



Breakout Session: Financial Management and Reporting in Horizon 2020



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Building Bi-regional Partnerships for Global Challenges



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Financial Management in H2020

- Simpler funding rules
 - Reimbursement of direct costs
 - Personnel costs in accordance with beneficiaries' usual cost accounting practices
 - Indirect costs covered by a single flat-rate applied to the direct costs
- Funding practices in H2020
 - Financial requirements outlined in the grant agreement
 - Model annotated grant agreement:
http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf#page=170
 - Payments made: pre-financing, one or several interim payments, payment of the balance
 - Payments are made to the to **Coordinator**, who is responsible for distribution to partners
 - Reporting and payment in Euros

Participation in Horizon 2020

What can I apply for?

Research and Innovation Actions		Innovation Actions	
Funding for projects tackling clearly defined challenges, which can lead to the development of new knowledge or a new technology.		Funding focused on closer-to-the-market activities.	
Who?	Minimum 3 independent legal entities from 3 different EU MS or AC <ul style="list-style-type: none"> Additional information may be defined in the Work Programme 	Who?	Minimum 3 independent legal entities from 3 different EU MS or AC <ul style="list-style-type: none"> Additional information may be defined in the Work Programme
Funding Rate	100% funding for all activities and participants	Funding Rate	70% funding for all activities and most participants <ul style="list-style-type: none"> 100% reimbursement possible for non-profit organizations
Overhead Rate	25%	Overhead Rate	25%

Participation in Horizon 2020

What can I apply for?

Coordination and Support Actions		Marie Skłodowska-Curie Actions	
Funding covers the coordination and networking of research and innovation projects, programmes, and policies. <i>Funding for research and innovation per se is not eligible.</i>		Funding for international research fellowships in the public or private sector, research, training, staff exchanges	
Who?	Single entities or consortia of partners from different countries, industry, and academia <ul style="list-style-type: none"> Additional information may be defined in the Work Programme 	Who?	Early stage researchers or experienced researchers (of any nationality), technical staff, national/regional research mobility programmes <ul style="list-style-type: none"> Additional information may be defined in the Work Programme
Funding Rate	100% funding for all activities and participants	Funding Rate	100% funding for all activities and most participants
Overhead Rate	25%		25%

Reporting in H2020

- Periodic reports
 - Both **financial** and **technical** (i.e. reporting about activities)
 - Indirect costs covered by a single flat-rate applied to the direct costs
 - Interim payments may be delayed if there are problems with the periodic reports
 - More information on periodic reports:
http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/reports/periodic-reports_en.htm
- Final Report
 - Final periodic report plus final report (of entire project)
 - Both **financial** and **technical** (i.e. reporting about activities)
 - Due at the end of the project
 - Final reimbursement of remaining grant after the final report has been submitted and approved
- All reporting done in the Participant Portal

Group Work

Scenario 1

You are approached by a researcher who has been asked to take part in a consortium but isn't sure how to calculate their personnel costs.

- What do you do?
- What do you do if you don't know the answer?
- What do you advise the researcher?

Scenario 2

You are organizing an Info Day about the 2018-2020 Work Programme.

- What do researchers need to know about financial and management issues in Horizon 2020?
- What do you present to the participants in your Info Day?

Thank you



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Author(s): Can run onto two lines at a maximum.

Organisation Name(s): Can run onto two lines at a maximum

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