

**Interreg
Danube Region**



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HARMONMISSIONS

Modul 5

Implementation of EU Horizon projects

STEMWISE

Dr. sc. Adriana Planinić

Petar Gregurić, mag. ing. mech.

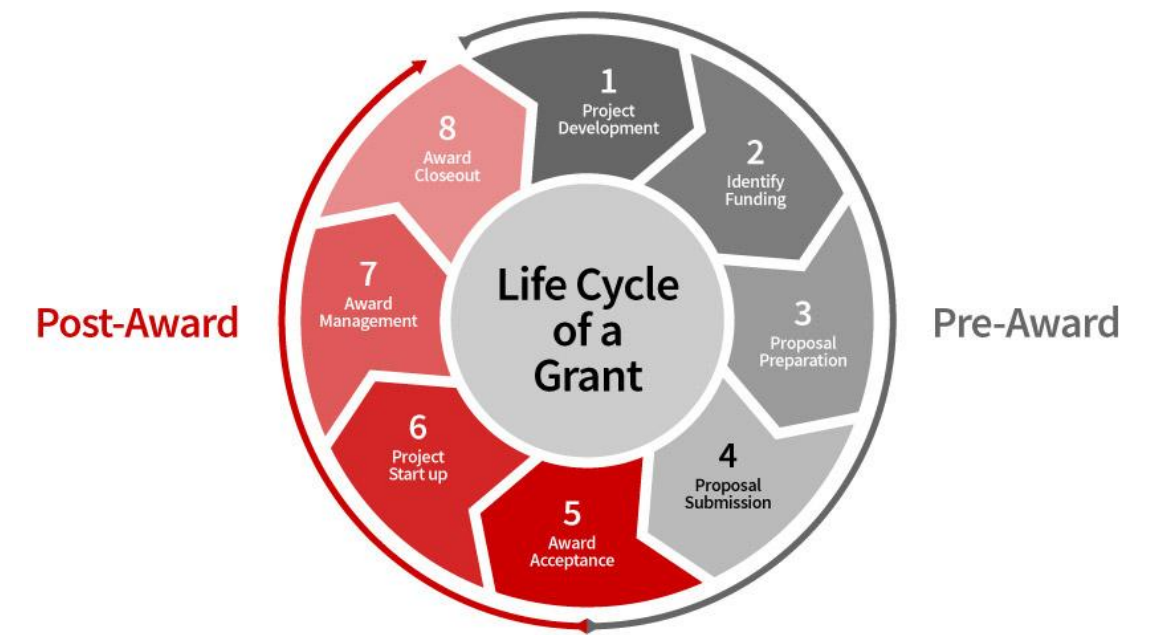
Your project got funded, what now!?



Managerial issues and sustainability of project outcomes

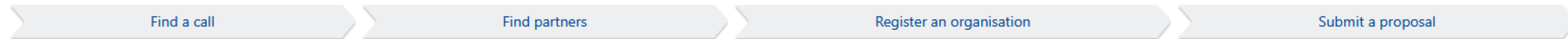
1. Crucial documents in Horizon Europe (EU Missions) projects: Description of Action (DOA); Grant Agreement; Consortium Agreement
2. Roles in the organization and access rights on EC Funding & Tenders Portal
3. Grant Agreement Preparation
4. Budget – Actual Costs and Lump Sum
5. Calculation of salary supplement for engagement in the Horizon Europe projects (In Croatian)
6. Work plan | Deliverables and Milestones
7. Project Management Tools and Methodologies
8. Data Management Plan
9. Different working groups- Steering Committee, Project coordinating Group
10. Kick off meeting- What to keep in mind
11. Progress Report and Periodic Report
12. Scientific Communication and Open Science
13. Gender Equality in Horizon Europe
14. Ethical Obligations in Horizon Europe

Grant Agreement Preparation

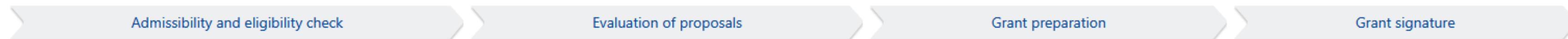


Grants

Applying for funding



Evaluation & Grant signature



Grant management



Roles in the organization and access rights

1. Legal Entity Appointed Representative (LEAR)- *organisation role*

The LEAR is the person that is officially nominated by an organisation to manage rights and obligations related to the use of the Portal and to act as main administrative and legal contact in case of issues. Usually, LEARs are staff members in the central administration of the organisation. The LEAR handles all the organisation-related data on the Portal and appoints the persons within their organisation that are allowed to electronically sign grants/contracts and cost claims.

There can only be one LEAR per organisation.

2 Account Administrator (AccAd)- *organisation role*

The LEAR may delegate tasks to one or more Account Administrators. Though the LEAR keeps the full responsibility, Account Administrators can fulfill tasks for their LEAR. An organisation can have an unlimited number of Account Administrators.

3. Legal Signatory (LSIGN)- *organisation role* → (Project Legal Signatory (PLSIGN))- *project role*

LSIGNs must be nominated for an organisation by the LEAR or an Account Administrator.

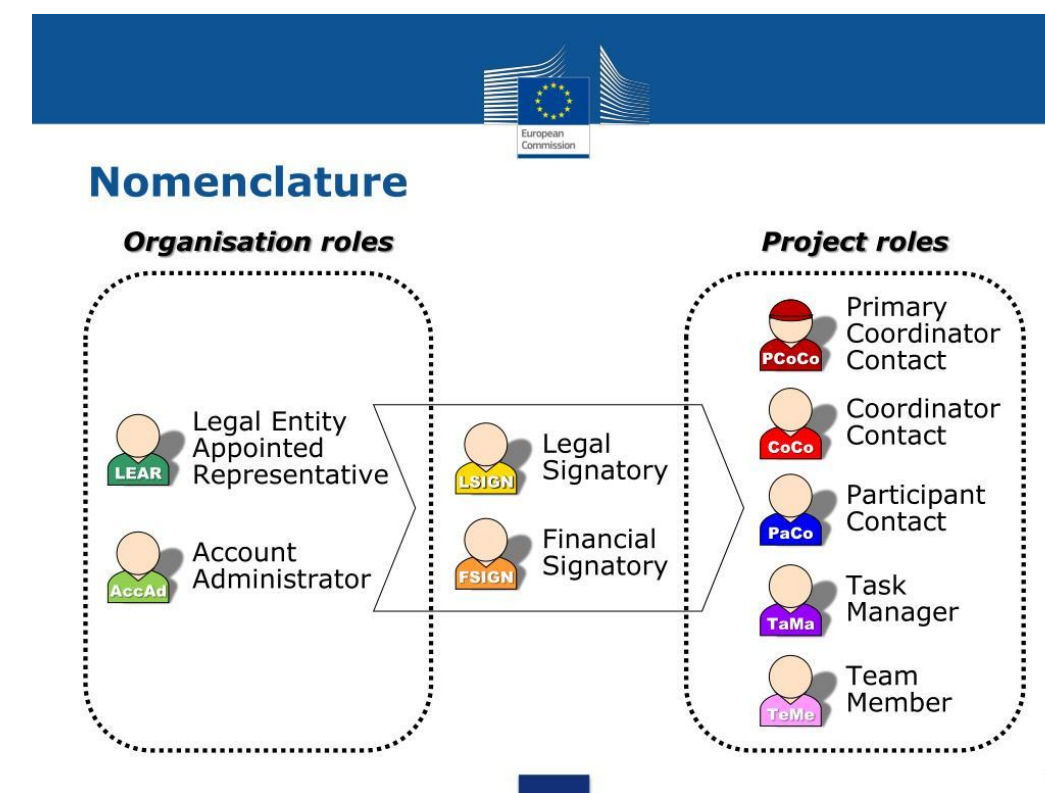
LSIGNs are assigned to a particular project by a Coordinator or Participant Contact. An organisation can have an unlimited number of LSIGNs.

4. Financial Signatory (FSIGN)- *organisation role*

FSIGNs must be nominated for an organisation by the LEAR or an Account Administrator.

FSIGNs are assigned to a particular project by a Coordinator or Participant Contact. An organisation can have an unlimited number of FSIGNs.

5. Primary Coordinator Contact (PCoCo); Task Manager; Team Member- *project role*



GA Preparatory phase

1 Sign the declarations of honour (DoH)

Before the Grant Agreement can be signed, the PLSIGN of each Beneficiary must sign a declaration of honour (grant declaration). For more details, see [Enter legal administrative & financial grant data](#).

2 Grant agreement ready for signature

The system prepares the Grant Agreement for signing (PDF document, digitally sealed to guarantee its security, reliability and authenticity).

3 Coordinator signs the Grant Agreement

The Coordinator's PLSIGN logs into the Portal **My Projects > Click the three dots button > Manage Project > Proposal Management & Grant Preparation > Sign**.

During signature, a pop-up explains that this means the signatory is preparing to sign. It then asks the PLSIGN to confirm that they wish to sign and a second prompt asks the PLSIGN to enter their EU Login password.

After signature, the system creates a new version of the PDF document (with a digital seal, a time stamp, and the signatory's EU Login credentials on the signature placeholder). The validity of the signature can be verified by opening it in a compatible PDF reader and clicking on the image of the digital signature.

The Grant Agreement can be previewed, downloaded or printed (before or after signature) from the Documents screen if desired.

The LEAR of the Coordinator and the other Beneficiaries are informed that the Coordinator has signed the Grant Agreement.

4 Granting authority signs the Grant Agreement

The EU Authorising Officer is prompted to countersign the Grant Agreement from their side (same procedure as under point 3).

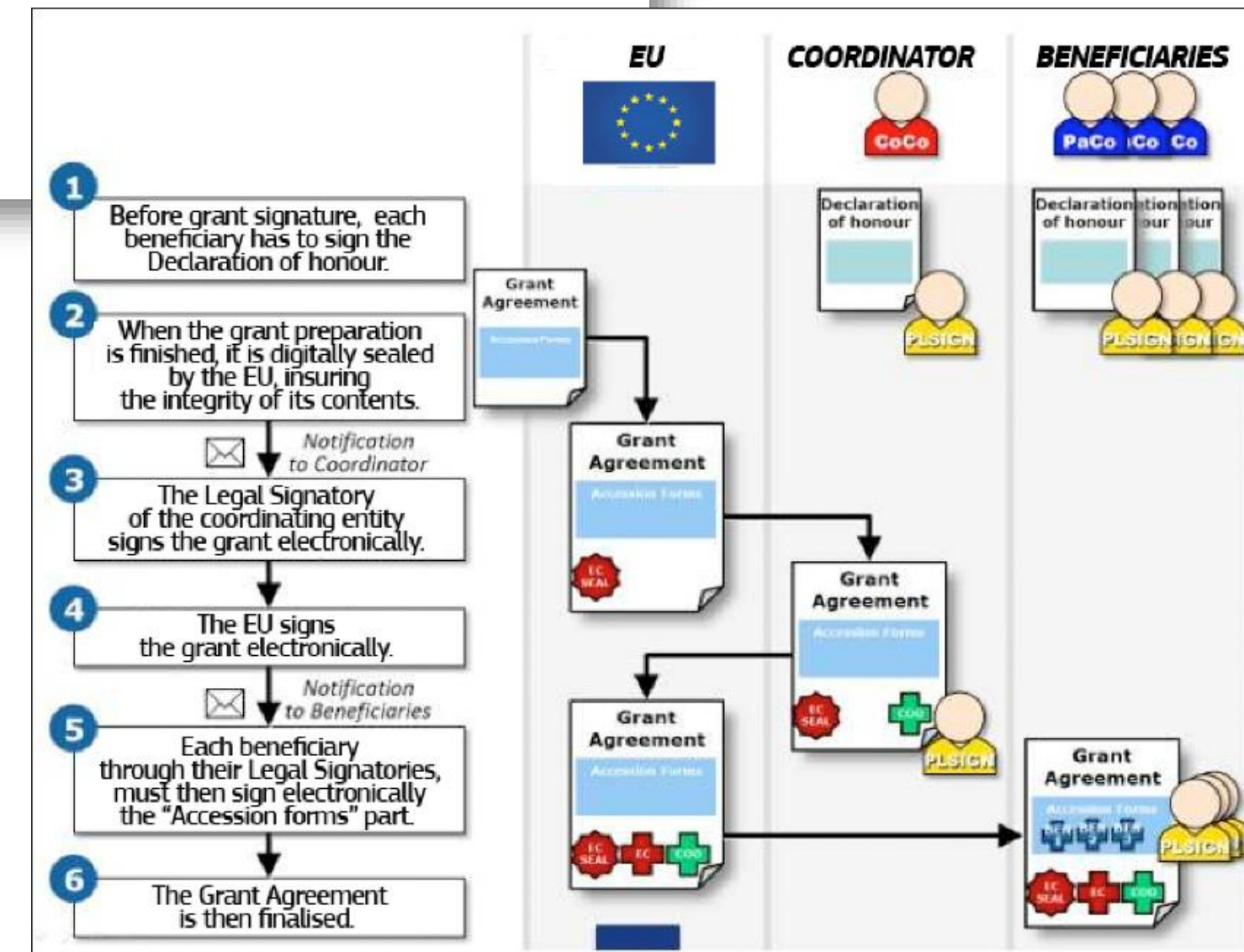
The Participants will be informed and the countersigned Grant Agreement will be available in their Portal Library (**My Projects > Click the three dots button > Manage Project > Document Library**).

5 Participants sign the Accession forms

All other Beneficiaries' PLSIGNs are prompted to sign their Accession Forms (same procedure as under point 3) — within 30 days after entry into force (signature by EU).

The CoCos and LEAR of the Coordinator and PaCo and LEAR of the concerned Beneficiary are notified when an Accession Form has been signed.

6 Grant Agreement is finalised



GA Preparatory phase

List of Documents

Declaration of Honor – signed by hand and scanned by every beneficiary PLSIGN (consortium partner)

DOA- prepared by the coordinator and uploaded to the portal

GA- prepared by the system/coordinator in a form of a PDF (digitally sealed to guarantee its security, reliability and authenticity)
signed by the coordinator PLSIGN and the EU Authorising Officer

Accession Form of the GA- signed electronically by each beneficiary PLSIGN

Consortium Agreement (CA)- prepared by the coordinator and signed by all project partners. EC commission only asks if the CA is signed, they do not need to see the document or sign it themselves.

In case of Cascading fundings, grantees sign the Sub- Grant Agreement.
Not with the EC, but with the Horizon Europe project coordinator!

Description of Action (DOA)

The description of the action (**DoA**, Annex 1) is structured like the application form into two parts, Parts A and B:

-**Part A:** contains the structured tables with project information (retrieved directly from the EC Portal- Grant Management System tabs)

-**Part B** (the narrative part): is created from Part B (the instructions for this are available on [Portal Reference Documents](#))

The system will merge the Parts A and B, generating a single PDF with the full description of the action (DoA).

All participants can contribute to the parts, but it is the Coordinator who will have to finalise and submit it.

Tasks of the Coordinator:

Workplan tables: Complete the workplan tables in Part A, (*work package descriptions, deliverables and milestones*)

Check that all PICs have been validated by the Central Validation Service

Quality check

Time to correct mistakes from the project proposal

Budget

Budget funding options in Horizon Europe Proposals

Horizon Europe proposals categorize project costs into direct and indirect costs. The specific categories and how they are handled depend on whether the project is funded under an **actual cost** grant or a **lump-sum** grant.

Budget- Actual Costs

- This is the traditional funding model where the grant amount is based on the actual expenses incurred during the project.
- Beneficiaries must meticulously track and report each cost to receive reimbursement
- Timesheets- (Hrv. vremenici)

Budget- Lump sum

- This is a simplified funding model where a fixed total amount is agreed upon for the project.
- Instead of reporting every cost, payments are released based on the completion of predefined work packages or deliverables.

Timesheets for Actual Costs

EU GRANTS DECLARATION OF DAYS WORKED ON A PROJECT			YEAR:	
<i>To be kept on file in case of audits.</i>				
Project acronym:		Project number:		
Participant name:				
Name of the person:		Type of personnel: <small>(employee/ natural person under direct contract/ seconded/ other)</small>		
Month	Days worked in the action ¹ <small>(e.g. 15; 7,5; 0,5; 0,25)</small>	Work Packages worked on <small>(e.g. WP2; WP5)</small>	Date and signature of the person	Name, date and signature of the supervisor
January			Signature: Date:	Name: Signature: Date:
February			Signature: Date:	Name: Signature: Date:
March			Signature: Date:	Name: Signature: Date:
April			Signature: Date:	Name: Signature: Date:
May			Signature: Date:	Name: Signature: Date:
June			Signature: Date:	Name: Signature: Date:
July			Signature: Date:	Name: Signature: Date:
August			Signature: Date:	Name: Signature: Date:
September			Signature: Date:	Name: Signature: Date:
October			Signature: Date:	Name: Signature: Date:
November			Signature: Date:	Name: Signature: Date:
December			Signature: Date:	Name: Signature: Date:
TOTAL				

Timesheet Horizon Europe

Month: **January** Year: **2024**

EU-Project 1: EU-Project 2:

Project title: Project title:

Grant Agreement No: Grant Agreement No:

Name of the person: **IMPORTANT:** Time records must be approved at least monthly by the person working on the action and their supervisor

Type of personnel:

weekly hours according to contract:

		Indicate the time in hours																															Total	
Date	Day	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
		Mon	Tue	Wed	Thu	Fri	Sat	Su	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Su	Mon	Tue	Wed		
EU-Projects:	WP																																	
0	total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
0	total	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
EU productive hours		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Absence:																																		
parental leave																																		

Signed (name of person carrying out the work): Supervisor's full name:

Date: Date:

Signature: Supervisor's Signature:

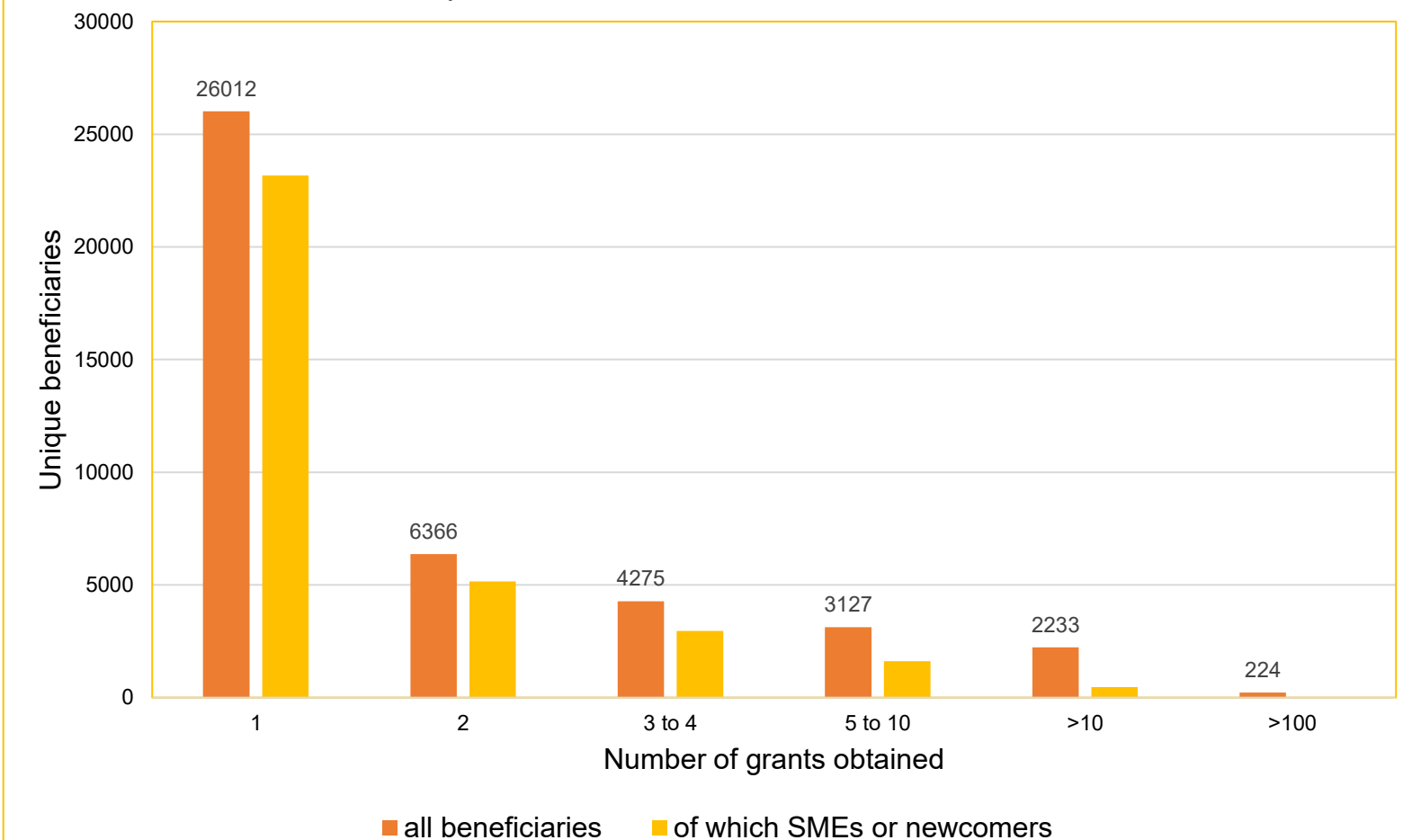
PLEASE NOTE THAT TIMESHEETS WITHOUT FULL NAME, DATE AND SIGNATURE WILL BE REJECTED BY THE AUDITORS

Why do we use lump sum funding?

Easier access to the programme

- Very small share of beneficiaries have more than 100 grants:
 - Large entities
 - Dedicated staff and procedures to deal with actual costs
- Vast majority of beneficiaries have only 1 or 2 grants per programme
 - Most of them SMEs or newcomers
 - Little or no previous experience
 - Need a simple funding model

Participation of 42k beneficiaries in H2020



Benefits of Lump Sum

- Funding based on reimbursement of real costs remains complex and error-prone. Little scope for further simplification
- Lump sums remove the obligation to report actual costs and resources
- Easier to use for beneficiaries with limited experience
- Focus less on financial management and more on content

Adjusted project design is needed (Work packages)

Work packages with a long duration may be split along the reporting periods (e.g., Management, Dissemination and Exploitation, etc.). In this way, the relevant activities can be paid at the end of the reporting period.

Budget allocation (annex 2 to the grant agreement)

	WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	Total
Beneficiary A	250.000			50.000	300.000	250.000		300.000	1.150.000
Beneficiary B		250.000	350.000	50.000			100.000	150.000	900.000
Beneficiary C	100.000	100.000		50.000		280.000			530.000
Beneficiary D		120.000		50.000			100.000	150.000	420.000
Total	350.000	470.000	350.000	200.000	300.000	530.000	200.000	600.000	3.000.000

Shares of the lump sum per beneficiary

Shares of the lump sum per WP

Lump sum = Maximum grant amount

You can **use the budget as you see fit** as long as the project is implemented as agreed. The actual distribution of the lump sum is invisible to EC.

Budget transfers between work packages and/or partners require an amendment if the consortium wants to reflect them in the grant agreement.

Payment schedule

Types of payments:

Connected to the number of Periodic Reports

Pre-financing payment



- Same function and same rules as for other grants
- Coordinator distributes the amount according to the consortium agreement

Interim payment(s)



- One or more
- EC Pays the shares of the lump sum set out in Annex 2 for the work packages completed & approved in the reporting period

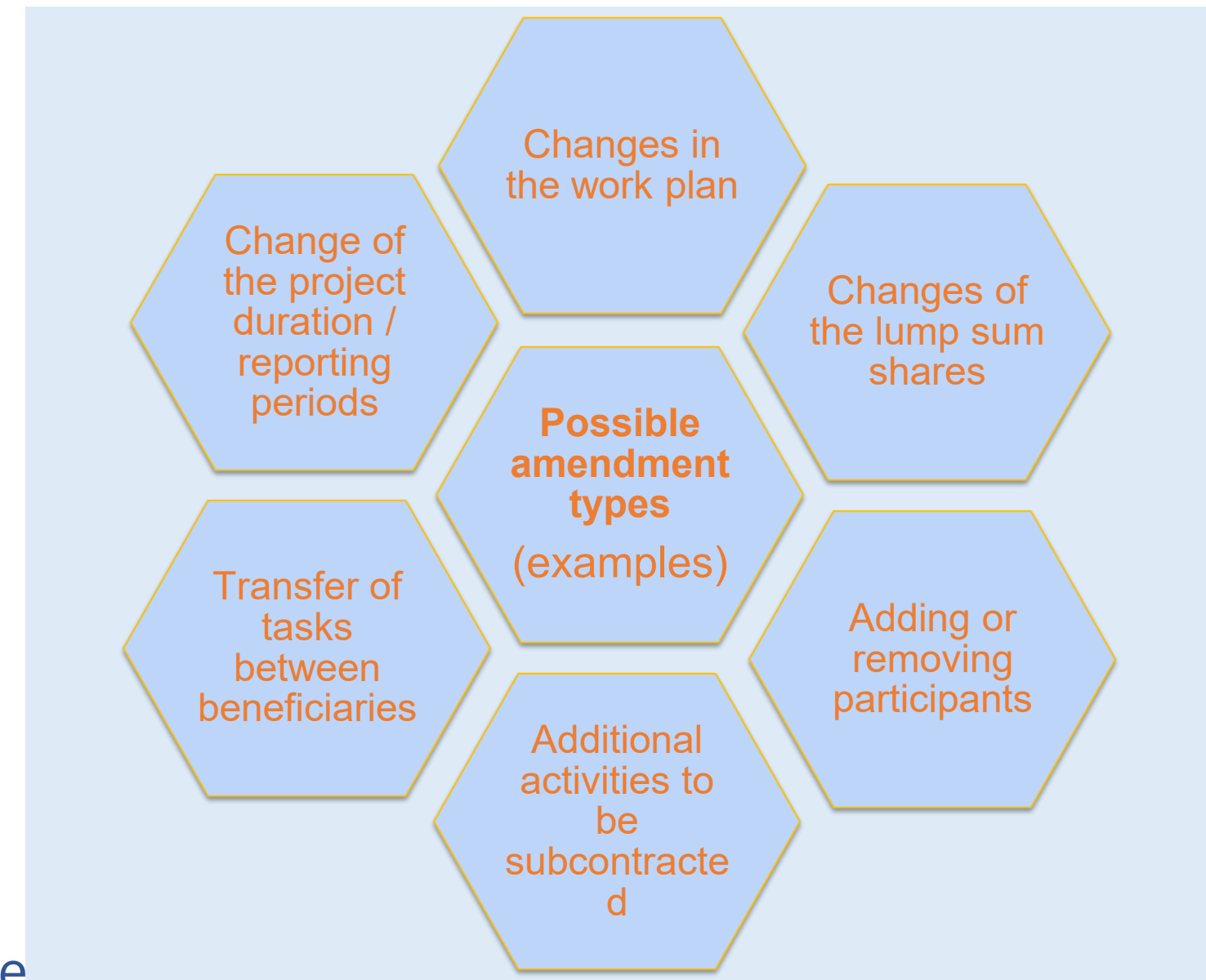
Payment of the balance



- Closes the financial aspects of the grant
- Partial payment for partially completed WPs possible
- Releases the amount retained for the Mutual Insurance Mechanism

Amendments

- Lump sum grants **can be amended**.
- **Same procedure and conditions** as for all Horizon grants.
- Lump sum work packages that have already been paid **cannot be amended**.
- **Deviations** from the work plan can also be flagged in the periodic report (**simplified procedure**).



Reporting and payment

- Use the **standard reporting template**
- The coordinator declares work packages as **Completed** or **Not Completed**. This should be justified by the technical periodic report.
- An incomplete work package can be completed and paid in a subsequent reporting period.
- At the final reporting period, it is possible to declare **Partially Completed** work packages, and to enter the percentage of completion.

Status of completion SAVE

Number	Title	Lead Beneficiary	Status of Completion	Completion %
WP1	wp1	AST GmbH	Partially Completed	60.00
WP2	wp2	AAA	Completed	100.00
WP3	wp3	AST GmbH	Partially Completed	50.00
WP4	wp4	AAA	Not Completed	0.00
WP5	wp5	AST GmbH	Not Completed	0.00

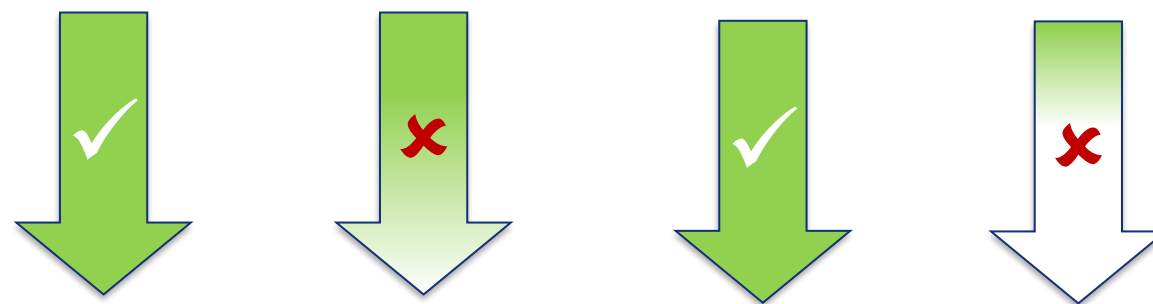


The completion of work packages is not based on a successful outcome, but on the **completion of activities** as described in the description of action.

Reporting and payment

- The financial report is much **simplified** and to a large extent automated.
- The financial statement for all beneficiaries is **automatically generated** (based on the accepted work packages and the corresponding lump sum shares).

	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



$$\text{Payment} = 350\ 000 + 0 + 350\ 000 + 0 = 700\ 000\ \text{€}$$

Interim payments pay the lump sum shares for completed work packages.

Final payments can also pay partially completed work packages.

Keeping records during project implementation phase

You need (e.g.)



- Technical documents
- Publications, prototypes, deliverables
- Documentation required by good research practices such as lab books
- ...any document proving that the work was done as detailed in Annex 1

You don't need



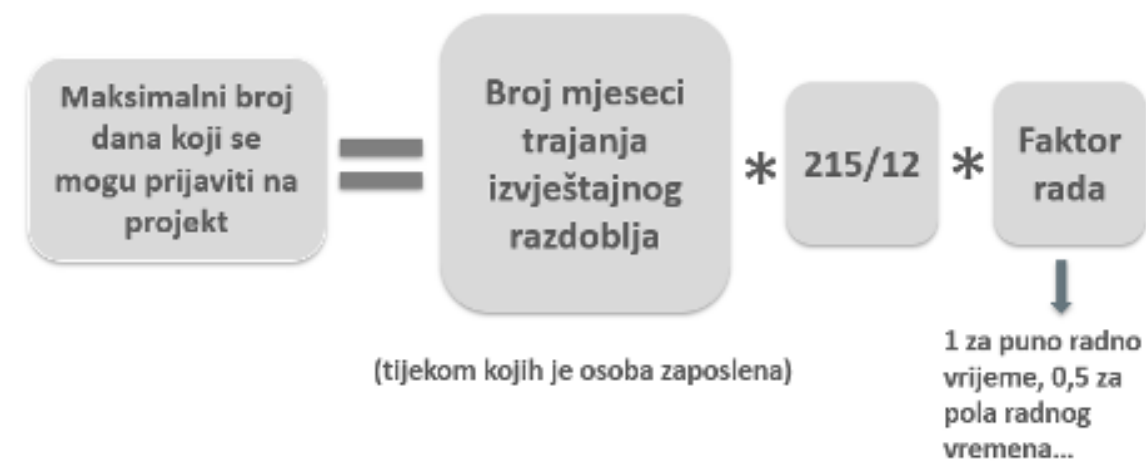
- Time-sheets
- Pay-slips or contracts
- Depreciation policy
- Invoices
- ...any documents proving the actual costs incurred

Same as for all Horizon Europe grants

Calculation of salary supplement for engagement in the Horizon Europe projects (In Croatian)

1. Korak

Izračunati maksimalan broj dana koji se mogu prijaviti na projektu/*maximum declarable day equivalents* za zaposlenike s punom satnicom i pola radnog vremena.



Maksimalan broj dana koji se mogu prijaviti na projektu/*maximum declarable day equivalents*

Za izvještajno razdoblje od 18 mj. i puno radno vrijeme: $18 * 215 / 12 * 1 = 322,5$

Za izvještajno razdoblje od 18 mj. i pola radnog vremena: $18 * 215 / 12 * 0,5 = 161$

Calculation of salary supplement for engagement in the Horizon Europe projects (In Croatian)

2. Korak

Izračunati dnevnicu za pojedine članove tima koristeći se iznosom Bruto 2 plaće. Suma Bruto II za svih 18 mjeseci provedbe projekta se podijeli s maksimalnim brojem ekvivalentnih dana (Bruto II službeno zatražiti od računovodstva).



Dnevnice će se razlikovati prema poziciji i senioritetu u timu cca **130–250 €**

Calculation of salary supplement for engagement in the Horizon Europe projects (In Croatian)

3. Korak

Izračunati trošak istraživača prema udjelu rada na projektu.

Primjerice za voditelja projekta računamo da je provedbi navedenog projekta posvetio 20% svog radnog vremena i time od maksimalnog broja dana koji se mogu prijaviti na projektu (322,5) za isplatu dodatka na plaću u navedenom razdoblju prijavio 64,5 dana prema računici: $18 \cdot 215 / 12 \cdot 0.2 = 64,5$

Nadalje se broj dana množi s dnevnicom: $64,5 \cdot 250 \text{ €} = 16\ 125 \text{ €}$

Međutim, ako se računa da je udio rada na projektu 100%, onda se trošak istraživača računa tako da se dobivena dnevnicica pomnoži sa stvarnim radnim danima na projektu. Stvarni radni dani na projektu se dobiju pretvaranjem utrošenih PM (Person Month- obračunaska jedinica rada) kroz sve radne pakete i taskove u izvještajnom period u realne radne dane tako što se iznos PM pomnoži s maksimalnim mogućim brojem ekvivalentnih radnih dana ($\text{PM} \cdot 215/12$).

Primjerice, ako je voditelj projekta za 18 mjeseci trajanja projekta utrošio 7 PM, to pretvaramo u radne dane na sljedeći način:
 $7 \cdot 215 / 12 = 125$ radnih dana

Trošak istraživača: 125 radnih dana * dnevnicica od 250€ = 31250 €

Dobiveni iznos se podijeli s brojem mjeseci i isplaćuje redovito vodeći računa da iznos ne prelazi propisan maksimalan iznos dodatka na plaću.

Data Management Plan (DMP)

During the proposal development stage applicants must provide maximum 1 page on how the data / research outputs will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable) – this is part of the Methodology section under Criterion 1 Excellence.

During implementation of the project a DMP is a mandatory project deliverable due by the end of Month 6. DMP has to be reviewed and updated at least at the time of the mandatory reporting to the funding authority.

Contents of a DMP

- Types of data/research outputs** (e.g. experimental, observational, images, text, numerical) and their estimated size; if applicable, combination with, and provenance of existing data.
- Findability of data/research outputs:** Types of persistent and unique identifiers (e.g. digital object identifiers) and trusted repositories that will be used.
- Accessibility of data/research outputs:** IPR considerations and timeline for open access (if open access not provided, explain why); provisions for access to restricted data for verification purposes.
- Interoperability of data/research outputs:** Standards, formats and vocabularies for data and metadata.
- Reusability of data/research outputs:** Licenses for data sharing and re-use (e.g. Creative Commons, Open Data Commons); availability of tools/software/models for data generation and validation/interpretation /re-use.
- Curation and storage/preservation costs;** person/team responsible for data management and quality assurance.

Different working groups (Project coordinating Group, Steering Committee)

Horizon Europe Mission projects, have strong policy, societal, and demonstration-oriented dimensions. These projects typically involve multi-actor partnerships, large-scale pilots, and citizen engagement

General Assembly

Meets at least once a year and is made of all project partners

Project Coordination & Governance Working Group

Ensures overall strategic direction, decision-making, and alignment with the **Mission Implementation Plan** and EC priorities. Oversees reporting, budget, and partner coordination.

Steering Committee

Plays a central role in strategic and managerial oversight. It is usually composed of one representative from each partner organisation (often the coordinator and work package leaders) and serves as the main decision-making body of the consortium

Scientific & Technical Implementation Working Group

Leads the **research, innovation, and demonstration activities**, integrating scientific expertise with applied solutions.

Pilot & Demonstration Sites Working Group

Manages the **on-the-ground implementation** in regions, cities, or communities participating as demonstration sites. Focuses on scaling and replicability of solutions across Europe.

Stakeholder & Citizen Engagement Working Group

Central to Mission projects, this group coordinates **citizen involvement, co-design workshops, and participatory approaches**, ensuring solutions are socially accepted and locally relevant.

Data, Monitoring & Impact Assessment Working Group

Oversees **data collection, indicators, and progress tracking** toward the Mission's measurable targets (e.g. climate resilience, carbon neutrality). Ensures use of FAIR data and open science practices.

Communication, Dissemination & Exploitation Working Group

Designs and implements the project's **communication strategy**, manages visibility, dissemination of results, and exploitation pathways — including policy uptake and long-term sustainability.

Ethics, Legal & Risk Management Working Group

Ensures compliance with **ethical standards, data protection (GDPR), and risk management**. Provides oversight for legal and safety aspects of the pilots and stakeholder engagement activities.

Importance of a kick off meeting

- **Launches the project officially** and marks the start of the implementation phase after Grant Agreement signature.
- **Aligns all partners** on objectives, work plan, timelines, and expected outcomes.
- **Clarifies roles and responsibilities** of each partner, work package leader, and coordination structure.
- **Establishes communication and reporting procedures**, ensuring smooth collaboration across the consortium (SharePoint, MS Teams).
- **Sets common understanding** of administrative, financial, and ethical requirements under Horizon Europe rules.
- **Facilitates team building** and strengthens relationships among consortium members.
- **Provides an opportunity for direct interaction with the Project Officer**, who can clarify expectations and answer questions.
- **Initiates discussions on upcoming deliverables and milestones**, ensuring early alignment (1-6M, 1-12M).
- **Identifies potential risks or challenges** and agrees on mitigation measures from the outset.
- **Creates project visibility**, often serving as the first public event or communication opportunity (project logo, templates, web).



Deliverables and Milestones

- Deliverables** are key outputs produced during the implementation of a Horizon Europe project. They serve as tangible evidence of progress and ensure that project activities are on track toward achieving their objectives. Each deliverable corresponds to a specific task or work package and can take various forms, such as reports, datasets, prototypes, or guidelines. Submitting deliverables on time and with high quality is essential for demonstrating accountability to the European Commission and maintaining smooth project monitoring and evaluation.
- Milestones** represent significant control points within a Horizon Europe project that help assess progress and decision-making. They mark the completion of critical stages or the achievement of specific objectives, allowing the consortium and the European Commission to verify that the project is moving in the right direction. Milestones often trigger reviews, adjustments, or the start of subsequent phases, ensuring that risks are managed and corrective actions are taken when necessary. Together with deliverables, they form the backbone of effective project tracking and management.

Grant Management | Project Continuous Report

221080 (221080 ANIBANA ...) ERASMUS-OG

Call: ERASMUS-JMD-2021-JMSC-OG-IBA
Topic: ERASMUS-2021-JMSC-CIFE-OG-IBA

Deliverables and Other Reports

For each Deliverable, a single file (max 52MB) can be uploaded

Add actual delivery dates (or new due date for late deliverables, together with an explanation for the delay). In the Comments, please indicate if the deliverable was achieved as planned or not.

The labels used mean:

- Public – fully open
- Sensitive – limited under the conditions of the Grant Agreement
- EU classified – RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision 2015/444

Work Pa	Deliver	Deliver	Deliverable Name	Description	Lead	Type	Dissemi	Due Date	New Due D	Delivery D	Approval Date	Status
WP1	D1.1	D1	D1 - Deliverable title creat	Deliverable description created at 22/06/2021 0... ES	AST	Website	Confide	21 Feb 20				Draft

Grant Management | Project Continuous Report

215364 (215364 SAMUJEST ...) CSA

Call: H2020-SCC-2014-2015
Topic: SCC-03-2015 Unit: CHECT/R/02

Deliverables, Ethics, DMP, Other Reports

For each Deliverable, a single file (max 52MB) can be uploaded

WP No	Del Ref.	Del No	Title	Description	Lead	Nature	Dissemi	Est. Del. D	Rev. Due D	Receipt Da	Approval Date	Status
WP1	D1.1	D1	Test	Test	AST	ORDP: Public		29 Feb 20				Draft
WP1	D1.2	D2	D2 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP1	D1.3	D3	D3 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP1	D1.4	D4	D4 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP1	D1.5	D5	D5 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP1	D1.6	D6	D6 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP1	D1.7	D7	D7 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP1	D1.8	D8	D8 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending
WP2	D2.1	D9	D9 - Deliverable title creat	Deliverable description created at 28/04/2021 1...	AST	ORDP: Confide		29 Feb 20				Pending

Progress Report vs. Periodic Report

Progress Report (continuous reporting)

Submitted **throughout the project** (not strictly tied to the end of a reporting period).

It is **not linked to payment**.

Purpose: update the European Commission (EC) on project implementation.

Content includes:

- Deliverables submitted
- Milestones reached
- Dissemination, communication, exploitation activities
- Publications, patents, ethics, gender, open science, etc.

Think of it as an **ongoing monitoring tool** for the EC.

Periodic Report

Submitted **at the end of each reporting period** (e.g. after 18 months, depending on the Grant Agreement).

It **triggers the payment**.

Content has two main parts:

- **Technical part:** description of work carried out, results, deviations, use of resources.
- **Financial part:** in lump sum projects, **no cost reporting**, instead, you declare whether each **work package is completed (yes/no)**. Payment is made for the lump sum share of completed work packages.

Essentially, the EC checks: *“Did you deliver the agreed work package(s)?”* If yes → you get the corresponding lump sum.

Effective project tracking and management

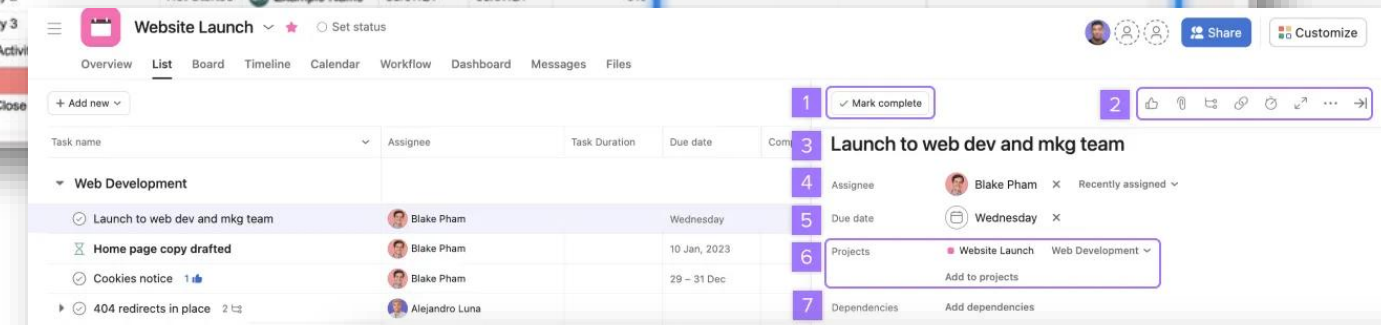
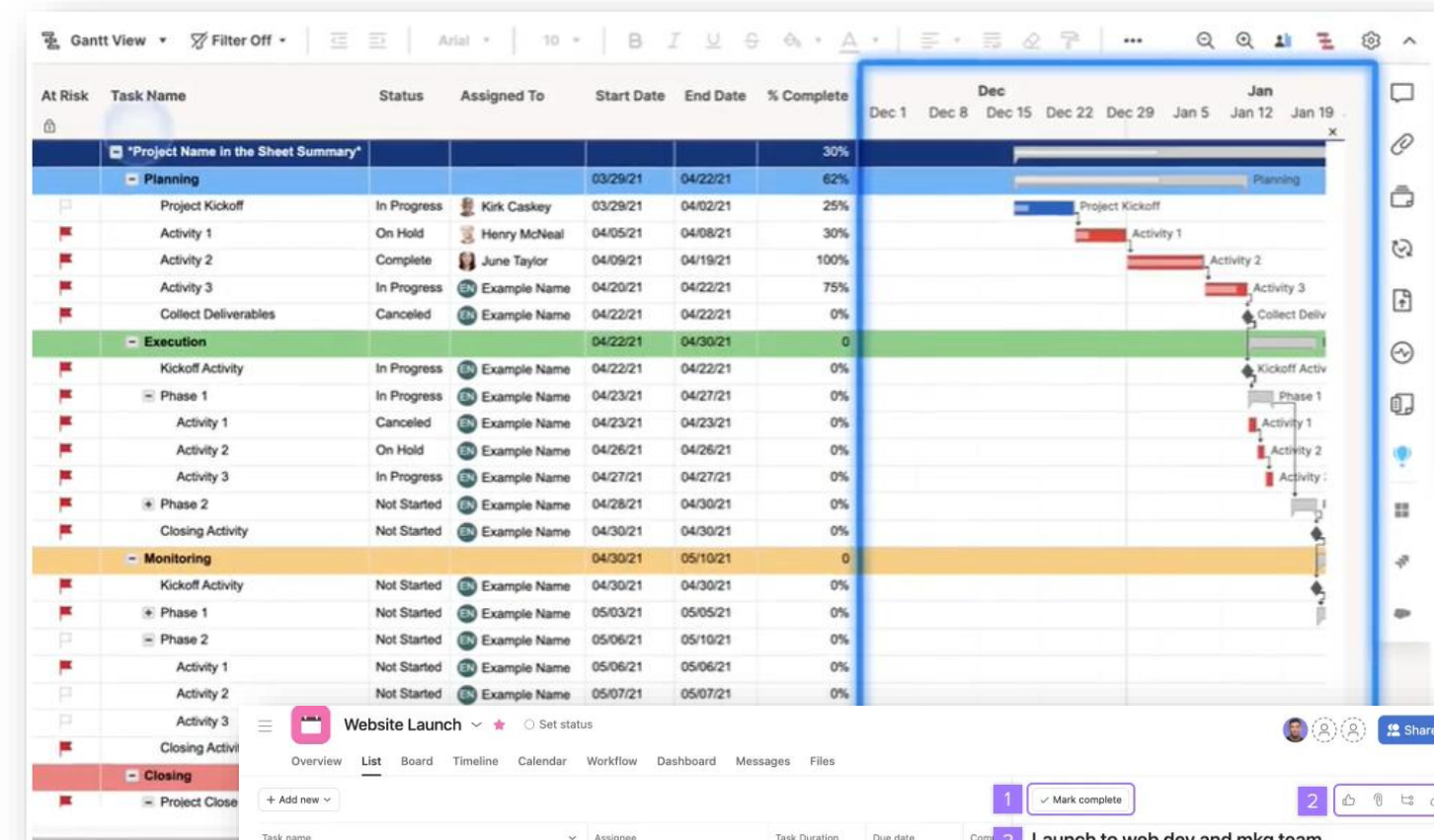
Smartsheet

Horizon Europe Suite Pro

Asana

Basecamp

Harvest



STEMWISE

Make a new project Invite people

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RECENT PROJECTS

- BrainGen-CARE
- BTL - COP
- Cascade funding - CORIB
- Clearshift
- Edukacija u Čakovcu
- Futural
- Horizon Europe Summit 2025
- Sample Making a Podcast
- NASCHA
- Routes to synergies
- STEMwise - general

Open Science and Science Communication

Publishing fee can and should be included in the project budget!

Key Open Science requirements and best practices for Horizon Europe projects, based on European Commission guidance:

Open Access to Scientific Publications – All peer-reviewed scientific publications resulting from Horizon Europe funding must be made immediately open access (no embargo period). This includes providing free access to the publication and its metadata in a trusted repository.

Peer-reviewed scientific publications (primarily research articles published in academic journals)

Research Data Management and FAIR Principles – Projects must manage data responsibly through a Data Management Plan (DMP) and ensure data are Findable, Accessible, Interoperable, and Reusable (FAIR). Data should be deposited in trusted repositories following the principle “as open as possible, as closed as necessary.”

Scientific research data: data underlying publications and/or other data (such as curated but unpublished datasets or raw data)

Early and Inclusive Knowledge Sharing – Open Science promotes collaboration across disciplines and sectors. Sharing research outputs, methods, and tools early in the process enhances transparency, fosters innovation, and allows other researchers and stakeholders to build upon the results.



Responsible Research Assessment – Horizon Europe encourages moving beyond metrics like journal impact factors and focusing instead on the quality, openness, and societal impact of research outputs, aligning with the principles of responsible research and innovation (RRI).



Citizen and Stakeholder Engagement – Open Science supports co-creation with citizens, policymakers, and industry, ensuring that research addresses real-world challenges and has greater societal relevance and impact.



Gender Equality in Horizon Europe

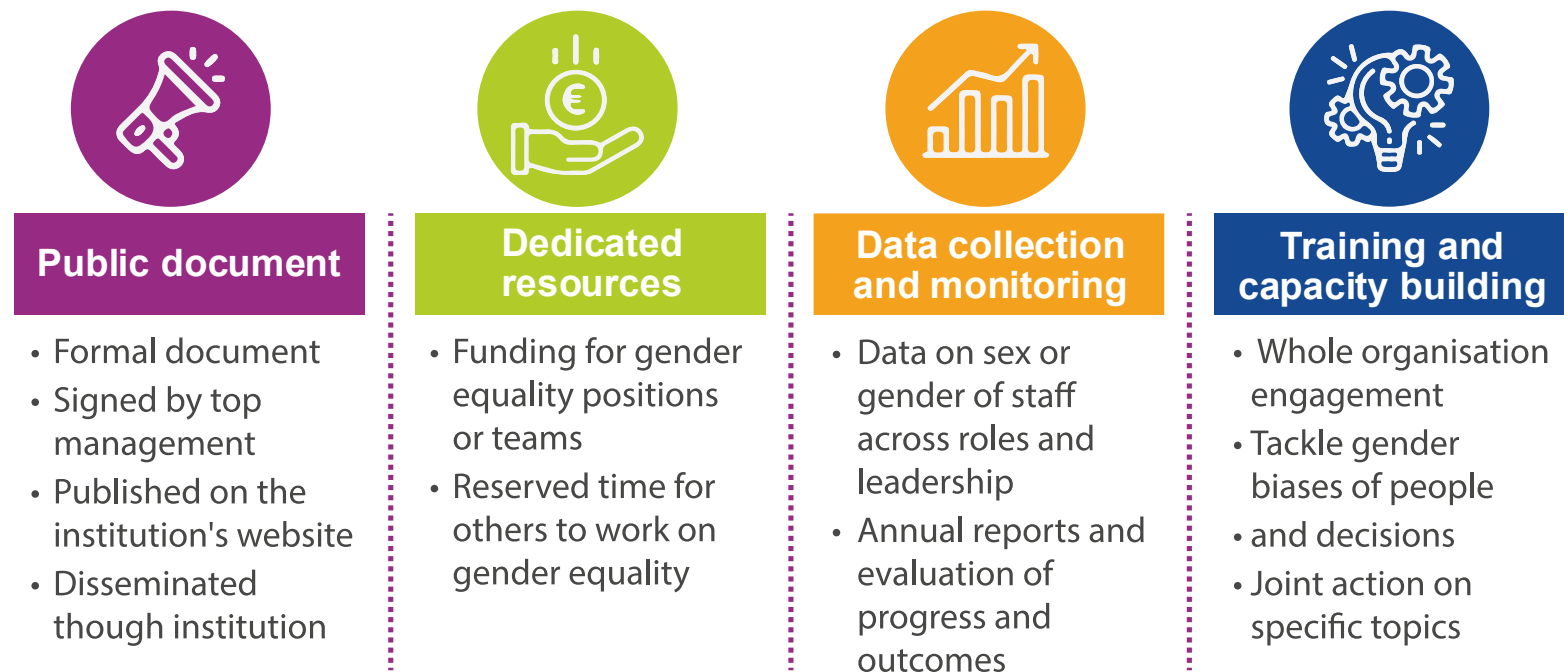
3 main levels at which gender equality is addressed in Horizon Europe as transversal criteria in all proposals and parts of the Programme

Having a **Gender Equality Plan (GEP)** in place is now an eligibility criterion for certain categories of legal entities from EU countries and non-EU countries associated to Horizon Europe

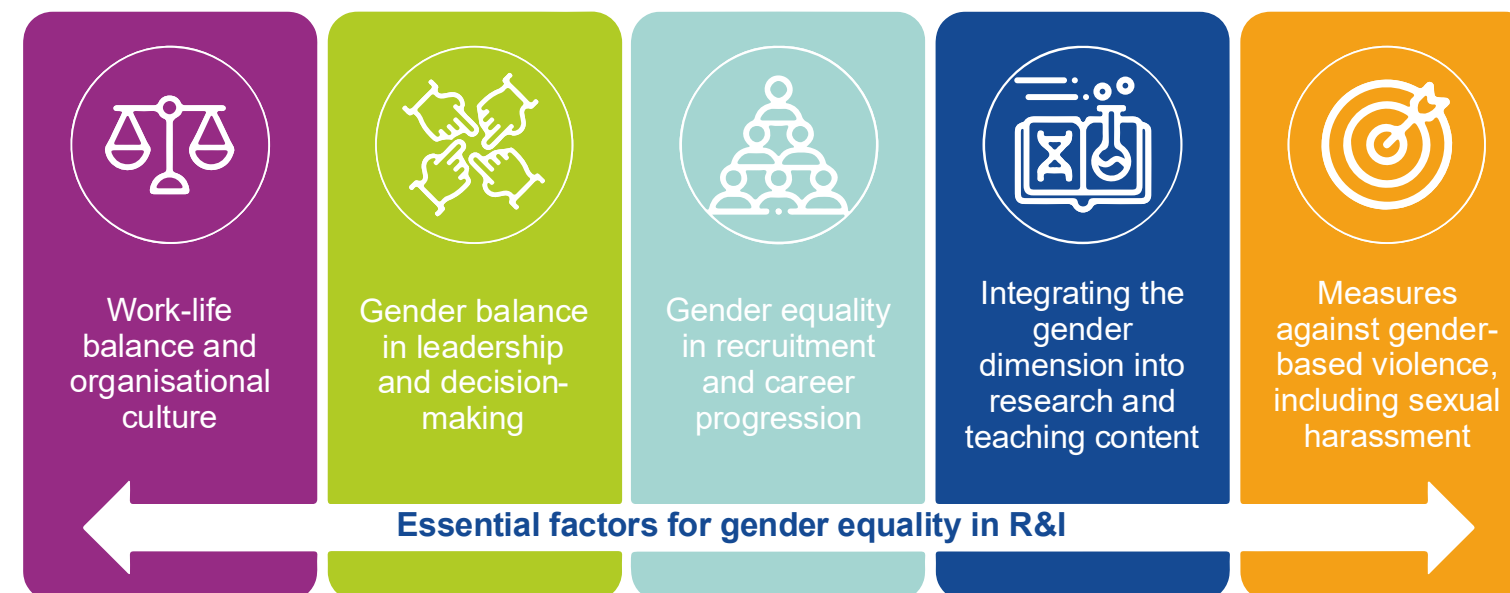
The integration of a **gender dimension into R&I** content is a requirement by default, and evaluated under the excellence criterion, unless the topic description explicitly specifies otherwise

Increasing **gender balance** throughout the programme is another objective, with a target of 50% women in Horizon Europe related boards, expert groups and evaluation committees, and gender balance among research teams set as a ranking criterion for proposals with the same score

Mandatory GEP process requirements



Recommended GEP content areas



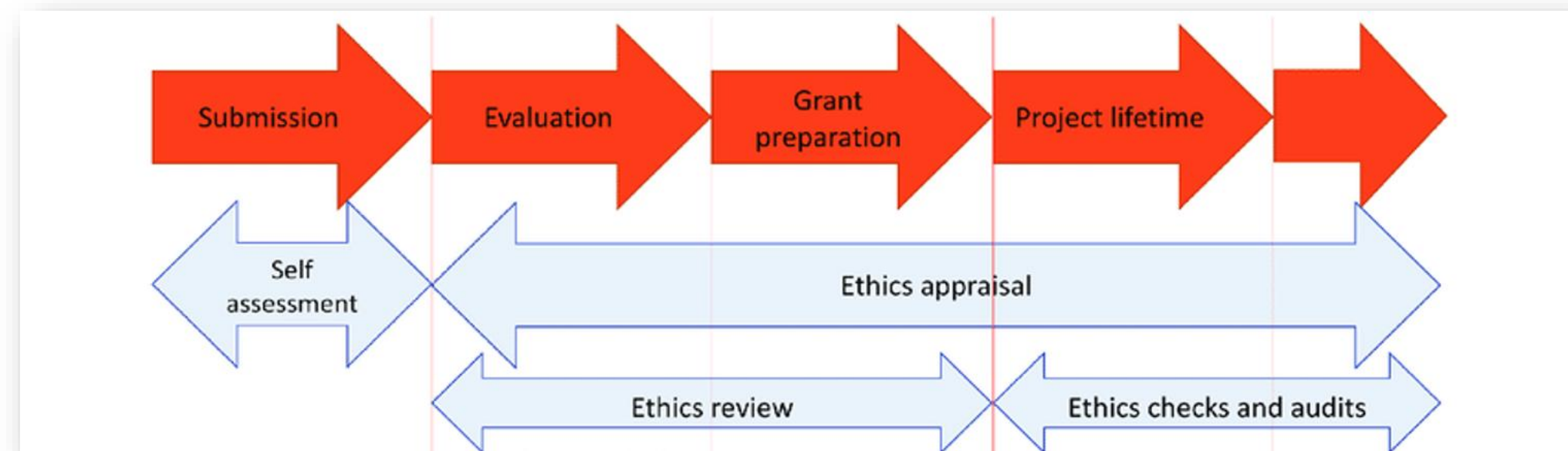
Ethical obligations in Horizon Europe

The ethics review covers issues as:

- human rights and protection of human beings
- animal protection and welfare
- data protection and privacy
- health and safety
- environmental protection
- use of AI

The EU Commission's ethics appraisal process

involves a self-assessment by the applicant, followed by an independent review by ethics experts to ensure the project adheres to ethical principles and relevant legislation. The process is multi-phased, starting with a pre-screening to identify potential issues, progressing to a screening, and finally to a comprehensive assessment. The outcome can range from full clearance for grant signature to conditional clearance, where contractual obligations are added to the grant agreement, or in some cases, the proposal may not be funded



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