request and review documents or information from the partners and verify their completeness and correctness before passing them on to the EC/ Agency
- ✓ Submit the deliverables and reports to the EC/ Agency
- ✓ Ensure that all payments are made to the other beneficiaries without unjustified delay






WHO IS RESPONSIBLE FOR COSTS DECLARED BY THE PARTNERS?

(... verify their completeness and correctness before passing them on to the EC/Agency ...)






Each beneficiary remains responsible for declared costs



QUALITY CHECK OF THE DOCUMENTS – HOW TO?



Financial Statements:

- ✓Verify consistency with the action tasks
- ✓Verify their completeness and correctness

Other reports/deliverables

- ✓Are they complete?
- ✓In the right format?
- ✓Is the information related to the project?



BE AWARE:

PROPOSAL PART B BECOMES ANNEX 1 GA



MANAGEMENT OBLIGATIONS



- ✓ Internal organisation of the consortium
- ✓ Distribution of EU funding
- ✓ Foreground and Background
- ✓ Settlement of internal disputes
- ✓ Confidentiality...



INTERNAL MANAGEMENT



- ✓ Internal rules should be clear – do not make it too complex. They should be easy to understand for all the partners
- ✓ Efficient and straightforward decision making structure



INTERNAL MANAGEMENT



- ✓ For internal reporting (if applicable) coordinator is expected to define the procedures at the beginning of the project
- ✓ Allocate important roles in the management structure only to dedicated and responsive partners



EXERCISE 1

Grant Agreement or Consortium Agreement?





Part B

Understanding Costs: Getting it Right

The following does not refer to the MSCA and ERC programmes !



Principles



1. Principle: Be prepared to put some of your own money into a project ! Even if the funding rate is 100% it may not cover all of your cost.
2. Principle: All costs for preparing a proposal have to be borne by the involved partners.
3. Principle: You can only claim costs that are “eligible”



Budget Example

Partner	Direct personnel costs	Other direct costs	Direct costs of subcontracting	Direct costs of providing financial support to third parties	Costs of in kind contributions	Indirect costs	Special unit costs	Total estimated eligible costs	Reimbursement rate	Max Grant	Requested Grant
Partner 1	91,200	108,400	4,000			49,900		253,500	100%	253,500	253,500
Partner 2	142,500	23,400	1,500			41,475		208,875	100%	208,875	208,875
Partner 3	11,000	7,800	34,500			4,700		58,000	100%	58,000	58,000
Partner 4	33,000	9,100	34,500			10,525		87,125	100%	87,125	87,125
Partner 5	10,000	10,400				5,100		25,500	100%	25,500	25,500
TOTALS	287,700	159,100	74,500			111,700		633,000		633,000	633,000



Eligible Costs

In order to be **eligible**, actual costs must be:

- actually incurred by the beneficiary, i.e.:
 - real and not estimated or budgeted and
 - definitively and genuinely borne by the beneficiary
- incurred during the action duration
- entered as eligible costs in the estimated budget of the action
- identifiable and verifiable
- in compliance with applicable national laws on taxes, labour and social security
- reasonable, justified and must comply with the principles of sound financial management, in particular regarding economy and efficiency



Cost Categories

- direct personnel costs
- subcontracting costs
- costs of providing financial support to third parties (if option applies)
- other direct costs, example:
 - (a) Travel and subsistence allowances for staff taking part in the project
 - (b) The purchase cost of durable equipment
 - (c) The costs of consumables and supplies provided they are identifiable and assigned to the project
- indirect costs
- specific categories of costs (if option applies)



Guiding Principle

The guiding principle for all cost calculations is that they must be based on the **beneficiary's normal practices**.





Accounting documentation is necessary only for direct costs. Indirect costs do not need supporting evidence because they are declared using a flat-rate.






Can you claim the personnel costs for the time that you invested to prepare the proposal?

NO, costs related to preparing, submitting and negotiating the proposal are not eligible

WHY ?







Can you claim the costs of drafting Consortium Agreement?

NO, costs of drafting CA are not eligible, as CA should be signed before the project starts.

However costs related to updating the CA are eligible, if incurred during the project duration.



EXAMPLES

Debt and
debt
service
charges

Excessive or
reckless
expenditure

**NON
ELIGIBLE**

Currency
exchange
losses

DEDUCTIBLE
VAT



Direct personnel costs

The main cost categories are:

- costs for employees (or equivalent):
 - basic remuneration (basic salary and complements) and
 - for non-profit legal entities: additional remuneration ('bonus payments')
- costs for natural persons working under a direct contract
- costs for personnel seconded by a third party
- costs for 'beneficiaries that are SMEs for their owners (or natural persons) not receiving a salary'



Direct personnel costs

What are the **Costs for employees** ?

- basic remuneration (basic salary and complements) and
- for non-profit legal entities: additional remuneration ('bonus payments').

What is '**basic remuneration**'?

The 'basic salary' includes (and is limited to):

- the **salary** stated on the beneficiary's payroll
- **social security** contributions
- **taxes and other costs** included in the remuneration.



Direct personnel costs

The '**complements**' may include:

- general contractual complements to the basic salary and
 - [Examples: a 13th month payment; complement for hazardous work or night shifts; transportation allowance, etc.]
- variable complements, if
 - they must be paid for the performance of the usual work, duties or tasks of the employee, on the basis of objective conditions and
 - the amounts and the conditions are established by national law or in the employment contract (or equivalent appointing act) and are in accordance with the internal regulations of the beneficiary.



The cost of personnel assigned to the project

- Personnel must be remunerated in accordance to the normal practices of the beneficiary.
- Only the costs of the actual hours worked by the persons directly carrying out work under the project may be charged. Working time is the total number of hours, excluding holidays, personal time, sick leave, or other allowances.



The cost of personnel assigned to the project

Only the hours worked on the project can be charged. Working time to be charged must be recorded throughout the duration of the project by timesheets.

A simple estimation of hours worked is not sufficient. Productive hours must be calculated according to the beneficiary's normal practices. Some activities may be considered **not** to be part of the productive hours of personnel:

- Training (not project related)
- Internal meetings (not project related)



The costs must be calculated as follows:

{hourly rate * number of actual hours worked on the project}

A nuclear researcher working for a public research laboratory (non-profit) worked:

- 1,600 productive hours
- 800 hours declared for the action (at an hourly rate of EUR 40)
- 400 hours declared for another EU grant
- S/he received eligible additional remuneration of EUR 2,000 for being Head of Project.

Calculation of the personnel costs:

$40/\text{hour} * 800 \text{ h} = 32,000$

Addition of the additional remuneration: = 2,000

Total costs charged to the action for the year:

$32,000 + 2,000 = 34,000$



Calculation of the hourly rate

{actual annual personnel costs (excluding additional remuneration) for the person divided by number of annual productive hours}

For calculating the annual productive hours, the beneficiary must use one of the following three options:

1. 1720 hours for persons working full time ('1720 fixed hours')
2. the total number of hours worked by the person in the year for the beneficiary ('individual annual productive hours')
3. the 'standard number of annual hours' generally applied by the beneficiary for its personnel in accordance with its usual cost accounting practices ('standard annual productive hours').



$$\text{Actual Personnel Cost} = \text{Hours worked for the project} \times \text{Hourly rate}$$

where

$$\text{Hourly rate} = \frac{\text{Annual personnel costs}}{\text{Annual productive hours}}$$

Annual productive hours

Hours per employee in a year after deduction of non productive hours (e.g. annual and public holidays, sick leave, weekends, trainings etc.)



HOW TO CALCULATE ANNUAL PRODUCTIVE HOURS - AGA p. 55-59



 1720 hours

 Individual annual productive hours

 Standard annual productive hours





HOURLY RATE CALCULATION

The hourly rate must be calculated by **financial year** and has to be made always on the basis of full financial years.

When at the end of the reporting period there are months for which the financial year is not closed yet, the beneficiary must use the figures of the last closed financial year available to declare the costs for those months.





Closed financial year

01/10/2015 31/03/2017

Reporting period (example)

2015 **2016** **2017**

used the hourly rate
calculated for year 2016

OPIS:
 Project with 1 reporting period of 18 months from 1.10.2015 to 31.3.2017. The beneficiary's financial year closes on 31 December of every year.
 For the period from 1.10.2015 to 31.12.2015 - on the basis of year 2015
 For the period from 1.01.2016 to 31.12.2016 – on the basis of year 2016
 For the period from 1.01.2017 to 31.03.2017 - used the hourly rate from year 2016





EXERCISE 2

Period for hourly rate calculation









PART 1

From 1.10.2015 to 31.12.2015: on the basis of the year 2015

From 1.01.2016 – 31.12.2016: on the basis of the year 2016

From 1.01.2017 – 31.03.2017: hourly rate for year 2016







PART 2

Calculation for the financial report:

Year 2015

Hourly rate: $32\ 000/1720 = 18,60$ EUR

Amount to be reported: $18,60 \times 430 = 7\ 998$ EUR

Year 2016

Hourly rate: $34\ 400/1720 = 20$ EUR

Amount to be reported: $20 \times 200 = 4\ 000$ EUR

Year 2017

Hourly rate: 20 EUR

Amount to be reported: $20 \times 100 = 2\ 000$ EUR

Total amount to be reported: 13 998 EUR








Are time sheets necessary?

Yes, but for persons working exclusively for the project NO time-sheet is required





PERSONS WORKING EXCLUSIVELY FOR THE PROJECT

For **persons who work exclusively for the action** (regardless if they are full-time or part-time employees), the beneficiary may:

AGA art.18

sign a **DECLARATION** on exclusive work for the action' (one per reporting period), to confirm that the person worked exclusively for the action, either:

- ✓ during the whole reporting period or
- ✓ during a an uninterrupted time-period, covering at least a full natural month within the reporting period.

Sporadic or random periods of 'exclusive' dedication can NOT be subject of a declaration.

If a person worked randomly for the action after an uninterrupted time-period covered by a declaration, time records are needed for the period of random work.








**Helpful
Tips**



Beneficiaries should take a prudent approach and use this possibility only if it is planned that the person works exclusively on the action during a long and continuous period of time. If there are any doubts, a record of actual hours worked should be kept (e.g. time-sheets)





Example - question





The person worked for the action exclusively from 15/02 to 31/05 and then worked again in the action some days in July and October and the full month of November.

*The declaration will cover the period from **15/02 to 31/05** and time records must be kept for the time the person worked for the action in **July, October and November.***







May Teleworking —
(remuneration costs of employees not working on the premises of the beneficiary) be accepted as eligible?

Yes, if it is the beneficiary's usual practice (i.e. if clear rules are available). The system in place must make it possible to both identify and record the hours worked for the action.

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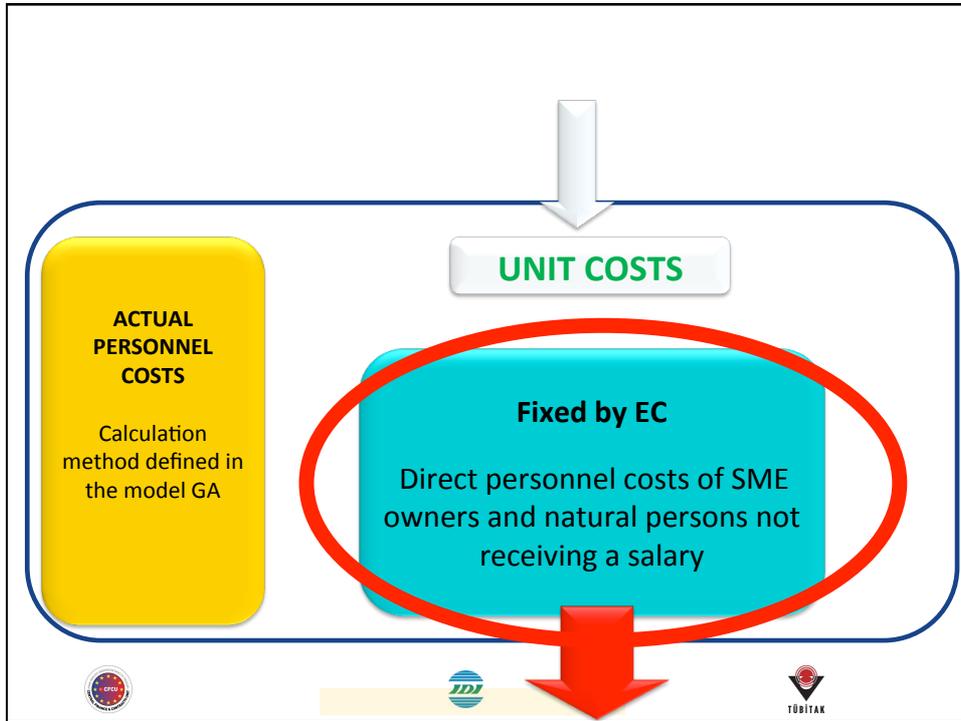

Are recruitment costs eligible?

Recruitment costs are generally not eligible as direct personnel costs, because the beneficiary is required to have the necessary human resources to implement the action. If a beneficiary needs to recruit additional personnel during the action duration, the related costs would be considered part of the entity's normal indirect costs, which are covered in Horizon 2020 by a 25 % flat-rate of the eligible direct costs.

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UNIT PERSONNEL COSTS (AGA p.70)
Costs of beneficiaries that are SMEs for their owners not receiving a salary

What?
 These budget categories cover the costs of SME owners not receiving a salary that worked on the action.
 This includes SME owners who are remunerated/ compensated for their work for the SME by any other means than a salary (*for example, dividends, service contracts between the company and the owner, etc.*).

What not?
 SME owners who receive a salary (registered as such in the accounts of the SME) cannot declare personnel costs under this budget category.

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Logo of the Ministry of National Education, the Ministry of Health, and TÜBİTAK.

UNIT PERSONNEL COSTS (AGA p.70)
Costs of beneficiaries that are SMEs for their owners not receiving a salary

Must be declared on the basis of the unit cost (hourly rate) fixed by Commission Decision C(2013) 819720 and set out in Annex 2 and 2a of the GA.

The precise unit cost is not pre-fixed; the 'amount per unit' (hourly rate) must be calculated for each individual — before signature of the GA — according to the following formula:
 Amount per unit = {{EUR 4,650/143 hours}}
 multiplied by

{country-specific correction coefficient of the country where the beneficiary is established}}

The country-specific correction coefficient is the one set out in the *Main Work Programme — MSCA* in force at the time of the call.

TR – 86,6%

4 027 EUR



Grant Agreement art.13



EXAMPLES OF SUBCONTRACTING

- Contract for (part of) the research or innovation tasks mentioned in Annex 1*
- Testing and analysis of the resistance of a new component under high temperatures, if described in Annex 1 as project task*
- Building of a prototype or pilot plant, if described in Annex 1 as project task*



CHARACTERISTICS OF SUBCONTRACTING

- ✓ Based on 'business conditions'. This means that the subcontractor charges a price, which usually includes a profit
- ✓ Subcontractor works without the direct supervision of the beneficiary and is not hierarchically subordinate to the beneficiary
- ✓ The subcontractor is paid by the beneficiary in exchange for its work



CHARACTERISTICS OF SUBCONTRACTING



- ✓ Concern implementation of project tasks described in Annex 1
- ✓ Only limited part of the action may be subcontracted
- ✓ Indicated in Annex 1
- ✓ Costs must be set out in Annex 2



SUBCONTRACTING



ANNEX 1

- Tasks to be implemented
- Estimation of costs for each subcontract
- Explanation of the need for the subcontract, taking into account the specific characteristics of the project

ANNEX 2

Total estimated costs for subcontracting



BEST VALUE FOR MONEY OR LOWEST PRICE

- ✓ The beneficiaries must base their subcontracts on the 'best value for money' considering the quality of the service proposed or on the lowest price.
- ✓ The best value for money principle does not require competitive selection procedures in all cases. (However, if a beneficiary did not request several offers, it must demonstrate how best value for money was ensured.)
- ✓ For the best price-quality ratio, price is an essential aspect (together with quality criteria, such as technical quality, etc.), but it is not automatically necessary to select the offer with the lowest price.



Should the name of subcontractor be indicated in the Annex 1?



Generally it is not known at this stage, but if the name of the subcontractor is known at the time of the grant signature the beneficiary may indicate it in Annex 1.

However, the fact that the name of the subcontractor is indicated in Annex 1 does not imply the approval of the Commission of the specific subcontractor. For example, if the subcontractor was not selected based on best value-for-money the Commission may reject the costs even if its name was indicated.





Is using framework contracts possible?



Framework contracts can be used for selecting a provider if this is the usual practice of the beneficiary (e.g. for a type of service).

In order to be eligible, the framework contract must awarded on the basis of best-value-for-money and absence of conflict of interest.



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Is subcontracting between beneficiaries eligible?



It is NOT allowed in the same GA. All beneficiaries contribute to and are interested in the action; if one beneficiary needs the services of another in order to perform its part of the work it is the second beneficiary who should declare the costs for that work.



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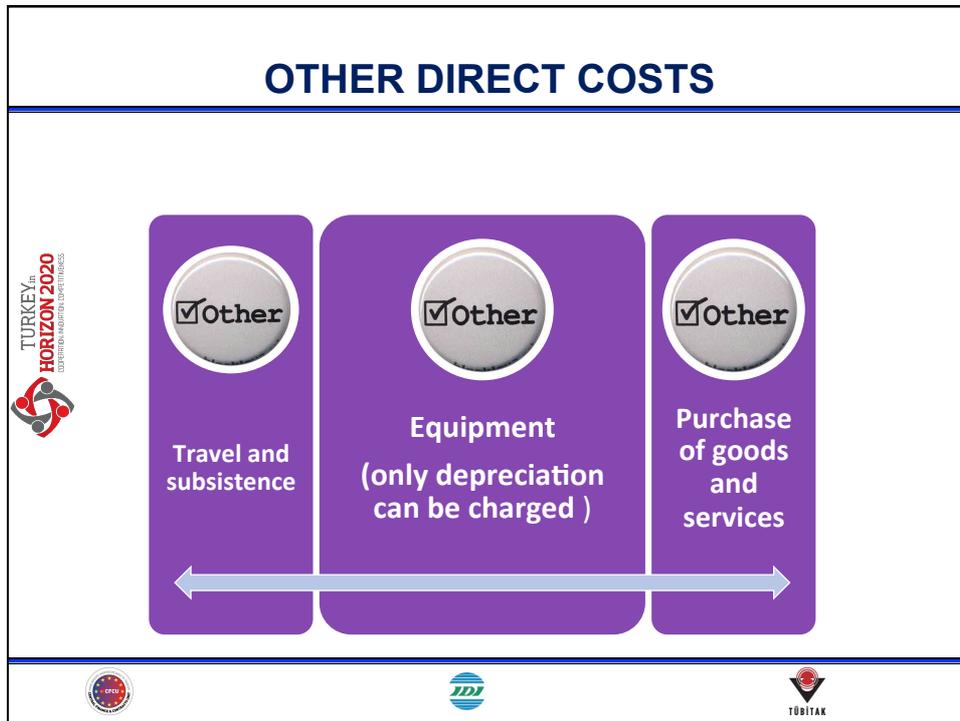
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Travel costs and subsistence allowances

Travel costs must comply with the following conditions for eligibility:

- The travel for which costs are claimed must be necessary for the action. Travel costs related to an event at which the beneficiary carried out work not specifically related to the action are not eligible.
 - All travel costs must be limited to the needs of the action; costs related to extensions (for other professional or private reasons) are not eligible.
 - They must be adequately recorded.
 - be in line with the beneficiary's usual practices on travel
- Logos for TURKEY HORIZON 2020, TUBITAK, and other entities are visible at the bottom of the slide.

Equipment costs

The beneficiaries may declare the following types of equipment costs as 'other direct costs (equipment costs)':

one of the following:

- either depreciation costs of equipment, infrastructure or other assets
- or purchase costs of equipment, infrastructure or other assets (if option applies)

and:

- costs of renting or leasing of equipment, infrastructure or other assets
- costs of equipment, infrastructure or other assets contributed in-kind against payment.



Equipment costs

Equipment costs must be declared as actual costs be written off in accordance with the beneficiary's usual accounting practices and with international accounting standards.

It is expected that the beneficiaries allocate the depreciable amount (purchase price) of an asset on a systematic basis over its useful life (i.e. the period during which the asset is expected to be usable).



Equipment costs

If the beneficiary does not use the equipment exclusively for the action, only the part of the equipment's 'working time' for the project may be charged. The amount of use (percentage and time used) must be auditable.

Depreciation costs for equipment used for the project, but bought before the action start are eligible. These remaining depreciation costs (the equipment has not been fully depreciated before the project's start) may be eligible only for the portion corresponding to the action duration and to the rate of actual use for the purposes of the project.



Durable Equipment

Spectrum Analyser	Purchase Cost:	40,000.00 Euro
	Depreciation Period:	3 Years
	Annual Depreciation:	13,333.33 Euro
<hr/>		
	Project Start:	01 January 2015
	Project End:	31 December 2017
<hr/>		
	Equipment bought:	01 July 2015
<hr/>		
	Cost Claim Project Year 1:	6,666.67 Euro
	Cost Claim Project Year 2:	13,333.33 Euro
	Cost Claim Project Year 3:	13,333.33 Euro
	Total Cost claim:	33,333.33 Euro



Durable Equipment		
	Spectrum Analyser	Purchase Cost: 40,000.00 Euro
		Depreciation Period: 3 Years
		Annual Depreciation: 13,333.33 Euro
		Project Start: 01 January 2015
		Project End: 31 December 2017
		Equipment bought: 01 January 2014
		Cost Claim Project Year 1: 13,333.33 Euro
		Cost Claim Project Year 2: 13,333.33 Euro
		Cost Claim Project Year 3: Euro
		Total Cost claim: 26,666.67 Euro

Costs of other goods and services

- costs for consumables and supplies (e.g. costs of purchasing scientific publications (e.g. books, manuscripts, articles, digital copies, etc.))
- dissemination costs and conference fees for presenting project-related research
- costs of intellectual property rights (IPR), including protecting results and royalties on access rights
- costs for certificates on financial statements (CFS) and certificates on methodology
- translation costs, if translation is necessary for the action's implementation, is justified, etc.

Indirect costs

Indirect costs must be declared on the basis of a flat-rate (new in Horizon 2020!).



They must be calculated by applying a 25% flat-rate to the beneficiary's eligible direct costs, **minus**:

- subcontracting costs
- costs of providing financial support to third parties (if option applies)
- unit or lump-sum costs covering specific categories of costs which include indirect costs.



Budget Flexibility

At the time of reporting, beneficiaries may declare costs that are different from the estimated eligible costs in the budget.



Beneficiaries may transfer budget among themselves or between budget categories without the need of a notification to the EC or an amendment if the action is implemented as originally described. The maximum grant amount can however never be increased.

What can be transferred?

If the incurred eligible costs are lower than the estimated eligible costs, the difference can be allocated to another beneficiary or another budget category.

If the budget transfer is due to a significant change in the planned work, an amendment to the contract is needed.





Is cost of business class plane ticket eligible in the project?

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YES NO **It depends**



May the full price of an asset in one single year be reported?

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As a general rule, beneficiaries cannot charge the total purchase price of equipment to the action, unless the GA explicitly foresees that option.

In the general case beneficiaries may therefore only charge the depreciation costs.





May the depreciation costs for equipment used for the action, but bought before the action start be eligible?



If the equipment has not been fully depreciated before the action's start, the remaining depreciation costs may be eligible only for the portion corresponding to the action duration and to the rate of actual use for the purposes of the action.



May supplies in stock be eligible as a direct costs?



Supplies and consumables which were already in the stock of the beneficiary may be eligible as a direct cost, if they are used for the project.



WHAT ARE THE DIFFERENCES BETWEEN SUBCONTRACTS AND CONTRACTS TO PURCHASE SERVICES?



SUBCONTRACTS	CONTRACTS FOR SERVICES
Concern the implementation of action tasks (as described in Annex 1)	Do not concern action tasks, but they are necessary to implement action tasks by beneficiaries
Must be indicated in Annex 1	Do not have to be indicated in Annex 1
To be declared as „direct costs of subcontracting)	To be declared as „other direct costs”
No indirect costs	25% indirect costs
Best price-quality ratio or lowest price, responsibility for the work lies fully with the beneficiary.	



What is the amount of indirect costs?



Personnel costs: 20 000 €
 Travel costs: 6 000 €
 Goods, services: 14 000€
 Subcontracting: 8 000 €

} Total: 48 000 €
Indirect costs: 25%

12 000 € or 10 000 €





FUNDING LIMITS AND SCHEMES - REMINDER



FUNDING LIMITS



- One project = one rate for all activities in the grant
- Up to 100% of the eligible costs for **research actions**
- but limited to the maximum of 70% for **innovation actions** (exception for non-profit organisations – maximum of 100%)
- Defined in the Work Programme:



FUNDING SCHEMES

- Research and Innovation Actions (RIA)
- Innovation Actions (IA)
- Coordination and Support Actions (CSA)
- SME Instrument

FUNDING LIMITS

TURKEY HORIZON 2020

- Research and Innovation Actions (RIA) **100%**
- Innovation Actions (IA) (non-profit) **100%**
- Innovation Actions (IA) (for-profit) **70%**

FUNDING LIMITS

Coordination and Support Actions (CSA) **100%**

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SME Instrument

Faza 1 RYCZAŁT **50,000** EUR

Faza 2 **70%**



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Part C
Payment Modalities



The Principle

The EC contribution includes:

- a) A single pre-financing payment paid at the start of the project.
- b) Interim payments following each reporting period.
- c) The final payment at the end of the project for the last reporting period plus any adjustment needed.



Payments

The Commission will make the following payments to the coordinator:

- a pre-financing payment at the beginning of the action (to provide beneficiaries with cash to start working on the project and continue until the first interim payment). Pre-financing will not be paid before:
 - the GA is signed (even if the action starts prior to that)
 - the work has started.
- interim payment(s) to cover eligible costs incurred in the reporting periods (as many interim payments as number of reporting periods)
- the payment of the balance after the end of the action.



Payments

- The payments are made to the coordinator; the beneficiaries are not paid individually.
- The coordinator must distribute the amounts received to the beneficiaries — without delay



Interim payments

The interim payment will be made after each reporting period, it is limited to 90% of the maximum grant amount minus the pre-financing.



Interim payments: Example

Grant with three beneficiaries (A, B and C) and three reporting periods.

Maximum grant amount: EUR 1,000,000 at 100%

Pre-financing of EUR 333,334

Costs declared at end of the first reporting period:

500,000 (direct costs) + 125,000 (25% indirect costs) = 625,000

After checking, the EC finds that 20,000 of the direct costs claimed by beneficiary A and 12,000 of those claimed by beneficiary B are not eligible and therefore rejects them:

Reject: 32,000 direct costs +8,000 for indirect costs = 40,000)

Total costs accepted by the EC : 585,000



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Interim payments: Example

Grant with three beneficiaries (A, B and C) and three reporting periods.

Maximum grant amount: EUR 1,000,000 at 100%

Pre-financing of EUR 333,334

Costs declared at end of the first reporting period:

500,000 (direct costs) + 125,000 (25% indirect costs) = 625,000

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Reject: 32,000 direct costs +8,000 for indirect costs = 40,000)

Total costs accepted by the EC : 585,000



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Interim payments: Example

Step 1: application of reimbursement rate:
100% = 585,000

Step2: 90% limit of the maximum grant amount for pre-financing and interim payments = 900,000

1st interim payment to the coordinator is
(900,000 – 333,334) = 566,666

Total accepted eligible costs for 2nd interim period:
162,500

2nd interim payment:
EUR 0 (the 90% limit has already been reached in 1. period).



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The Guarantee Fund

The Guarantee Fund is a mutual benefit instrument establishing solidarity among participants in indirect actions. It replaces the financial collective responsibility between participants in the 6th Framework programme.

The Fund is the property of the beneficiaries. Each beneficiary will contribute to the Guarantee Fund with 5% of the maximum EC contribution. It will be subtracted from the pre-financing and transferred by the Commission.



The Guarantee Fund

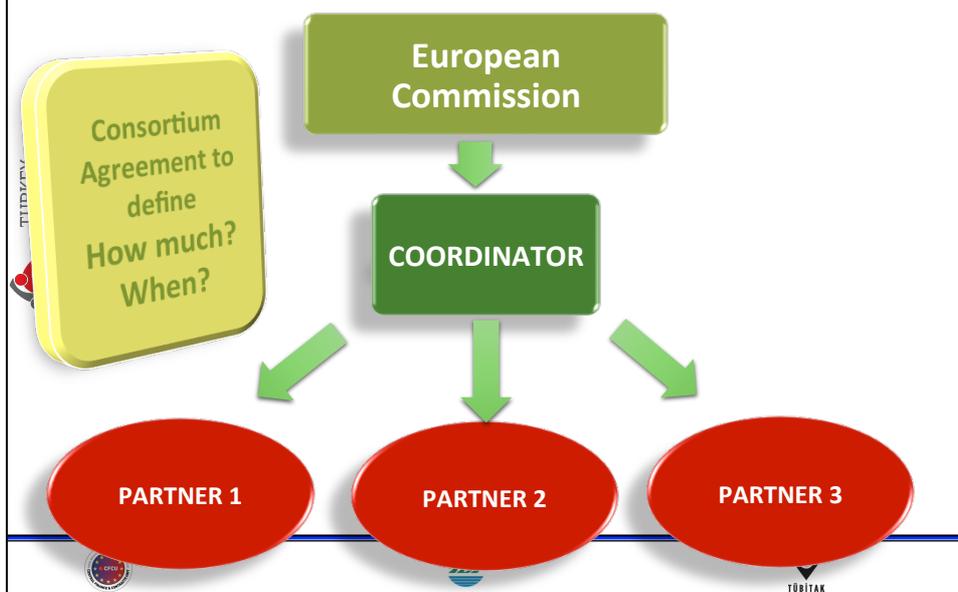
At the end of a project, beneficiaries will recover their contribution. However, if at the time of payment, the fund is in a situation where the interest has been insufficient to cover the losses, a deduction will be made from the amount to be returned.



This potential deduction does not concern public bodies or legal entities whose participation is guaranteed by a Member State or an Associated Country and higher and secondary education establishments.



PAYMENTS



EXERCISE 3

PAYMENTS



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GEMİBİLİMLER VE TEKNOLOJİLER





PRE-FINANCING	<u>1 000 000 EUR</u>
Costs declared by the consortium and accepted by the EC for the 1 st reporting period	800 000 EUR
1 st interim payment	<u>800 000 EUR</u>
Costs declared by the consortium and accepted by the EC for the 2 nd reporting period	1 200 000 EUR
2 nd interim payment	<u>900 000 EUR</u>
Costs declared by the consortium and accepted by the EC for the 3 th reporting period	1 100 000 EUR
Final payment	<u>300 000 EUR</u>





Part 3: Calculating Costs

A: Cost Estimation for the proposal

B: The Project: Cost Reporting: Form C

- Preparing the Cost Statement
- The on-line system

C: Participant's Registration



Part A

Cost Estimation for the proposal



Financial Issues - The Budget

Budget Planning



- How do you come to a realistic budget that covers all your planned costs ?
- Assuming you are a partner in a proposal, which information do you need to provide to the coordinator ?
- The coordinator has to prepare a simple table looking like this:



Financial Issues - The Budget

Partner	Direct personnel costs	Other direct costs	Direct costs of subcontracting	Direct costs of providing financial support to third parties	Costs of in kind contributions	Indirect costs	Special unit costs	Total estimated eligible costs	Reimbursement rate	Max Grant	Requested Grant
Partner 1	91,200	108,400	4,000			49,900	253,500	100%	253,500	253,500	
Partner 2	142,500	23,400	1,500			41,475	208,875	100%	208,875	208,875	
Partner 3	11,000	7,800	34,500			4,700	58,000	100%	58,000	58,000	
Partner 4	33,000	9,100	34,500			10,525	87,125	100%	87,125	87,125	
Partner 5	10,000	10,400				5,100	25,500	100%	25,500	25,500	
TOTALS	287,700	159,100	74,500			111,700	633,000		633,000	633,000	



Financial Issues - The Budget

You have to identify the following figures for your role in the project:

1. Your **Labour rate** without any overheads. This together with the agreed effort for you gives the Direct Personnel Costs.
2. Any **other costs** from your side, e.g. equipment or materials, your estimated **travel costs** for the entire project period. These are then the Other Direct Costs.
3. Subcontracting costs (if any)
4. Indirect Costs are always 25% of Direct Personnel Cost + Other Direct Costs



Financial Issues- The Budget

Estimating your **average labour rate**

- a) Your researchers preparing the proposal must get a good estimation who will be working on the project for how much effort (professor, PhD students, ...).
- b) You as administrators need to provide the salary figures for these categories, including statutory cost but not overheads. Take into account possible salary increase over the next 4 years ! Do not over or under-estimate this!
- c) With these figures you come to an average labour rate to be used for the calculation of the Personnel Costs



Financial Issues - The Budget

Note: The EC will not check if these figures are correct when you submit the proposal, nor during contract negotiation !

But when you do your first financial report after 12 or 18 months work in the project, you may have a problem:

You now declare **real cost**, not any more averages and if the real cost differ too much from your estimates, the total EC contribution may be less than expected or you may have to put effort into the project on your own cost.






Financial Issues - The Budget

Originally Overestimated	Estimated average labour rate	Real labour rate	Allocated effort in the project (PM)	Total Personal Cost	Requested EC Contribution (100%)	Difference in EC Contribution
Originally Underestimated	8,000		40	320,000	320,000	320,000
		5,000	40	200,000		120,000
		10,000	40	400,000		-80,000

You cannot just do more (38%) or less (25%) work just to fit the original budget !





HOW TO FILL IN BUDGET TABLE IN THE PROPOSAL PHASE



COLUMN A – DIRECT PERSONNEL COSTS

COLUMN B – OTHER DIRECT COSTS

COLUMN C – DIRECT COSTS OF
SUBCONTRACTING



COLUMN D – FINANCIAL SUPPORT TO THIRD PARTIES

- ✓ **To be used only where this is explicitly allowed in the work programme**
- ✓ May be given via a financial donation to natural persons (e.g. allowance, scholarship, fellowship) or legal persons (e.g. non-repayable financial assistance to local NGOs).



Examples:

An innovation project in the area of sustainable agriculture and forestry includes financial support for end-users (farmers) testing the technology developed within the action.

One of the work packages in Annex 1 includes funding for awarding three research scholarships in the field of the action.



COLUMN G – SPECIAL UNIT COSTS COVERING DIRECT AND INDIRECT COSTS

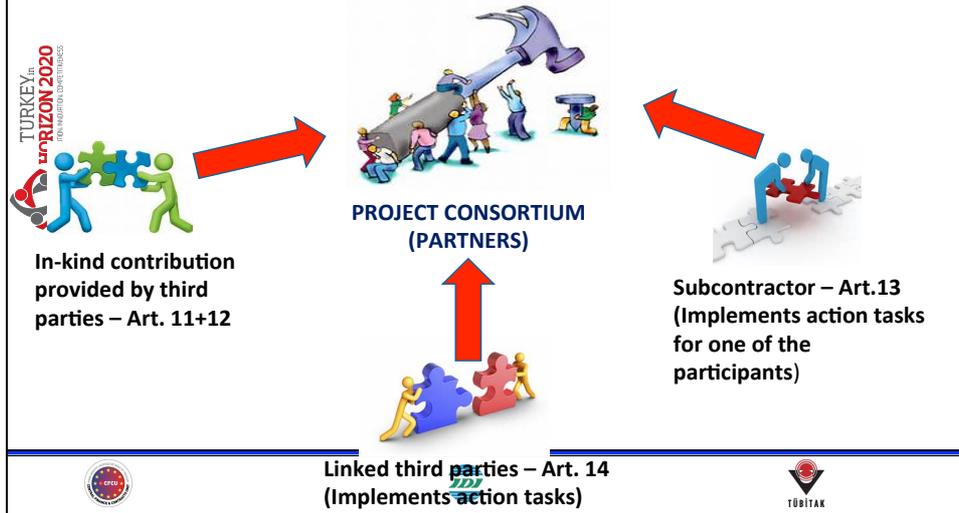
To be used only where foreseen in the work programme



- 1) Access costs for providing trans-national access to research infrastructure - Decision C(2013) 8199
- 2) Costs of energy efficiency measures in buildings – Decision C(2013) 8196
- 3) *Costs of clinical studies – Decision C(2014)1393*



Who else could contribute to the project?



PROJECT PROPOSAL

Consider if subcontracting and/or other third parties shall be involved in the project

Explain planned involvement of third parties in the proposal



4.2. Third parties involved in the project (including use of third party resources)

Please complete, for each participant, the following table (or simply state "No third parties involved", if applicable):

Does the participant plan to subcontract certain tasks (please note that core tasks of the project should not be sub-contracted)	Y/N
<i>If yes, please describe and justify the tasks to be subcontracted</i>	
Does the participant envisage that part of its work is performed by linked third parties ⁹	Y/N
<i>If yes, please describe the third party, the link of the participant to the third party, and describe and justify the foreseen tasks to be performed by the third party</i>	
Does the participant envisage the use of contributions in kind provided by third parties (Articles 11 and 12 of the General Model Grant Agreement)	Y/N
<i>If yes, please describe the third party and their contributions</i>	

LINKED THIRD PARTIES

Who can be a linked third party?

- ✓ Affiliated entities
- ✓ Entities with a legal link to a beneficiary (e.g. Joint Research Units, associations, foundations or other legal entities composed of members)

The entity carrying out the majority of the work should be the beneficiary.



LINKED THIRD PARTIES



- ✓ Linked third parties and the tasks to be implemented by them must be set out in Annex 1
- ✓ The beneficiary is responsible for the linked third party work
- ✓ Declare their own costs in their own financial statement
- ✓ The same cost eligibility conditions as for beneficiaries apply



IN KIND CONTRIBUTIONS



- ✓ A third party provided in kind contribution to a beneficiary (but is not otherwise involved in the project)
- ✓ In-kind contribution may be provided free of charge or against payment
- ✓ Only actual costs are eligible (no profit!)

For example: seconded personnel or use of equipment (infrastructure)



INDIRECT COSTS OF IN-KIND CONTRIBUTION

The eligibility of indirect costs depends on where the in-kind contribution is used:

- On the premises of the beneficiary** – beneficiary receives flat rate of 25%
- On the premises of the third party** – the direct costs actually incurreds by the third party may be increased by a flat rate of 25% (therefore the costs of the in-kind contribution are NOT taken into account when calculating the indirect costs of the beneficiary) - COLUMN E.



Participant	Country	(A) Direct personnel costs/ €	(B) Other direct costs/ €	(C) Direct costs of subcontracting/ €	(D) Direct costs of providing financial support to third parties/ €	(E) Costs of in kind contributions not used on the beneficiary's premises / €	(F) Indirect costs/ € (=0,25(A+B-E))	(G) Special unit costs covering direct and indirect costs	(H) Total estimated eligible costs/ € (A+B+C+D+F+G)	(I) Reimbursement rate	(J) Max.grant/ € (=H*I)	(K) Requested grant/ €
Total												

Separate column for „financial support to third parties” – other costs of third parties are to be presented under the „regular” costs of the beneficiary.



INFO FOR EXERCISE 4

TURKEY
HORIZON 2020
GÜVENLİ VE AKIL KULLANIMLI

Certificate on the financial statements

325 000 €

- If a beneficiary requests a total contribution of 325 000 EUR or more, as reimbursement of actual costs.



EXERCISE 4

BUDGET TABLE

TURKEY
HORIZON 2020
GÜVENLİ VE AKIL KULLANIMLI



(A) Direct personnel costs/ €	(B) Other direct costs/ €	(C) Direct costs of subcontra cting/ €	(D) Direct costs of providin g financial support to third parties/ €	(E) Costs of in-kind contributi ons not used on the beneficiary's premises/ €	(F) Indirect costs/ € (=0,25(A +B-E))	(G) Special unit costs covering direct and indirect costs	(H) Total estimated eligible costs/ € (A+B+C+D +F+G)	(I) Reimbu rsement rate	(J) Max.grant/ € (=H*I)	(K) Requested grant/ €
240 000	27 000 10 000 1 000 160 000 2000	50 000			110 000		600 000	100%	600 000	600 000
240 000	200 000	50 000			110 000		600 000		600 000	600 000



What would be the difference in case of Innovation project (IA) ?





Part B

The Financial Report



Collecting the data

Data needed for financial reporting:

1. Names and hours worked of all scientific and technical staff directly involved in the project.
Note: Admin staff of the organisation is normally covered by the indirect cost and their hours are NOT reported.
2. All other project related cost such as travel expenses, invoices for material and equipment, etc.



Currency Exchange

Beneficiaries must always use euros, to report costs in their financial statements.

Conversion of costs should be done by one of the following:

1. The daily euro exchange rate is published by the EC: using the average of the daily exchange rates published over the corresponding reporting period. To calculate this rate, you may use the editable charts on the ECB website

<http://www.ecb.europa.eu/stats/exchange/eurofxref/html/index.en.html>

Procedure for calculating the rate on the ECB website:

Step 1— Go to the ECB website.

Step 2— Click on the chart corresponding to your currency.

Step 3 — Choose the start and end date of the period for which the average daily exchange rate is calculated (i.e. the reporting period) by using the sliding tool in the second table.



Currency Exchange

If NO daily euro exchange rate is published

2. Using the average of the monthly exchange rates over the corresponding reporting period, using the currency converter on the Commission's website

http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm

Example: A Moldovan university with accounting in Moldovan Lei (MDL) is the beneficiary of a project with one reporting period, from 24.01.2013 to 23.01.2014. The costs incurred in MDL during this period are MDL 500 000. The university will calculate the average of the 13 monthly exchange rates (January 2013 until January 2014) published on the Commission's website. This average rate is MDL 16 .7531 for EUR 1. The university will report costs of EUR 29 845, 22 (MDL 500 000 / 16 .7531).



Timesheet example

Person : P Miller

Number of hours envisaged i.e. according to the

2015 January

Indicate the time in hours Only the yellow cells are writeable

Date	0	0	0	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Day	Sun	Mo	Tue	Wed	Thu	Fri	Sat	Sun	Mo	Tue	Wed	Thu	Fri	Sat	Sun	Mo	Tue	Wed	Thu	Fri
EU-Projects																				
LC Energy									5	4	5	7	7				8	5	4	
Green Cars								3	4	3										
0																				
Total RTD	0	0	0	0	0	0	0	0	8	8	8	7	7	0	0	8	5	4	0	
Internal and other projects																				
Management Bord													1	1				3	4	
0																				
0																				
Total	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0	3	4	0	
Absences																				
Annual Leave																				
Special Leave																				
Illness																				
Total Absences	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
productive hours	0	0	0	0	0	0	0	0	8	8	8	8	8	0	0	8	8	8	0	
Total hours																				



Personnel Cost summary

List all staff members (based on 140 hours/month):

WP	Person Name	Position	Hours worked	Person Months	Cost per hour	Personnel Amount	Monthly Rate
WP1	P Miller	Dean	130.000	0.929	50.45	6,558.50	8,879.20
WP2	John O'Neil	Reseracher	195.600	1.397	45.78	8,954.57	8,057.28
WP3	Chris Burden	PhD Student	80.400	0.574	25.23	2,028.49	4,440.48
WP4	Chris Burden	Director	294.000	2.100	25.23	7,417.62	4,440.48
WP5	John O'Neil	Director	131.000	0.936	45.78	5,997.18	8,057.28
WP6	P Miller	Dean	89.000	0.636	50.45	4,490.05	8,879.20
WP4	P Miller	Dean	210.000	1.500	50.45	10,594.50	8,879.20

... and then for each prepare the input figures for the Form C

WP1	P Miller	0.929 person-months. Salary/hour: 50.45 Cost: 6559.00
WP2	John O'Neil	1.397 person-months. Salary/hour: 45.78 Cost: 8954.57
WP3	Chris Burden	0.574 person-months. Salary/hour: 25.23 Cost: 2028.49
WP4	P Miller	1.500 person-months. Salary/hour: 50.45 Cost: 10595.00
WP4	Chris Burden	2.100 person-months. Salary/hour: 25.23 Cost: 7417.62



Other direct cost and Subcontracting

Travel details:

WP	Name of person who travelled	Destination (City / Country)	Date of travel from - to	Purpose of travel	Amount
WP1	P Miller	London, UK	16/12/15 - 18/12/15	Management Meeting	1,200.41

Other costs:

OTHER SPECIFIC PROJECT COSTS

WP	Service Provider/ Vendor	Description	Date of invoice	Amount
WP5	Internet Provider	Domain name renting, server renting	30/11/15	465.19

Subcontracting:

SUBCONTRACTING

WP	Subcontractor Org. and person name	Description	Date of invoice	Amount
WP3	Energy Survey Inc, N. Meyers	Market Analysis	15/4/2015	3250.00



On-line reporting

On the Participants Portal under "My Projects" you will get the list of projects for your institution, for example:

Legend

AA Access Amendment	GP Grant Preparation	MP Manage Projects	FR Financial Reporting
PR Periodic Reporting	RD Reporting & Deliverables	PC Project Consortium	VP View Proposal

Show entries EXCEL Search:

ACRONYM	CALL	PROG	PROJECTID	ROLES	PHASE	ACTIONS
EU-JordanNet	FP7-INCO-2009-2	FP7	244082	PC	Grant Management	FR RD
EU-JordanNet II	FP7-INCO-2012-2	FP7	311910	PC	Grant Management	FR RD
JOIN-MED	FP7-ICT-2007-3	FP7	231550	PC	Grant Management	PR
MED-Dialogue	FP7-ICT-2013-10	FP7	611433	PC	Grant Management	AA VP

Showing 1 to 4 of 4 entries. ← PREVIOUS 1 NEXT →

C: Best Practice Tips

Remember: Proposals are initiated (and written) by your researchers, not by you as administrators.

But the researcher rely on you to provide them with the admin data needed for the proposal:

- Staff salaries and categories
- Travel cost calculation

So the first thing for you to do is register your organisation with the URF and get your PIC.



C: Best Practice Tips

Once a project is running with your organisation:
Establish internal administration procedures with your scientific team:

- Collect the timesheet information on a monthly basis (who worked for how many hours)
- Collect all invoices for travel, material, equipment
- Follow up all expenditures, using the cost categories of H2020, again on a monthly basis

With this information preparing the Financial Report for the EC will be easy!





Annex 5

325 000 €

Certificate on the financial statements

With final report

- If a beneficiary requests a total contribution of 325 000 EUR or more, as reimbursement of actual costs and personnel costs declared on the basis of unit costs calculated according to its usual cost accounting practices.





CERTIFICATE ON THE FINANCIAL STATEMENTS



Cost based on:

Lump sums

Flat rates (e.g. indirect costs)

Unit costs (other than those for personnel costs calculated according to the beneficiary usual cost accounting practices)

ARE NOT COUNTED FOR THE EUR 325 000 TRESHOLD AND DO NOT NEED TO BE COVERED BY THE CERTIFICATE





CERTIFICATE ON THE FINANCIAL STATEMENTS (AGA p. 170-172)

The certificate must be issued by an external auditor.
Only qualified auditors may issue a certificate.

'Qualified' means qualified in accordance with national legislation implementing Directive 2006/43/EC or any EU legislation that replaces this Directive (AGA p. 171)



FOR PUBLIC BODIES

The certificate may be issued by an independent public officer with formal competence to audit the beneficiary



EXERCISE 5

CERTIFICATE ON THE FINANCIAL STATEMENTS



Actual personnel costs	200 000 EUR
Unit personnel costs for SME owners	10 000 EUR
Depreciation costs of equipment	30 000 EUR
Subcontracting costs	100 000 EUR
Indirect costs	60 000 EUR
Total costs claimed	400 000 EUR
The certificate on the financial statement will cover 330 000 EUR	





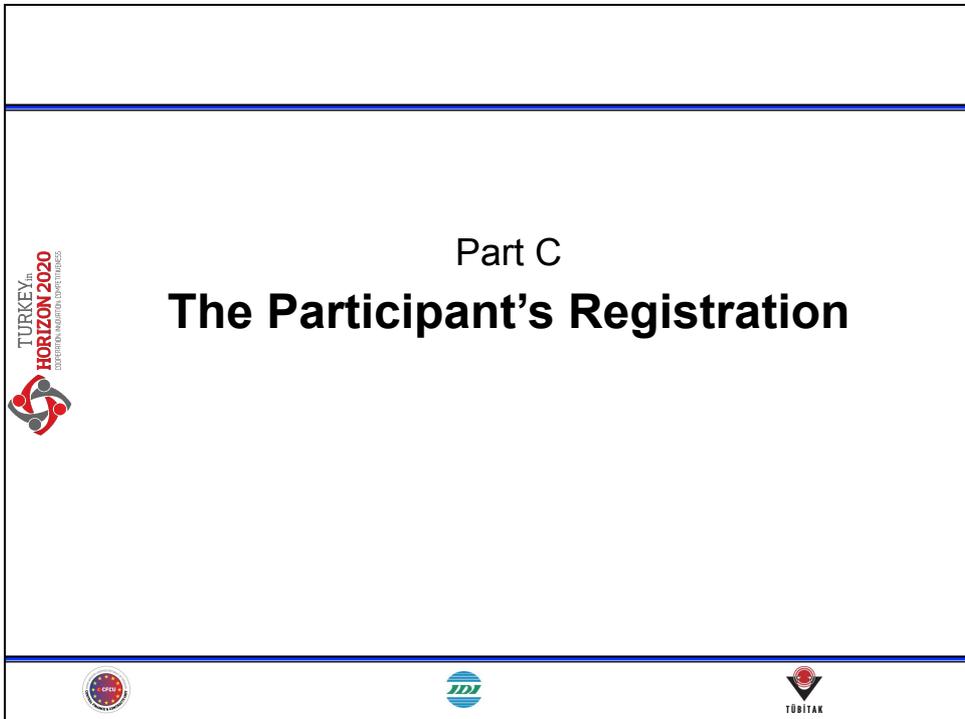
AUDITS

During the implementation of the project or up to 2 years after the payment of the balance

- On proper implementation of the action and compliance with the obligation under the GA
- Using the Commission/Agency staff or external persons or bodies appointed to do so







Registering in the Beneficiary Register

Before submitting a proposal all consortium members must register in the 'Beneficiary Register' of the Participant Portal (in particular, name, address, legal representatives, legal form and organisation type).

If you are already registered for FP7 you do not have to register again.

At the moment of the registration, you will receive a temporary (non-validated) 'Participant Identification Code (PIC)'. The temporary PIC becomes final once you are validated.



The H2020 Online Manual

The EC has provided a comprehensive on-line manual addressing all administrative aspect of H2020:

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/index_en.htm

This describes in detail – amongst many other issues – how to register.



The screenshot displays the 'RESEARCH & INNOVATION Participant Portal H2020 Online Manual' interface. The breadcrumb trail indicates the current location: '> H2020 Online Manual > Grants > Applying for funding > Register in the Beneficiary Register >'. The main content area shows a process flow for 'Registration of organisation' with the following steps: 'Registration of your organisation' (highlighted in blue), 'Validation of organisation', 'LEAR appointment', 'Financial viability check', 'Data update', and 'Certifications'. A 'HOW TO' button is visible in the bottom right corner of the main content area. The left sidebar contains a navigation menu with categories like 'My Area - User account & roles' and 'Grants', with 'Register in the Beneficiary Register' expanded to show 'Registration of your organisation' as the active item. Logos for the European Commission, TUBITAK, and other partners are visible at the bottom of the page.

LEAR appointment

Once your organisation has been validated, you must appoint a representative (LEAR) - typically someone involved in the organisation's central administration.



This LEAR (Legal Entity Appointed Representative) must be authorised to manage the **legal and financial information** about his/her organisation on the Participant Portal, and to **manage access rights** of persons in his/her organisation and to appoint representatives of his/her organisation to electronically sign grant agreements or financial statements via the Participant Portal.



Rights and responsibilities of the LEAR

The LEAR:

- is the only person who can provide updates to information and supply relevant documents about the organisation - via the Participant Portal
- ensures your validated information is up-to-date
- can view and download all documents related to your organisation's legal and financial data and H2020 status
- grant other colleagues access to the organisation's online account as 'Account Administrators'
- has an overview of all the projects and proposals the organisation is involved in, and the role colleagues have in those projects



Rights and responsibilities of the LEAR

The LEAR (cont'd):

- can - indirectly via the Helpdesk - correct inaccurate information about who has which role
- can authorise people to sign grant agreements as 'Legal Signatories' (**LSIGN**) and
- to sign financial statements (Forms C) as 'Financial Signatories' (**FSIGN**) and keep these lists - at all times - up-to-date





ROLES AND ACCESS RIGHTS IN ELECTRONIC EXCHANGE SYSTEM

Roles and access rights restrict the information a user can view and the tasks they can perform.

(For instance, only a person with the coordinator role can delete a draft project proposal).



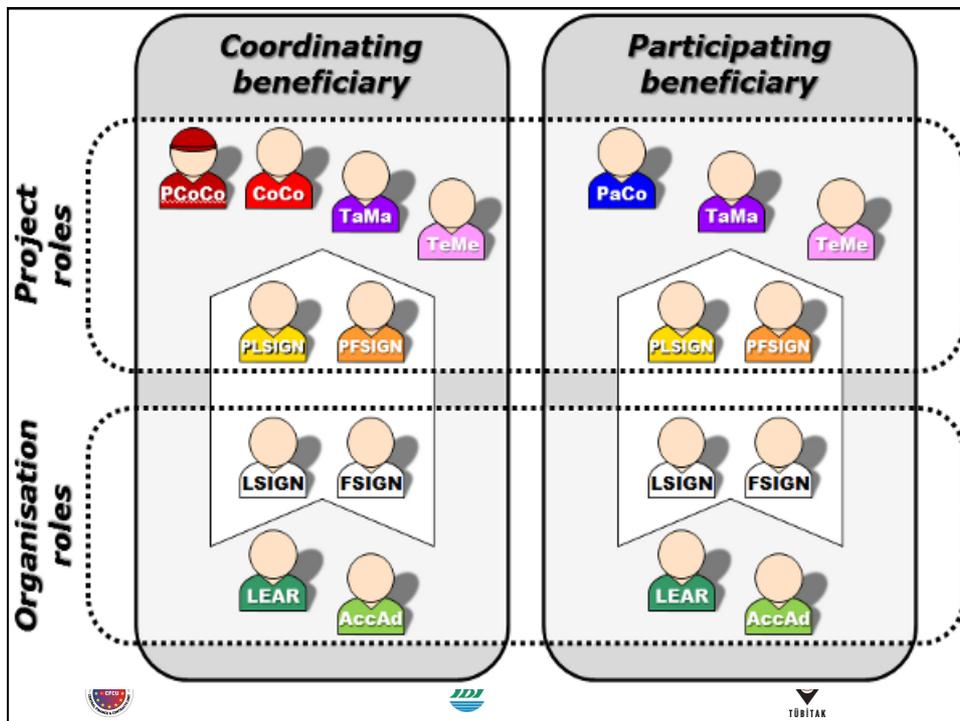
HOW ARE THE ACCESS RIGHTS MANAGED?

Roles are divided into 2 main sections:



- ✓ **Organisation roles** are linked to the whole entity and its data (but without any access to the projects)
- ✓ **Project roles** are defined project by project and cover all possible cases for allowing access to a project's data (read/write/submit)





HOW ARE THE ROLES ASSIGNED?

Most of these roles can be freely assigned and managed by the organizations and consortia, according to their needs:

- ✓ You can start creating a proposal yourself
- ✓ You can be invited by other users - who have created a proposal - to join their proposal
- ✓ Persons in your organization can give you (and revoke) access to roles of your organization
- ✓ Persons involved in on-going grants can give you (and revoke) access to roles in their grants



Exceptions

The Commission needs to intervene in the assignment of the following 2 key roles:

LEARs are validated by the Validation Services of the Commission (*organization role*)

Primary Coordinator Contact (PCoCo - *project role*) is nominated for each project as the main contact point between the consortium and the Commission for a particular grant. By default this is the proposal initiator in the submission phase.



Legal Entity Appointed Representative (LEAR)

- ✓ Parallel to the validation of your organization in the beneficiary register, you must appoint a LEAR
- ✓ LEAR must be appointed by the legal representative of your organization
- ✓ LEAR function is typically performed by an administrative staff member in the organization's central administration



Legal Entity Appointed Representative (LEAR)

LEAR is the main administrative contact between an organization and the Commission.



- ✓ Update their organisation's data on the Participant Portal
- ✓ Appoint (/revoke) Account Administrators within their organisation to help LEARs in their work
- ✓ Appoint (/revoke) representatives of their organisation to electronically sign a grant agreement (L-SIGN)
- ✓ Appoint (/revoke) representatives of their organisation to electronically sign financial statements for project costs (F-SIGN)
- ✓ Has an overview of all the projects and proposals the organisation is involved in, and the role colleagues have in those projects



ACCOUNT ADMINISTRATOR



- ✓ LEAR may delegate tasks to one or more Account Administrators.
- ✓ If the organization nominates a new person as its LEAR, the existing Account Administrators remain and can be revoked by the new LEAR
- ✓ An organization can have an unlimited number of Account Administrators



LEGAL SIGNATORY (LSIGN)

- ✓ Person who has the right to sign grant agreements, amendments and declarations of honour on behalf of the organization.
- ✓ LSIGNs must be nominated for an organization by LEAR or Account Administrator
- ✓ LSIGN can be assigned to a particular project by a Coordinator Contact or a Participant Contact . Only after becoming a PLSIGN in this way can an LSIGN appointed to a project sign a grant agreement for a particular project
- ✓ An organization can have an unlimited number of LSIGNs.
- ✓ More than one LSIGN can be linked to a project and all will be notified when a declaration on honour, grant agreement or amendment is due for signature but only one LSIGN is required to sign the document (the one signing first)



FINANCIAL SIGNATORY (FSIGN)

- ✓ Person who has the right to sign financial statements (Forms C) for grants on behalf of the organization
- ✓ FSIGNs must be nominated for an organization by the LEAR or an Account Administrator .
- ✓ The FSIGN must be linked to a particular project (becoming a PFSIGN) in order to sign the financial statement for that project.
- ✓ FSIGN can be assigned to a particular project by a Coordinator Contact or a Participant Contact
- ✓ An organization can have an unlimited number of FSIGNs.
- ✓ More than one FSIGN may be linked to a project and all will be notified when a financial statement is due for signature even though only one FSIGN is required to sign the financial statement (the one signing first).







When nominating Financial or Legal Signatories, the **LEAR can add comments** that help project participants select the right FSIGN or LSIGN for their project. e.g.

"Mr Smith can sign for projects run by Department X from 1 February 2014."

These optional comments are useful for defining the scope of responsibilities or duration of FSIGNs or LSIGNs in large organizations with different departments or institutes







*Who can be appointed by LEAR?
Who can be appointed by AccAd*

Organisation level


→





in own organisation


→




in own organisation





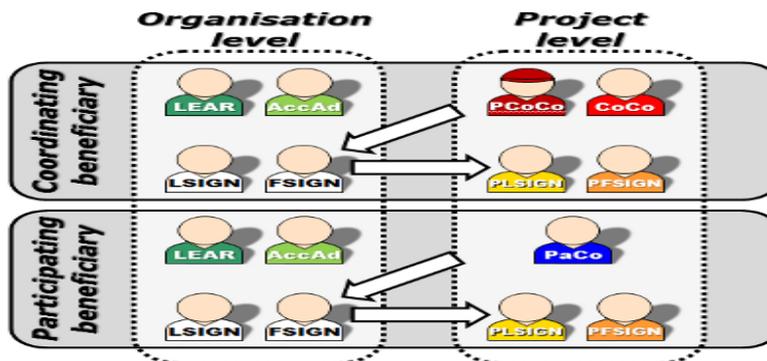
WHAT IS THE ROLE OF SELF REGISTRANT?



- ✓ Self-registrant is a person who first registers an organization in the Commission
- ✓ Before the LEAR is validated, Self-registrants can provide the Commission with requested information and documents about their organization
- ✓ Once the LEAR has been formally validated by the Commission (normally after the organization has been validated as a legal entity), the role of Self-registrant is revoked and replaced by the LEAR



WHO assigns the Legal Signatories and Financial Signatories to a particular grant?



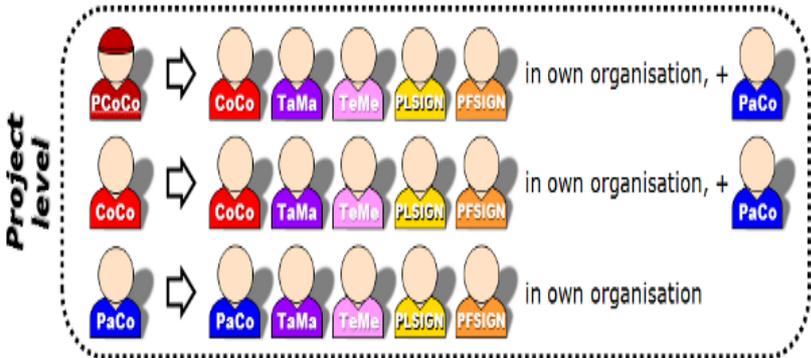
PROJECT ROLES



Depending on your project roles you can have read-only, read-write or read-write-submit rights to information, documents and forms.



Who can appoint and revoke project roles?



The Primary Coordinator Contact (PCoCo) is nominated for each project as the main contact point between the consortium and the Commission for a particular grant. By default this is the proposal initiator in the submission phase.

The PCoCo can nominate or revoke an unlimited number of Coordinator Contacts (CoCos), who will then have the same rights - except the right to revoke the PCoCo.

All Coordinator Contacts (CoCo) can:

- ✓ Nominate/revoke Participant Contacts for other organizations in the consortium
Coordinator - for this reason, it is important to give all your partner organizations access to the proposal on the Participant Portal as soon as possible.
- ✓ Nominate/revoke Task Managers and Team Members in their own organization
- ✓ Assign Legal and Financial Signatories in their organization to their projects
- ✓ Make changes to project documents on the Participant Portal
- ✓ Submit proposals and project documents to the Commission



Participant Contact (PaCo)

This is a representative of any other organization in the consortium that is not the coordinating organization. An organization can have an unlimited number of PaCos per project, and each will be able to:

- ✓ Nominate/revoke other PaCos in their organization
- ✓ Assign Legal and Financial Signatories in their organization to their projects
- ✓ Submit their work to the Coordinator
- ✓ Nominate/revoke Task Managers and Team Members in their own organization
- ✓ Make changes to project documents on the Participant Portal





Task Manager (TaMa)

TaMas can perform some restricted actions like creating, updating and uploading documents about their organization's participation, completing, modifying and deleting project information in the administrative web forms of the organization. An organization can have an unlimited number of TaMas per project. They cannot nominate or revoke anybody and submit information to the Coordinator or Commission.

Team Member (TeMe)

TeMes have limited access rights: search and read-only functions.





Summary - rights associated with roles

Project roles

PCoCo **CoCo**

- Read all forms
- Write all forms
- Submit all forms to EC

PFSIGN

- Read own forms
- Write own forms
- Submit own forms
- Sign and submit own financial forms

PLSIGN

- Read own forms
- Write own forms
- Submit own forms (except financial forms)
- Sign own legal forms

PaCo

- Read own forms
- Write own forms
- Submit own forms to coordinator (except financial forms)

Organisation roles

LEAR

- View organisation data
- Modify organisation data
- View lists of organisation's projects, proposals and organisation roles

AccAd

- View organisation data
- View lists of organisation's projects, proposals and organisation roles

TaMa

- Read own forms
- Write own forms

FSIGN

- View organisation data
- View lists of organisation's projects, proposals and organisation roles

TeMe

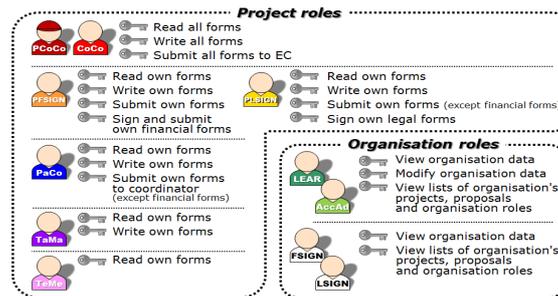
- Read own forms

LSIGN

- View organisation data
- View lists of organisation's projects, proposals and organisation roles



EXERCISE



SUBMIT A PROPOSAL



- ✓ Proposals must be submitted by the coordinator electronically using the **electronic submission system of the Participant Portal**.
- ✓ Access to the electronic submission system is available after selecting a topic and a type of action of a call.
- ✓ Proposals must be created and submitted by a representative/contact person of the coordinating organization.



(A-Z) Sitemap About this site Contact Legal notice Search English

RESEARCH & INNOVATION
Participant Portal

European Commission > Research & Innovation > Participant Portal > Calls

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COSME

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Horizon 2020 [Advanced search for topics](#)
[Calls for tenders on TED](#)

- Innovation in SMEs
- Societal Challenges
 - Health, demographic change and wellbeing
 - Food security, sustainable agriculture and forestry, marine and maritime and inland water research and the bioeconomy
 - Secure, clean and efficient energy
 - Smart, green and integrated transport
 - Climate action, environment, resource efficiency and raw materials

Status Calls with forthcoming topics Calls with open topics Calls with only closed topics

<p>Societal Challenges Horizon Prize - Birth Day H2020-BirthDayPrize-2016</p> <p>Publication date:28 April 2016</p>	<p>Societal Challenges H2020-JTI-IMI2-2016-09-two-stage H2020-JTI-IMI2-2016-09-two-stage</p> <p>Publication date:27 April 2016</p>	<p>Societal Challenges H2020-JTI-IMI2-2015-08-single-stage H2020-JTI-IMI2-2015-08-single-stage</p> <p>Publication date:18 December 2015</p>
<p>Societal Challenges Digital Security Focus Area H2020-DS-2016-2017</p> <p>Publication date:14 October 2015</p>	<p>Societal Challenges Personalised Medicine H2020-SC1-2016-2017</p> <p>Publication date:14 October 2015</p>	<p>Industrial Leadership Horizon 2020 dedicated SME Instrument 2016-2017 H2020-SMEInst-2016-2017</p> <p>Publication date:14 October 2015</p>
<p>Societal Challenges Horizon Prize - Better use of Antibiotics H2020-HOA-01-2015</p> <p>Publication date:26 February 2015</p>		

A red arrow points to the 'Personalised Medicine' call card.

Submission Service

To access the Electronic Submission Service of the topic, please select the **type of action** that is most relevant to your proposal from the list below and click on the **'Start Submission'** button. You will then be asked to confirm your choice of the type of action and topic, as these cannot be changed in the submission system. Upon confirmation you will be linked to the correct entry point.

To access existing draft proposals for this topic, please login to the Participant Portal and select the Proposals page of the My Area section.

Type of Action	Research and Innovation action [RIA]	START SUBMISSION
Topic	EU-Japan cooperation on Novel ICT Robotics based solutions for active and healthy ageing at home or in care facilities - SC1-PM-14-2016	

Guidance on proposal submission: **H2020 ONLINE MANUAL**

IT Guidance: **HOW TO**

Get support + More

H2020 Online Manual your online guide on the procedures from proposal submission to managing your grant.

https://webgate.ec.europa.eu/cas/login?domain=e... Login

Reference Documents - R... Krajowy Punkt Kontaktow... Tłumacz Google AAA PARTICIPANT PO... Google Tworzenie wiadomości - ...

EUROPEAN COMMISSION AUTHENTICATION SERVICE

EUROPA > Authentication Service > Login

ECAS authenticates your identity on European Commission websites

research require
cate

Username or e-mail address

Password

Remember my username
 Warn me each time an application asks
 View my ECAS account details after log

LOGINI!

Lost your password?
[Create an account](#) | [Help](#)

External
 Is the selected domain correct?
CHANGE IT

The electronic submission system is an online tool that guides you step-by-step through the preparation of your proposal.

The proposal consists of **2 main parts**:

✓ Administrative forms (structured information of the basic administrative data, declarations of partners, organisations and contact persons, etc.)

✓ Technical annex, which is the detailed description of the planned research and innovation project outlining work packages, costs, etc.

✓

Grants manual on proposal submission and evaluation

http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/pse/h2020-guide-pse_en.pdf



After the coordinator submits a proposal – confirmation e-mail will be sent by the EC to all the applicants.

Before the call deadline, the coordinator may replace the proposal with the new version. Only the most recent version will be evaluated.






Helpful Info

PARTICIPANT PORTAL

<http://ec.europa.eu/research/participants/portal/desktop/en/home.html>

HORIZON 2020 on-line MANUAL

<http://ec.europa.eu/research/participants/portal/desktop/en/funding/guide.html>

HORIZON 2020 DOCUMENTS

/Annotated Grant Agreement/
http://ec.europa.eu/research/participants/portal/desktop/en/funding/reference_docs.html

RESEARCH ENQUIRY SERVICE

<http://ec.europa.eu/research/index.cfm?pg=enquiries>