Happy ☺ Budget Planning for Research Projects

ICER - Pro

Training Session Practical Exercise

Exercise Scenario: Terraforming Project Budget Planning

Context (for Participants):

You are part of a consortium applying for an EU-funded Horizon Europe project titled **"Terraforming"**, focused on enhancing the pedagogical and methodological approaches in advanced terraforming education across the Solar System by developing two new interplanetary intensive courses including open-access learning materials.

The project is structured into 5 Work Packages (WPs), and your organization (which is Jupiter Industry from Finland) is leading **WP3: Developing and Piloting**.

The consortium is composed by 5 entities, two of them are Higher Education Institutions (HEI) from Portugal and Germany, two Small / Medium Enterprises (SME) from Finland and Spain, and 1 Non-governmental organization (NGO) from the Netherlands. The coordinator of the project is Portugal.

This project has 5 work packages, each one led by one of the beneficiaries. Portugal leads WP1-Project Management, Germany leads WP2-Synergy Framework, Finland leads WP3-Developing and Piloting, Spain leads WP4-Training SME staff and VET students, and the Netherlands leads WP5-Dissemination & Impact.

First Task:

You must fill in the excel template (**EXCEL FILE 1**) with the beneficiaries (BE). (slide 13)

List of beneficiaries (BE) and affiliated entities (AE)					
BE/AE nr	*Role*	*BE/AE name*	*Acronym*	*Country*	*Funding rate*
BE1	Coordinator	University of Mars	HEI 1	Portugal (PT)	100%
BE2	Beneficiary	Tellus UAS	HEI 2	Germany (DE)	100%
BE3	Beneficiary	Pluto Training Ltd.	SME 1	Spain (ES)	70%
BE4	Beneficiary	Jupiter Industry	SME 2	Finland (FI)	70%
BE5	Beneficiary	Make a Wish Shooting Stars for All	NGO 1	Netherlands (NL)	100%

You should also fill in the names of the work packages (WP). (slide 14)

List of Work Packages	
WP number	*WP name*
WP1	Project Management
WP2	Synergy Framework
WP3	Development and Piloting
WP4	Training SME staff and VET students
WP5	Dissemination & Impact

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Equipment – drone: (slide 23)

The project needs to buy a Drone that costs 10,000.00 euros. BE4 will be in charge of buying it. In the Depreciation sheet, write that information. Note that Drones are an equipment that has a 5-year lifetime span, and the equipment will be 100% allocated to the project for 3 years (life-cycle of the project), therefore you only be able to finance 60% (=3/5years) of its cost.

Second Task (15 minutes): (slide 35-39)

You must **estimate a draft budget** for your institution's contribution to WP3, based on the tasks assigned.

Please use the excel template (**EXCEL FILE 2**) where all the costs for the remaining work packages and beneficiaries are already filled in.

Given Information:

- **Project Duration**: 3 years
- **Your Organization Type**: SME
- **Staff Involved**:
  - 1 Senior Scientist (full-time on project for 12 months)
  - 1 Lab Technician (50% FTE for 18 months)
- **Average Staff Costs**:
  - Senior Scientist: €5,000/month (gross salary incl. employer costs)
  - Lab Tech: €3,000/month (gross salary incl. employer costs)
- **Other Costs**:
  - Travel to 3 project meetings in Europe (2 people x 3 trips)
    - Estimated €600 per trip/person
  - Lab consumables for field trials: €10,000
  - Shipping samples to partners (Europe/Asia): €3,000
  - Overheads: 25% flat rate on eligible direct costs

Instructions for Participants:

1. Calculate **staff costs** (in person-months and €).
2. Estimate **travel**, **other direct costs**, and **indirect costs**.
3. Determine your **total budget request**.

Challenge to discuss: (slide 39)

How to cut from the proposed budget so that the total budget does not exceed €1M?

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