

ICER - Pro

EU Applications: Technical Process & Institutional Requirements

Co-funded by the European Union

ENCARE - Enhancing Capacities of UAS staff for more successful EU funded Research
Project Number: 2023-1-DE01-KA220-HED-000153936

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- Don’t assume consistency – read the latest call documents
- Partnership and eligibility rules
- Roles of Participation
- Institutional process and authorization
- Budget model(s) & reporting systems
- Other restrictions / rules

Learning outcomes

- Participants understand the overall technical process, general restrictions and possibilities of the funding instruments.
- Participants know how to check and prepare for those rules in early stage of the application process.
- Participants understand how to identify and follow their own institution’s internal procedures, roles and authorization requirements when preparing an application.

Follow your heart and plan your dream project.

Do this wisely by doing the reality check before you start the process.

Ask. Read. Talk to your peers.

Don’t assume consistency – always read the latest call documents

EU funding priorities can shift from one call to another. Make sure to check the latest updates

- **Horizontal priorities** (EU level political priorities) for example, emphasis on sustainability, digitalization, or inclusion may shift.
- **Overarching strands** (strategic focus areas) can slightly evolve during the programme period.
- **Call-specific priorities –** themes unique to a particular call (e.g. implementation areas) may change.

Partnership and eligibility rules

- For example: *Proposals must be submitted by a consortium of at least 5 beneficiaries from 5 different eligible countries.*

- Eligible organizations e.g.: universities, research institutions, companies (including Small and Medium-sized Enterprises SMEs), public authorities, non-governmental organization (NGOs)

- Call specific: Type of applicants targeted

Partnership and eligibility rules

- Geographical coverage, in general, a consortium should not be overly concentrated in a single country
- Newcomers & experienced project participants
- Size of the consortium depends on the project idea
- Some programmes require multi-actor approaches e.g. not only universities and/or NGOs.

Roles of participation

- **Lead Partner (LP) / Coordinator (COO):** Leads the consortium and receives funding
- **Partner / Beneficiary (BEN):** Part of the consortium and receives funding
- **Associated partner/organization (AP):** Can contribute but do not have an own budget.
- **Affiliate partner:** Carrys out tasks under the responsibility of a beneficiary
- **Stakeholder:** Can influence a project or are affected by its outcomes

Roles of participation

- **Target Group:** Individuals or organization to which the project's activities and results are primarily directed
- **End-user:** The individual or organization that ultimately uses or benefits from the project's outputs and results
- **Third-Country Participants:** Allowed if the specific call conditions permit; they usually do not count toward the minimum consortium requirement.

Work Package (WP) restrictions – is there any?

Number of WPs

- Some of the funders define in call how many WPs you should have at least and in maximum (e.g. only 3 WPs / from three to five WPs)
- Depends on the size of your project

Tasks / Activities

- Under the WP's are tasks / activities
- Number of tasks depends on the size of your project

Work Package (WP) restrictions – is there any?

Mandatory WPs

- In general, there is at least one mandatory WP call "Project Management and administration".

Example structure:

- WP1 Project Management and administration
- WP2-4 defined by project needs
- WP5 Dissemination & communication

More about WPs and activities in session Work Plan

Budget model(s)

In the call, funder express what kind of budget model they prefer

- **Lump Sum model:** Institutions will receive fix amount to implement the entire project (usually divided by WPs). e.g. 80 % of budget will be paid when the project begin, 10 % after interim report has approved, 10 % after final report has approved)
- **Simplified cost system**: personnel costs + others (covering from **flat rate** e.g. 40% from personnel costs)

Budget model(s)

- **Unit Costs system:** Institutions will receive a specific amount per budget item (e.g., €150/day).
- **Real / Actual Costs system**: Institutions will be financed according to the actual money spent e.g. personnel cost + flat rate (e.g. admin costs) + travel and subsistence + other services + equipment + investment).

Reporting systems

Reporting model depends on funder and budget model

- Continuous reporting (after every deliverable) + final report
- Reimbursement principle (reporting timeline is defined by funder, e.g. every 6M or 12 months)
- Interim report+ final report
- Budgeting and reporting are done in the funder's own reporting system (e.g Sygma, Bamos+)

Institutional process and authorization

Clarify who approves participation and who signs the application/agreement/declaration on behalf of the organization. Typically, an individual cannot independently apply for or initiate a project. Clarify your organization's application process well in advance**.**

- **Legal representative (LEAR)**: Who in your organization holds signing authority (one or more individuals)?
- Check whether your organization has **designated signing days.**

Institutional process and authorization

- **Internal approval process:** Outline the steps required before submission (e.g., management approval, budget validation, legal review).
- **Deadlines:** Emphasize starting early to meet both internal and EU deadlines
- **Compliance and eligibility**: Ensure the project aligns with organizational strategy and EU eligibility criteria.

Other restrictions / rules – check also!

- Many funders place **restrictions on the number of applications** that one organisation may submit. Remember to check this and inform your partners.(e.g. in Creative Europe CULT-3 calls, an organisation may submit only one application as a lead partner, three in total)
- Check if the funder has defined **a maximum length** for the project application (e.g Part B 50 pages).

Other restrictions / rules – check also!

- Some calls use **a two-step application process** (e.g. Project Idea Form – PIF).
- Technical or procedural details for a specific call are usually introduced in **the funder's online info sessions** soon after the call opens – it is highly recommended to attend these!

All checked?

You are ready to continue to Work Plan!

Thank You!

Heidi Tuominen & Emma Uotinen

Turku University of Applied Sciences

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ICER - Pro

Please check the following tools for further information:
CARPE Website
(general project information & training material)

LinkedIn
(news & up-dates)

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