

Συμβουλές για την προετοιμασία του προϋπολογισμού προτάσεων στον Ορίζοντα Ευρώπη

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Νομικά θέματα



The Framework Programme for Research & Innovation





Κριτήρια αξιολόγησης

3. Quality and efficiency of the implementation

The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:

- Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall.
- Capacity and role of each participant, and the extent to which the consortium as a whole brings together the necessary expertise.

Comments:

Score 3 (0-5):

Threshold: 3/5



Proposal budget

			Estimated expenditure						Estimated income							
			Estimated eligible costs						Requested EU contribution		Revenues	Other sources of financing		Total estimated income (a)(4) + (a)(5) + (a)(6) + (a)(7)		
									EU contribution to eligible costs		Income generated by the action (a)(3)	Financial contribution (a)(6)	Own resources (a)(7)			
No	Participant name	Country	A. Personnel costs/€ (a)(1)	B. Subcontracting costs/€ (a)(2)	C. Purchase costs			D. Other cost categories (a)(4) (a)(5)	E. Indirect costs/€ (a)(8) = 25% * [(a)(1) + (a)(2) + (a)(3) + (a)(4) + (a)(5) + (a)(6) + (a)(7)]	Total eligible costs (a)(9) = (a)(1) + (a)(2) + (a)(3) + (a)(4) + (a)(5) + (a)(6) + (a)(7) + (a)(8)				Funding rate (a)(10)	Maximum EU contribution to eligible costs (a)(11) = (a)(9) * (a)(10)	Requested EU contribution to eligible costs/€ (Requested grant amount) (a)(12) (a)(13)
					C.1 Travel and subsistence/€ (a)(3)	C.2 Equipment/€ (a)(3)	C.3 Other goods, works and services /€ (a)(3)									
1	Participant 1	NL	A. Personnel Costs	B. Subcontracting	C. Purchase Costs (travel; equipment; other goods, works and services)			D. Other cost categories	E. Indirect costs		Funding rate			Income	Other sources of financing	
2	Participant 2	LB														
	Affiliated Entity	LB														
3	Participant 3	DE														
	Associated Partner	AR														
Total																



Σημαντικά για αξιολόγηση

- Προσδιορισμός πόρων σύμφωνα με τις ανάγκες της **συγκεκριμένης πρότασης** (όχι υπερ/ υπο εκτιμημένα)
- Αποκλίσεις μεταξύ εταίρων με την κατάλληλη αιτιολογία **βάσει του ρόλου τους**
- Πολύ καλή τεκμηρίωση **subcontracting**
- Συμμετοχή **3rd parties** με τον κατάλληλο τρόπο
- Επαρκές effort/ budget για **management / coordination**
- **Διαφάνεια / Σαφήνεια / Τεκμηρίωση της αναγκαιότητας / Σύνδεση με τις δράσεις του έργου**

→ Ελαχιστοποίηση αλλαγών στην υλοποίηση

A. Personnel costs

Estimated eligible costs

No	Participant name	Country	A. Personnel costs/€ (a1)	B. Subcontracting costs/€ (b)	C. Purchase costs			D. Other cost categories	E. Indirect costs/€ (e) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (h) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
					C.1 Travel and subsistence/€ (c1)	C.2 Equipm ent/€ (c2)	C.3 Other goods, works and services /€ (c3)	D.X [specific cost category] /€ (dx)		
1	Participant 1	NL								
2	Participant 2	LB								



A. Personnel costs

- Προσδιορισμός κατάλληλων εργαζομένων με βάση την ερευνητική δουλειά του **συγκεκριμένου έργου**
 - Μισθοδοτούνται από τον **beneficiary ή άλλη οντότητα**;
 - **Βαθμός/ ιεραρχία** (manager, junior – senior, technical, professor, researcher, post-doc, administrative, ...)
 - **Είδος εργασιακής σχέσης** (μισθωτοί, συμβασιούχοι έργου, τίτλοι κτήσης, SME owners, ...)
 - **Ποσοστό** απασχόλησης (full time – part time, ...)
 - Λαμβάνοντας υπόψη πιθανή **ημερομηνία έναρξης** και πιθανές αλλαγές
- Προσδιορισμός **average monthly rate (“PM rate”)** των συγκεκριμένων εργαζομένων (πλήρες εργοδοτικό κόστος), ανάλογα και με τη συνεισφορά καθενός

Proposal personnel costs = [Average monthly rate] * [number of PersonMonths]

Reported personnel costs = see previous presentation



A. Personnel costs

Table 3.1f: Summary of staff effort

Please indicate the number of person/months over the whole duration of the planned work, for each work package, for each participant. Identify the work-package leader for each WP by showing the relevant person-month figure in bold.

	WPn	WPn+1	WPn+2	Total Person-Months per Participant
Participant Number/Short Name				
Participant Number/Short Name				
Participant Number/Short Name				
Total Person Months				

B. Subcontracting

Estimated eligible costs

			A. Personnel costs/€ (a1)	B. Subcontracti ng costs/€ (b)	C. Purchase costs			D. Other cost categories	E. Indirect costs/€ (e) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (h) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
No	Participant name	Country			C.1 Travel and subsiste nce/€ (c1)	C.2 Equipm ent/€ (c2)	C.3 Other goods, works and services /€ (c3)	D.X [specific cost category] /€ (dx)		
1	Participant 1	NL								
2	Participant 2	LB								



B. Subcontracting

- Ελέγχεται **διεξοδικά**
- Μόνο για **περιορισμένο** μέρος της ερευνητικής δουλειάς
- Απαραίτητα στην πρόταση:
 - Γιατί απαιτείται;
 - Γιατί δεν μπορεί ο beneficiary να υλοποιήσει τα tasks;
 - Πώς θα διασφαλιστεί value for money/ conflict of interest;
 - Αναλυτική περιγραφή **δράσεων subcontracting και κόστους** (όχι ονομαστική αναφορά εκτός εξαιρέσεων)
- Τροποποιήσεις/ προσθήκη subcontracting: γενικά απαιτείται **έγκριση** ή/και **amendment GA**



B. Subcontracting

Table 3.1g: 'Subcontracting costs' items

For each participant describe and justify the tasks to be subcontracted (please note that core tasks of the project should not be sub-contracted).

Participant Number/Short Name		
	Cost (€)	Description of tasks and justification
Subcontracting		

C1. Travel

Estimated eligible costs

			A. Personnel costs/€ (a1)	B. Subcontracti ng costs/€ (b)	C. Purchase costs			D. Other cost categories	E. Indirect costs/€ (e) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (h) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
No	Participant name	Country			C.1 Travel and subsiste nce/€ (c1)	C.2 Equipm ent/€ (c2)	C.3 Other goods, works and services /€ (c3)	D.X [specific cost category] /€ (dx)		
1	Participant 1	NL								
2	Participant 2	LB								



C1. Travel

Μετακινήσεις για:

- Project implementation, communication and dissemination (Visits to research sites, Conferences, Infodays, Events, Exhibitions, ...)
- Project meetings between partners (General Assembly, Steering Committee, Consortium Board, Advisory Board, WP Leaders meetings, ...)
- Travels for meetings with the EC / Project review meetings
- Travels of invited speakers /external experts
- Take into account the usual practices of your organisation

C2. Equipment

Estimated eligible costs

No	Participant name	Country	A. Personnel costs/€ (a1)	B. Subcontracti ng costs/€ (b)	C. Purchase costs			D. Other cost categories D.X [specific cost category] /€ (dx)	E. Indirect costs/€ (e) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (h) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
					C.1 Travel and subsiste nce/€ (c1)	C.2 Equipm ent/€ (c2)	C.3 Other goods, works and services /€ (c3)			
1	Participant 1	NL								
2	Participant 2	LB								



C2. Equipment

- Επιλέξιμο κόστος:
 - Μόνο **απολύτως απαραίτητος** για το έργο εξοπλισμός
 - Μόνο για την αξία **αποσβέσεων**
 - Στη **διάρκεια και στο ποσοστό χρήσης** στο έργο
- Απόφαση στην πρόταση:
 - Αγορά **νέου** εξοπλισμού;
 - Αγορά **μεταχειρισμένου** εξοπλισμού;
 - Χρήση **υπάρχοντος** εξοπλισμού;
 - **Ενοικίαση/ leasing**;
- Χρόνος έναρξης σχετικών δράσεων – προγραμματισμός απαραίτητων διαδικασιών

C3. Other goods

Estimated eligible costs

No	Participant name	Country	A. Personnel costs/€ (a1)	B. Subcontracti ng costs/€ (b)	C. Purchase costs			D. Other cost categories D.X [specific cost category] /€ (dx)	E. Indirect costs/€ (e) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (h) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
					C.1 Travel and subsiste nce/€ (c1)	C.2 Equipm ent/€ (c2)	C.3 Other goods, works and services /€ (c3)			
1	Participant 1	NL								
2	Participant 2	LB								



C3. Other goods, works & services

- Οποιοσδήποτε άλλες δαπάνες απαραίτητες για την υλοποίηση
- Ερευνητικά αναλώσιμα
- Προώθηση/ διαφήμιση/ dissemination
- Διοργάνωση συναντήσεων/ εκδηλώσεων
- Προστασία IP
- Δαπάνες εμβασμάτων (από συντονιστή προς εταίρους)
- Υπηρεσίες κατασκευής/ συντήρησης website
-
- Best value for money – avoid conflict of interest
- Πιστοποιητικό δαπανών (CFS) όταν η αιτούμενη χρηματοδότηση είναι ≥ 430.000

Ό,τι προσδιορίζεται
ως “ACTION TASK”
→ **Subcontracting**



C. Purchase costs

Table 3.1h: 'Purchase costs' items (travel and subsistence, equipment and other goods, works and services)

Please complete the table below for each participant if the purchase costs (i.e. the sum of the costs for 'travel and subsistence', 'equipment', and 'other goods, works and services') exceeds 15% of the personnel costs for that participant (according to the budget table in proposal part A). The record must list cost items in order of costs and starting with the largest cost item, up to the level that the remaining costs are below 15% of personnel costs.

Participant Number/Short Name		
	Cost (€)	Justification
Travel and subsistence		
Equipment		
Other goods, works and services		
Remaining purchase costs (<15% of pers. Costs)		
Total		

D. Other cost categories

Estimated eligible costs

No	Participant name	Country	A. Personnel costs/€ (a1)	B. Subcontracting costs/€ (b)	C. Purchase costs			D. Other cost categories	E. Indirect costs/€ (d) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (h) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
					C.1 Travel and subsistence/€ (c1)	C.2 Equipment/€ (c2)	C.3 Other goods, works and services /€ (c3)	D.X [specific cost category] /€ (dx)		
1	Participant 1	NL								
2	Participant 2	LB								



Estimated project expenditure												
Estimated eligible costs												
D. Other cost categories												
No	Participant name	Country	D.1 Financial support to third parties (Actual costs) (d1)	D.2 Internally invoiced goods and services (Unit costs - usual accounting practices) (d2)	D.3 Transnational access to research infrastructures (Unit costs) (d3)	D.4 Virtual access to research infrastructures (Unit costs) (d4)	D.5 PCP/PPI procurement costs (Actual costs) (d5)	D.6 Euratom Cofund staff mobility costs (Unit costs) (d6)	D.7 ERC additional funding (Actual costs) (d7)	D.8 ERC additional funding (subcontracting, FSTP and internally invoiced goods and services) (Actual costs) (d8)		
1	Participant 1	NL										
2	Participant 2	LB										
	Affiliated Entity	LB										
3	Participant 3	DE										
	Associated Partner	AR										
Total												



D. Other cost categories

- Financial support to 3rd parties
- Internally invoiced goods & services
- Transnational / virtual access to research infrastructures
- PCP/ PPI procurement costs
- EURATOM/ COFUND staff mobility costs
- ERC additional funding

E. Indirect costs

Estimated eligible costs

No	Participant name	Country	A. Personnel costs/€ (a1)	B. Subcontracting costs/€ (b)	C. Purchase costs			D. Other cost categories D.X [specific cost category] /€ (dx)	E. Indirect costs/€ (e) = 25% * [(a1) + (c1) + (c2) + (c3) + (d7)]	Total eligible costs (f) = (a1) + (b) + (c1) + (c2) + (c3) + (d) + (e)
					C.1 Travel and subsistence/€ (c1)	C.2 Equipm ent/€ (c2)	C.3 Other goods, works and services /€ (c3)			
1	Participant 1	NL								
2	Participant 2	LB								

$$\text{Indirect costs} = 25\% * ([A] + [C] + [D.7])$$



Inkind contributions by 3rd parties

Table 3.1j: 'In-kind contributions' provided by third parties

Please complete the table below for each participants that will make use of in-kind contributions (non-financial resources made available free of charge by third parties). In kind contributions provided by third parties free of charge are declared by the participants as eligible direct costs in the corresponding cost category (e.g. personnel costs or purchase costs for equipment).

Participant Number/Short Name			
Third party name	Category	Cost (€)	Justification
	Select between Seconded personnel Travel and subsistence Equipment Other goods, works and services Internally invoiced goods and services		



Affiliated entities

3.2 Capacity of participants and consortium as a whole [e.g. 3 pages]

! The individual members of the consortium are described in a separate section under Part A. There is no need to repeat that information here.

- Describe the consortium. How does it match the project's objectives, and bring together the necessary disciplinary and inter-disciplinary knowledge. Show how this includes expertise in social sciences and humanities, open science practices, and gender aspects of R&I, as appropriate. Include in the description affiliated entities and associated partners, if any.

No	Participant name	Country	D.1 Financial support to third parties (Actual costs) (d1)	D.2 Internally invoiced goods and services (Unit costs - usual accounting practices) (d2)	D.3 Transnational access to research infrastructures (Unit costs) (d3)	D.4 Virtual access to research infrastructures (Unit costs) (d4)	D.5 PCP/PPI procurement costs (Actual costs) (d5)	D.6 Euratom Cofund staff mobility costs (Unit costs) (d6)	D.7 ERC additional funding (Actual costs) (d7)	D.8 ERC additional funding (subcontracting, FSTP and internally invoiced goods and services) (Actual costs) (d8)		
1	Participant 1	NL										
2	Participant 2	LB										
	Affiliated Entity	LB										



Estimated income						
Requested EU contribution			Revenues	Other sources of financing		Total estimated income
EU contribution to eligible costs			Income generated by the action	Financial contributions	Own resources	
Funding rate (U)	Maximum EU contribution to eligible costs (l) = (U) * (n)	Requested EU contribution to eligible costs/€ (Requested grant amount) (m) (n)		(q)	(r)	(s)=(n) + (o) + (p) + (q) + (r)



Revenues						
Requested EU contribution			Revenues	Other sources of financing		Total estimated income
EU contribution to eligible costs			Income generated by the action (o)	Financial contributions (q)	Own resources (r)	
Funding rate (U)	Maximum EU contribution to eligible costs (l) = (U) * (h)	Requested EU contribution to eligible costs/€ (Requested grant amount) (m) (n)		(s)=(n) +(o)+(p)+ (q) + (r)		
Income expected to be generated by the project						



Financial contributions

Financial contribution						
Requested EU contribution			Revenues	Other sources of financing		Total estimated income
EU contribution to eligible costs			Income generated by the action (o)	Financial contributions (q)	Own resources (r)	
Funding rate (U)	Maximum EU contribution to eligible costs (l) = (U) * (h)	Requested EU contribution to eligible costs/€ (Requested grant amount) (m) (n)				
(s)=(n) + (o)+(p)+ (q) + (r)						

contributions expected to be received / already received from other sources

Financial contributions expected to be received / already received from other sources



Own resources

Estimated income				Own resources		Total estimated income
Requested EU contribution			Revenues	Other sources of financing		
EU contribution to eligible costs			Income generated by the action (o)	Financial contributions (q)	Own resources (r)	(s)=(n) +(o)+(p)+ (q) + (r)
Funding rate (U)	Maximum EU contribution to eligible costs (l) = (U) * (h)	Requested EU contribution to eligible costs/€ (Requested grant amount) (m) (n)				
Resources of the beneficiary to be used in the project						



Useful links

↳ Funding & Tenders Opportunities Portal

↳ How to participate

↳ Reference Documents

↳ Grant agreements and contracts

HE MGA, HE Unit MGA, Lump Sum MGA

↳ Guidance

List of eligible countries, AGA - Annotated Grant Agreement

↳ Templates & forms

Application forms, Evaluation forms, Reporting templates

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