

„Euroopa horisont,, (HEU) kindlasummaline toetus

24. aprill 2025

Teemad:

- Kindlasummaline (lump sum) toetus – olulisemad reeglid taotlemisel
- Mida pidada silma projekti planeerimise ja elluviimise käigus

Esinejad:

Margit Ilves, ETAG
Teet Teinemaa, TLÜ
Laura Tomson, TÜ



Projektide rahastamise viisid

- **Lubatud kulude hüvitamine** - tegelikel kuludel põhinevad toetused
- **Kindlasummaline toetus** (*lump sum*)
- **Ühikukuludel põhinev toetus** (nt Marie Skłodowska Curie meetmed)
- **Auhinnad**

Rahastamise viisi ei saa taotleja ise valida

Waste-to-value devices - circular production of renewable fuels, chemicals and materials

HORIZON-EIC-2025-PATHFINDERCHALLENGES-01-04

Topic Call for proposal

Internal navigation

General information
Topic description
Mission
Destination
Conditions and documents
Budget overview
Partner search announcements
Start submission

General information

Programme

Horizon Europe (HORIZON)

Call

[EIC Pathfinder Challenges 2025 \(HORIZON-EIC-2025-PATHFINDERCHALLENGES-01\)](#)

Type of action

HORIZON-EIC HORIZON EIC Grants

Type of MGA

HORIZON Lump Sum Grant [HORIZON-AG-LS]

 Forthcoming

Deadline model

single-stage

Planned opening date

24 July 2025

Deadline date

29 October 2025

Topic description

Rahastamise viisi ei saa taotleja ise valida

EIC Pathfinder Open

HORIZON-EIC-2025-PATHFINDEROPEN

Topic Call for proposal

Internal navigation

General information

Topic description

Topic updates

Mission

Destination

Conditions and documents

Budget overview

Partner search announcements

General information

Programme

Horizon Europe (HORIZON)

Call

EIC Pathfinder 2025 (HORIZON-EIC-2025-PATHFINDEROPEN)

Type of action

HORIZON-EIC HORIZON EIC Grants

Type of MGA

HORIZON Action Grant Budget-Based [HORIZON-AG]

Open For Submission

Deadline model

single-stage

Opening date

20 February 2025

Deadline date

21 May 2025 17:00:00 Br

Topic description

Mida tähendab *lump sum* rahastamine?

- **Kindel summa, mis on mõeldud projekti kõikide kulude (või ühe/mitme kulukategooria) katmiseks**
- Toetuse summa võib olla juba tööprogrammis välja toodud või **lepitakse see kokku peale taotluste hindamist**
- **Toetuse määr võetakse arvesse toetuse summa arvutamisel.** Kehtivad tavapärased toetusmäärad:
 - Teadusprojektid (RIA)
 - Koordineerivad ja toetavad projektid (CSA)
 - Innovatsiooniprojektid (IA):
 - Kasumit taotlevad organisatsioonid - kuni 70%
 - Kasumit mitte taotlevad organisatsioonid - 100%

kõikidele osalejatele 100%

- Maksed tehakse vastavalt aruandlusperioodi lõpuks lõpetatud töopakettidele
- Tegelikku rahakasutust ei kontrollita, tegelikke kulusid ei raporteerita, finantsauditeid ei toimu
- Hiljem eelarvet ümber ei vaadata, nt hindade muutumise valguses

**Maksed tehakse GA
Lisa 2 alusel**

**NB! Eelarve paindlikkuse
reeglid ei kehti**

	WP1	WP2	WP3	WP4	WP5
Beneficiary A	250.000			50.000	300.000
Beneficiary B		250.000	350.000	50.000	
Beneficiary C	100.000	100.000		50.000	
Beneficiary D		120.000		50.000	
Total	350.000	470.000	350.000	200.000	300.000

↓ ✓	↓ ✗	↓ ✓	↓ ✗
-----	-----	-----	-----

Payment = 350 000 + 0 + 350 000 + 0 = 700 000 €

Ka lump sum projektides on ettemaks, üldjuhul:

- **80%**, kui on 1-2 aruandlusperioodi
- **53%**, kui on 3 aruandlusperioodi
- **40%**, kui on 4 aruandlusperioodi

Ettemaksust arvutatakse maha 5% (kogu toetuse mahust), mis läheb garantiifondi

Taotlus

- Kasutatakse **tavalist taotlusvormi** (A- ja B-osa), kus sarnaselt tavaprojektile kirjutatakse lahti
 - projekti **eesmärgid, metoodika**, eeldatavad **tulemused ja mõju**
 - planeeritavad **tegevused** töopakettide kaupa
 - **ressursitabelid**

 **Page limit:** The title, list of participants and sections 1, 2 and 3, together, should not be longer than 45 pages. For topics using lump sum funding, the limit is 50 pages. All tables, figures, references and any other element pertaining to these sections must be included as an integral part of these sections and are thus counted against this page limit. The number of pages included in each section of this template is only **indicative**.

Taotlus

Lisaks tavapärasele vormidele esitada detailne eelarve Exceli formaadis

-> Kõik vormid laadida alla F&T portaalis vastava taotlusvooru juurest

Deadline
21 September 2023 17:00:00 Brussels Local Time
38 days left until closure

Call data
Call: **HORIZON-CL2-2023-HERITAGE-ECCCH-01**
Topic: **HORIZON-CL2-2023-HERITAGE-ECCCH-01-02**
Type of action: **HORIZON-RIA**
Type of MGA: **HORIZON-AG-LS**

! Topic and type of action can only be changed by creating a new proposal.

Download Part B templates

 [Download part B templates](#)

Support & Helpdesk

[Online Manual](#) [IT How To](#)
[IT Helpdesk](#) [FAQ](#)

! Please submit your proposal at the latest **48 hours** before the proposals will not be accepted. Don't wait until the end because the deadline.
You can submit the proposal as many times as you wish

Find your organisation

PIC **i *** **Short name**

Organisations you have been previously associated with. (Click to see)

PIC: 924179238
Minu OÜ
Kase 2
Tartu, EE
VAT: 12365878

Your role

Please indicate your role in this proposal *

Main contact
 Contact person

Taotlus – tööpakettide koostamine

Tegevuste tööpakettidesse jaotamisel võib olla mõistlik **arvestada aruandlusperioodidega**, aga

- Igale **üksikule tegevusele** ei saa teha eraldi tööpaketti
- Püüda siiski lähtuda **tegevuste sisulisest loogikast** – ajaline jaotamine üldjuhul ei sobi
- Tööpakettide hulk võib olla mõnevõrra suurem

Arvestada projekti tegevuste dokumenteerimise nõuetega

Dokumenteerimise nõuded

Andmete säilitamine, MGA art 20

- Projekti **korrektset ja nõuetele vastavat elluviimist** (sh kes mida tegi) ning **teiste GA nõuete täitmist** tõestavaid dokumente tuleb säilitada **viis aastat** peale lõppmakse tegemist
- Projekti **otseseid kulusid tõendavaid dokumente ei ole vaja luua ega säilitada**. See ei puuduta asutusesiseseid reegleid – neid tuleb ikka järgida
 - **Siiski tuleb olla valmis esitama üldisi raamatupidamise dokumente**

FAQ: ...to prove the proper scientific and technical implementation of the action, as detailed in Annex 1 (e.g. for research activities, documentation required by good research practices **such as lab books, technical documents, prototypes, publications, proceedings in conferences, etc.**) The scientific and technical documentation required for lump sum grants is the same as for all grants (i.e. there are no additional technical documents to be kept specifically for lump sum grants).

Dokumenteerimise nõuded, LS MGA

ARTICLE 20 — RECORD-KEEPING

20.1 Keeping records and supporting documents

The beneficiaries must — at least until the time-limit set out in the Data Sheet (see Point 6) — keep records and other supporting documents to prove the proper implementation of the action (proper implementation of the work and/or achievement of the results as described in Annex 1) in line with the accepted standards in the respective field (if any); beneficiaries do not need to keep specific records on the actual costs incurred.

The records and supporting documents must be made available upon request (see Article 19) or in the context of checks, reviews, audits or investigations (see Article 25).

Dokumenteerimise nõuded, EK juhend „How to manage your lump sum grants“

8. Record keeping

You have no contractual obligation to keep financial records for the project. There is no reporting of actual costs or of resources. You will only need to comply with record keeping and other legal obligations outside the lump sum grant agreement, if any (*e.g. under national law or internal procedures*).

You must keep documentation to demonstrate that the activities in Annex 1 have been carried out, and by whom. This is the same technical documentation as for all grants (i.e. there is no additional technical documentation to be kept specifically for lump sum grants). For example, for research activities, you should keep documentation as required by good research practices such as lab books, technical documents, prototypes, proceedings in conferences, and publications.

Taotlus

Läbi terve projekti jooksvaid töopakette on lubatud jaotada osadeks – vastavalt aruandlusperioodide arvule

- Kogu **sisuosa kirjeldust ei ole vaja kopeerida**, piisab viitest
- Välja tuua tegevused, millega on seotud **täiendavad kulud**, nt üritused

Taotlus – eelarvet käsitletakse kõikides taotluse osades

Administrative forms

Proposal ID **SEP-211150938**

Acronym **dtj**

A-osa

3 - Budget



No	Name of Beneficiary	Country	Role	Requested grant amount	Income generated by the action	Financial contributions	Own resources	Total estimated income
1	Minu Oü	EE	Coordinator					
Total								0.00

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		

B-osa

Table 3.1g: 'Subcontracting costs' items

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

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

BENEFICIARY 1 - CALCULATION SHEET

COST CATEGORY	
COSTS WORK PACKAGE 1: WP1 name	
A. DIRECT PERSONNEL COSTS	
A.1 Employees (or equivalent)	
SENIOR SCIENTISTS (or equivalent in the private sector)	
JUNIOR SCIENTISTS (or equivalent in the private sector)	
TECHNICAL PERSONNEL (or equivalent in the private sector)	
ADMINISTRATIVE PERSONNEL (or equivalent in the private sector)	
OTHERS	
A.2 Natural Persons under direct contract	
A.3 Seconded Persons	
A.4 SME owners and natural person beneficiaries	
B. DIRECT SUBCONTRACTING COSTS	

Detailne Excel

Eelarve

Hindajad võivad teha konkreetseid eelarve muutmise ettepanekuid,
nt siis, kui eelarve sisaldab **abikõlbmatuid ja/või ülepaisutatud**
kulusid

Selgelt üle- või alahinnatud kuluproгноoside puhul **vähendatakse**
***implementation* kriteeriumi hinnet**

Detailne eelarve ([etteantud Excel formaadis](#)):

- Sisaldab hinnangulisi kulusid kulukategooriate lõikes jagatuna töopakettide ja partnerite vahel
- Kõik eelarvesse planeeritavad kulud peavad vastama **tavapärastele HEU abikõlblikkuse tingimustele**

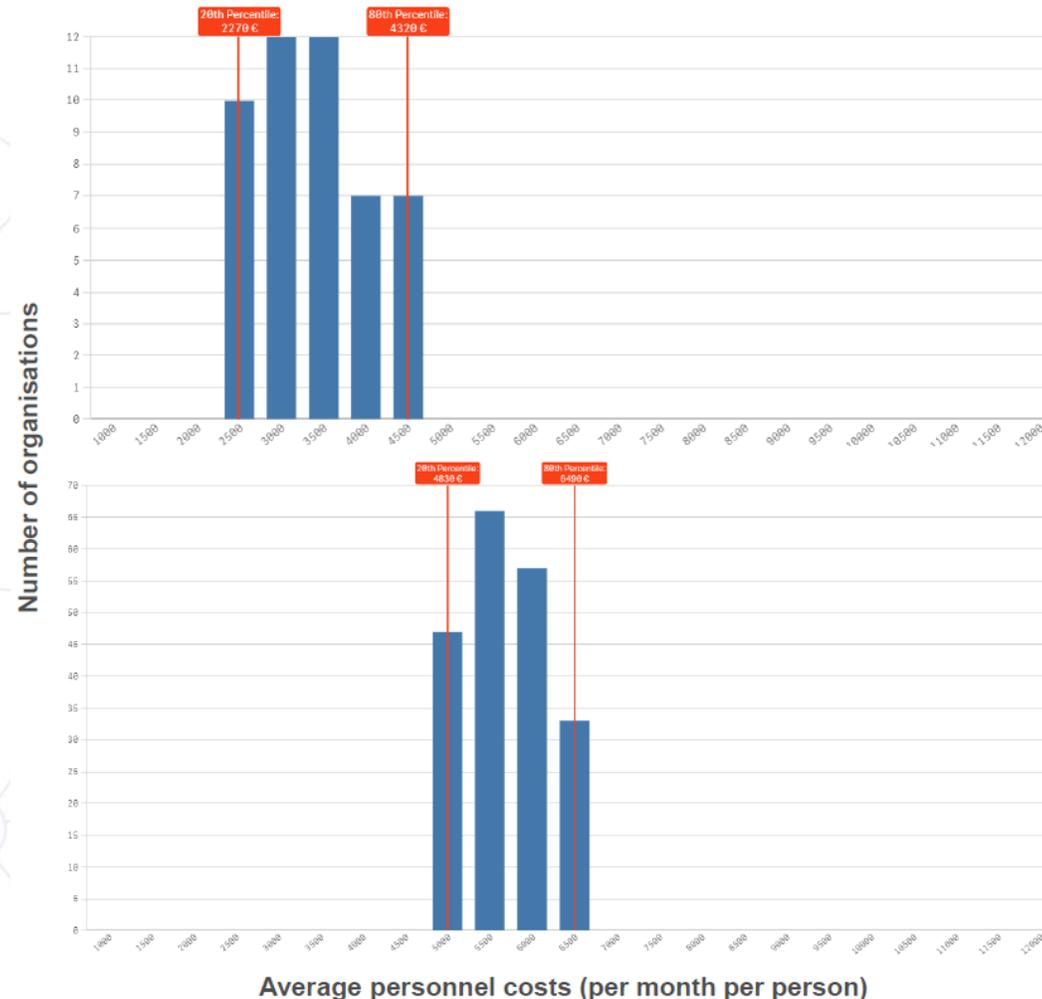
10) *[Additional option for LUMP SUM Grants:* For Lump Sum Grants with a detailed budget table: We understand and accept that the EU lump sum grants must be reliable proxies for the actual costs of a project and confirm that the detailed budget for the proposal has been established in accordance with our usual cost accounting practices and in compliance with the basic eligibility conditions for EU actual cost grants (see [AGA — Annotated Grant Agreement, art 6](#)) and exclude costs that are ineligible under the Programme. Purchases and subcontracting costs must be done taking into

Abikõlblikud kulud

A. Personalikulud – eelarves töökuu hind tötajagruppide kaupa; tavapärane palgatase

Horizon dashboard for lump sum evaluations

- Aitab ekspertidel hinnata, kas personalikulud on üle- või alaplaneeritud
- Andmed on võetud **senistest** projektide aruannetest
- Olulisi erinevusi on mõttekas põhjendada taotluse sisuosas ja Exceli **'Any comments'** osas



Personnel costs for Research Organisations in Romania

Personnel costs for Research Organisations in Germany

Abikõlblikud kulud

B. Allhange – projekti **sisutegevuse sisseostmine** (*action task*), nt prototüüp, uuring, analüüs

C. Ostukulud

C.1 **Reisikulud** - reis, majutus, päevaraha

C.2 **Seadmed** – reeglina amortisatsioonikulu – arvutamiseks eraldi leht Excelis

C.3 **Muud kaubad, tööd ja teenused** – nt tulemite kaitsmine, tulemite levitamine, tõlketööd, publikatsioonid, ~~CFS (kui toetus \geq 430 000€)~~

D. Muud kulukategooriad

D.1 *Financial support to third parties* (konsortsiumi jagatavad grantid, auhinnad vmt)

D.2 **Sisekäibearved** – kaubad-teenused, mida partnerasutus ise toodab või pakub

E. Kaudsed kulud – 25% otsestest kuludest, v.a. allhange; D.1; D.2



Generate the Excel file in macro-free format
Ready for the online submission system

Instructions

Go to Beneficiaries and Affiliated Entities list

! Double click buttons !

Go to Work packages list

GENERAL INSTRUCTIONS

Comprehensive guidance and background on [lump sum funding under Horizon Europe](#) is available on the Funding & Tenders Portal. To get started, we recommend to read the guide [Lump sum funding – what do I need to know](#). This includes details on how to complete this Excel workbook. The weblinks are provided in column E.

We recommend using Excel 2013 (Windows) / Excel 2016 (Mac OS) or more recent.

The only currency used in this workbook is EURO (€).

You **must complete** the following sheets: 'BE list' – 'WP list' – 'BEx' (one sheet for each beneficiary) – 'Depreciation costs' (if any). The appropriate number of individual beneficiary sheets ('BEx') will be generated automatically with data from the 'BE list' and 'WP list' sheets.

The information in this workbook **must correspond** to the main proposal. For example, the list of beneficiaries and the list of work packages must be the same. Likewise, the tables in section 3.1 of Part B of the proposal must be in line with this workbook (e.g., table 3.1h 'purchase costs', and table 3.1i 'internally invoiced goods and services').

[Lump sum funding - what do I need to know](#)

BE LIST

In the 'BE list', you can add as many beneficiaries and as many affiliated entities as you need. To add beneficiaries, click on the "Add BE" button. To add an affiliated entity, click on the "Add AE" button next to the beneficiary concerned.

For each beneficiary and each affiliated entity, you must select the country and the appropriate funding rate in the drop-down menus. The funding rates are used in the automatic calculation of the lump sum breakdown. For RIA and CSA topics, the funding rate is always 100%. For IA topics, the funding rate is 70% (except for non-profit legal entities, where a rate of up to 100% applies). For more information on the funding rate, please refer to your topic description.

Once you have completed the 'BE list' sheet, click the "Apply changes" button to generate the corresponding sheets in the Excel workbook.

To delete a beneficiary from the 'BE list', click the "Clear BE" button next to it. Likewise, to delete an affiliated entity, click the "Clear AE" button next to it. The first beneficiary BE1 cannot be deleted, but its details can be modified. Click "Apply changes" to delete the corresponding sheets from the workbook. Deleted beneficiary sheets then appear as a backup and are excluded from the calculation. Data of deleted affiliated entities are not saved as a backup.

WP LIST

In the 'WP list', you can add as many work packages as you need. To add work packages, click the "Add WP" button. Once you have completed the 'WP list' sheet, click the "Apply changes" button.

Instructions

BE list

WP list

Lump sum breakdown

Person-months overview

Summary per WP

BE1

BE2

BE3

Depreciation costs

Any comments

+

List of beneficiaries and affiliated entities

BE/AE nr	BE/AE name	Acronym	Country	Funding rate
BE1	EE asutus	EEA	EE	100%
BE1-AE1	EE asutuse sidusorg.	EEA SI	EE	100%
BE2	IT asutus	ITA	IT	100%
BE3	FI asutus	FIA	FI	100%

Add BE

! Double click buttons !

Apply changes

Clear BE1-AE1

Add AE to BE1

Clear BE2

Add AE to BE2

Clear BE3

Add AE to BE3



Horizon Europe Programme

Detailed lump sum budget

Generate the Excel file in macro-free format
Ready for the online submission system

Instructions

Go to Beneficiaries and Affiliated Entities list

! Double click buttons !

Go to Work packages list

GENERAL INSTRUCTIONS

Comprehensive guidance and background on [lump sum funding under Horizon Europe](#) is available on the Funding & Tenders Portal. To get started, we recommend to read the guide [Lump sum funding – what do I need to know](#). This includes details on how to complete this Excel workbook. The weblinks are provided in column E.

We recommend using Excel 2013 (Windows) / Excel 2016 (Mac OS) or more recent.

The only currency used in this workbook is EURO (€).

You **must complete** the following sheets: ‘BE list’ – ‘WP list’ – ‘BEx’ (one sheet for each beneficiary) – ‘Depreciation costs’ (if any). The appropriate number of individual beneficiary sheets (‘BEx’) will be generated automatically with data from the ‘BE list’ and ‘WP list’ sheets.

The information in this workbook **must correspond** to the main proposal. For example, the list of beneficiaries and the list of work packages must be the same. Likewise, the tables in section 3.1 of Part B of the proposal must be in line with this workbook (e.g., table 3.1h ‘purchase costs’, and table 3.1i ‘internally invoiced goods and services’).

[Lump sum funding - what do I need to know](#)

BE LIST

In the ‘BE list’, you can add as many beneficiaries and as many affiliated entities as you need. To add beneficiaries, click on the “Add BE” button. To add an affiliated entity, click on the “Add AE” button next to the beneficiary concerned.

For each beneficiary and each affiliated entity, you must select the country and the appropriate funding rate in the drop-down menus. The funding rates are used in the automatic calculation of the lump sum breakdown. For RIA and CSA topics, the funding rate is always 100%. For IA topics, the funding rate is 70% (except for non-profit legal entities, where a rate of up to 100% applies). For more information on the funding rate, please refer to your topic description.

Once you have completed the ‘BE list’ sheet, click the “Apply changes” button to generate the corresponding sheets in the Excel workbook.

To delete a beneficiary from the ‘BE list’, click the “Clear BE” button next to it. Likewise, to delete an affiliated entity, click the “Clear AE” button next to it. The first beneficiary BE1 cannot be deleted, but its details can be modified. Click “Apply changes” to delete the corresponding sheets from the workbook. Deleted beneficiary sheets then appear as a backup and are excluded from the calculation. Data of deleted affiliated entities are not saved as a backup.

WP LIST

In the ‘WP list’, you can add as many work packages as you need. To add work packages, click the “Add WP” button. Once you have completed the ‘WP list’ sheet, click the “Apply changes” button.



BENEFICIARY 1 - CALCULATION SHEET

View Summary

Affiliated Entity 1

EE asutus

EE asutuse sidusorg.

COST CATEGORY	EE asutus			EE asutuse sidusorg.			BE+AE TOTAL COSTS
	UNITS	COST PER UNIT	AE TOTAL COSTS	UNITS	COST PER UNIT	AE TOTAL COSTS	
COSTS WORK PACKAGE 1: WP1 name							
A. DIRECT PERSONNEL COSTS							
A.1 Employees (or equivalent)							
SENIOR SCIENTISTS (or equivalent in the private sector)			0,00			0,00	0,00
JUNIOR SCIENTISTS (or equivalent in the private sector)							
TECHNICAL PERSONNEL (or equivalent in the private sector)							
ADMINISTRATIVE PERSONNEL (or equivalent in the private sector)							
OTHERS							
A.2 Natural Persons under direct contract							
A.3 Seconded Persons							
A.4 SME owners and natural person beneficiaries							
B. DIRECT SUBCONTRACTING COSTS							
C. DIRECT PURCHASE COSTS							
C.1 Travel and subsistence							
C.2 Equipment (complete 'Depreciation costs' sheet)							
Equipment							
Infrastructure							
Other assets							
C.3 Other goods, works and services							
Consumables							
Services for meetings, seminars			0,00			0,00	0,00
Services for dissemination activities (including website)			0,00			0,00	0,00
Publication fees			0,00			0,00	0,00
Other (shipment, insurance, translation, etc.)			0,00			0,00	0,00
D. OTHER COST CATEGORIES							
D.1 Financial support to third parties (if applicable in the topic specific conditions)							
D.1 Internally invoiced goods and services			0,00			0,00	0,00
D.2 Transnational access to research infrastructure unit costs (if mentioned as eligible in the topic specific conditions)			0,00			0,00	0,00
D.3 Virtual access to research infrastructure unit costs (if mentioned as eligible in the topic specific conditions)			0,00			0,00	0,00
D.4 PCP/PPI procurement costs (if mentioned as eligible in the topic specific conditions)			0,00			0,00	0,00
TOTAL DIRECT PERSONNEL COSTS AND PURCHASE COSTS (A+C)							
TOTAL DIRECT COSTS (A+B+C+D)							
E. INDIRECT COSTS (25% * (A+C))							
F. TOTAL COSTS (A+B+C+D+E)							

Mis on ühik?

- Üks töökuu
- Ühe inimese üks reis
- Üks allhangitav töö
- Üks seade, mida projektis kasutatakse
- Üks projektiüritus
- Üks publikatsioon

COSTS WORK PACKAGE 2: WP2 name

A. DIRECT PERSONNEL COSTS							
A.1 Employees (or equivalent)							
SENIOR SCIENTISTS (or equivalent in the private sector)			0,00			0,00	0,00
JUNIOR SCIENTISTS (or equivalent in the private sector)			0,00			0,00	0,00
TECHNICAL PERSONNEL (or equivalent in the private sector)			0,00			0,00	0,00
ADMINISTRATIVE PERSONNEL (or equivalent in the private sector)			0,00			0,00	0,00
OTHERS			0,00			0,00	0,00
A.2 Natural Persons under direct contract							
A.3 Seconded Persons							



Horizon Europe Programme

Detailed lump sum budget

Generate the Excel file in macro-free format
Ready for the online submission system

Instructions

Go to Beneficiaries and Affiliated Entities list

! Double click buttons !

Go to Work packages list

GENERAL INSTRUCTIONS

Comprehensive guidance and background on [lump sum funding under Horizon Europe](#) is available on the Funding & Tenders Portal. To get started, we recommend to read the guide [Lump sum funding – what do I need to know](#). This includes details on how to complete this Excel workbook. The weblinks are provided in column E.

We recommend using Excel 2013 (Windows) / Excel 2016 (Mac OS) or more recent.

The only currency used in this workbook is EURO (€).

You **must complete** the following sheets: ‘BE list’ – ‘WP list’ – ‘BEx’ (one sheet for each beneficiary) – ‘Depreciation costs’ (if any). The appropriate number of individual beneficiary sheets (‘BEx’) will be generated automatically with data from the ‘BE list’ and ‘WP list’ sheets.

The information in this workbook **must correspond** to the main proposal. For example, the list of beneficiaries and the list of work packages must be the same. Likewise, the tables in section 3.1 of Part B of the proposal must be in line with this workbook (e.g., table 3.1h ‘purchase costs’, and table 3.1i ‘internally invoiced goods and services’).

[Lump sum funding - what do I need to know](#)

BE LIST

In the ‘BE list’, you can add as many beneficiaries and as many affiliated entities as you need. To add beneficiaries, click on the “Add BE” button. To add an affiliated entity, click on the “Add AE” button next to the beneficiary concerned.

For each beneficiary and each affiliated entity, you must select the country and the appropriate funding rate in the drop-down menus. The funding rates are used in the automatic calculation of the lump sum breakdown. For RIA and CSA topics, the funding rate is always 100%. For IA topics, the funding rate is 70% (except for non-profit legal entities, where a rate of up to 100% applies). For more information on the funding rate, please refer to your topic description.

Once you have completed the ‘BE list’ sheet, click the “Apply changes” button to generate the corresponding sheets in the Excel workbook.

To delete a beneficiary from the ‘BE list’, click the “Clear BE” button next to it. Likewise, to delete an affiliated entity, click the “Clear AE” button next to it. The first beneficiary BE1 cannot be deleted, but its details can be modified. Click “Apply changes” to delete the corresponding sheets from the workbook. Deleted beneficiary sheets then appear as a backup and are excluded from the calculation. Data of deleted affiliated entities are not saved as a backup.

WP LIST

In the ‘WP list’, you can add as many work packages as you need. To add work packages, click the “Add WP” button. Once you have completed the ‘WP list’ sheet, click the “Apply changes” button.



Instructions

BE list

WP list

Lump sum breakdown

Person-months overview

Summary per WP

BE1

BE2

BE3

Depreciation costs

Any comments

+



Horizon Europe Programme

Detailed lump sum budget

Generate the Excel file in macro-free format
Ready for the online submission system

Instructions

Go to Beneficiaries and Affiliated Entities list

! Double click buttons !

Go to Work packages list

GENERAL INSTRUCTIONS

Comprehensive guidance and background on [lump sum funding under Horizon Europe](#) is available on the Funding & Tenders Portal. To get started, we recommend to read the guide [Lump sum funding – what do I need to know](#). This includes details on how to complete this Excel workbook. The weblinks are provided in column E.

We recommend using Excel 2013 (Windows) / Excel 2016 (Mac OS) or more recent.

The only currency used in this workbook is EURO (€).

You **must complete** the following sheets: ‘BE list’ – ‘WP list’ – ‘BEx’ (one sheet for each beneficiary) – ‘Depreciation costs’ (if any). The appropriate number of individual beneficiary sheets (‘BEx’) will be generated automatically with data from the ‘BE list’ and ‘WP list’ sheets.

The information in this workbook **must correspond** to the main proposal. For example, the list of beneficiaries and the list of work packages must be the same. Likewise, the tables in section 3.1 of Part B of the proposal must be in line with this workbook (e.g., table 3.1h ‘purchase costs’, and table 3.1i ‘internally invoiced goods and services’).

[Lump sum funding - what do I need to know](#)

BE LIST

In the ‘BE list’, you can add as many beneficiaries and as many affiliated entities as you need. To add beneficiaries, click on the “Add BE” button. To add an affiliated entity, click on the “Add AE” button next to the beneficiary concerned.

For each beneficiary and each affiliated entity, you must select the country and the appropriate funding rate in the drop-down menus. The funding rate used in the automatic calculation of the lump sum breakdown. For RIA and CSA topics, the funding rate is always 100%. For IA topics, the funding rate (except for non-profit legal entities, where a rate of up to 100% applies). For more information on the funding rate, please refer to your topic description.

Once you have completed the ‘BE list’ sheet, click the “Apply changes” button to generate the corresponding sheets in the Excel workbook.

To delete a beneficiary from the ‘BE list’, click the “Clear BE” button next to it. Likewise, to delete an affiliated entity, click the “Clear AE” button next to it. The first beneficiary BE1 cannot be deleted, but its details can be modified. Click “Apply changes” to delete the corresponding sheets from the workbook. Deleted beneficiary sheets then appear as a backup and are excluded from the calculation. Data of deleted affiliated entities are not saved as a backup.

Täpsustused ja kommentaarid kavandatud kulude kohta, nt põhjendused kõrgemate palgakulude kohta
Seda lehte ei pea täitma, kui ei tundu asjakohane ja vajalik

WP LIST

In the ‘WP list’, you can add as many work packages as you need. To add work packages, click the “Add WP” button. Once you have completed the ‘WP list’ sheet, click the “Apply changes” button.



Tähelepanekuid ja mõtlemisainet – taotluse ettevalmistamine

- **Konsortsiumi suurus ja struktuur**
- **Keda ja kui palju osapooli** üksikutesse töopakettidesse kaasata
- **Töopakettide arvu** planeerides mõelda edasisele **projekti haldamisele** – palju töopaketi juhte, kes kõik mh ka *review meeting*utel osalevad. Nt 20 töopaketti võib olla koormav
- Projekti **tehnilise-teadusliku planeerimise** käigus olla **selgesõnaline eesmärkide sõnastamisel ja kirjeldamisel, kuidas sinna jõutakse (tegevused)**, et projekti käigus oleks lihtsam demonstreerida lubatu elluviimist. Rahastatakse tegevusi, mitte tulemusi
- **Millise profiiliga inimesed** tegelikult projektitööd tegema hakkavad
- **Eelarve on ligikaudne hinnang** – ei eeldata väga detailset arvutust, aga **kulude abikõlblikkuse reeglid** tasub siiski meelde tuletada
- Planeerige taotluse koostamiseks 6–8 kuud

Soovitused seoses sagedasemate tabeli täitmisega seotud eksimustega

- Kasutage vormi, mille saate alla laadida taotlusvooru **taotluste esitamise keskkonnas**:
 - Ärge kasutage F&T portaali „*Reference documents*“ osast võetud vormi
 - Ärge esitage enda koostatud vormi
- **Ärge muutke vormi**:
 - Ärge lisage täiendavaid lehti – neid ei võeta arvesse
 - Kasutage „Any comments“ lehte, et lisada kommentaare või täpsustusi
- Ärge unustage täita leht „**Depreciation costs**“, kui teil on **kulusid seadmetele**
- Olge valmis, et eelarve kokkuleppimine **võtab rohkem aega**
- Kaaluge eraldi tabeli koostamist, et **midagi olulist eelarvest välja ei jääks**

Rohkem infot

- [Lump Sum MGA](#) - mudelleping
 - Kommenteeritud mudelleping ([AGA](#))

Juhendid:

- [What do I need to know & Quick guide](#)
- [Detailed guidance for applicants and beneficiaries](#)
- [Frequently asked questions](#)
- [Lump sum briefing slides for experts](#)
- EK veebinaaride salvestused ja slaidid leiab [siit](#)
- [Reporting process — Lump sum](#)