

Q&A: Global Health EDCTP3 Work Programme 2026

1. General questions across topics:

1.1 Can any legal entity (e.g. non-governmental institutions) established in a SSA country that is an EDCTP Association member be coordinator (lead applicant) of a proposal?

No. As provided for in the Global Health EDCTP3 Work Programme, coordinators can only be established in European Union Member States, countries associated to Horizon Europe or South Africa.

1.2 Is it possible for a legal entity to participate in a proposal even if it is based in a country that is not an EDCTP Association member?

In principle, any legal entity, regardless of its place of establishment, including legal entities from third countries non-associated to Horizon Europe or international organisations, is **eligible to participate** (whether it is eligible for funding or not)¹.

Furthermore, to be **eligible for funding**, legal entities must be established in one of the Member States of the European Union, or in a country associated to Horizon Europe or a country that is a member of the EDCTP Association.

Legal entities not eligible for funding can still participate in Global Health EDCTP3 projects in other roles, for example as associated partners.

1.3 Can a legal entity established in a country which not a European Union Member State, nor associated to Horizon Europe, nor a member of the EDCTP Association, participate as a consortium member?

Yes, though in principle without receiving funding. Please see previous answer to question 1.2.

1.4 Who can participate in Global Health EDCTP3 calls?

Participation is generally open to all legal entities, regardless of their place of establishment; however, eligibility for funding is restricted to organisations based in the European Union Member

¹ Provided that the conditions laid down in the Horizon Europe Regulation have been met, along with any other conditions laid down in the specific call topic. Please also note that the General Annexes of the Horizon Europe Work programme also establishes exceptions for example for entities established in Russia or Belarus.

States, in countries associated to Horizon Europe and in countries that are members of the EDCTP Association.

1.5 Belgium is a member country of the EDCTP Association but Belgium is represented by at least three regions. Are Flanders, Brussels and Wallonia all EDCTP Association members?

Belgium is both a member country of the EDCTP Association as well as a European Union Member state, therefore organisations established in any of its regions can participate as beneficiaries and request funding.

1.6 From the collaboration aspect, the consortium should include a minimum composition of three different entities - should they be from different countries? Or can they be within the same country, for example, from South Africa? Can there be at least one collaborator from the same country?

The consortium must include as beneficiaries:

- At least three legal entities independent from each other and each established in a different country, where legal entities are eligible to receive funding;
- At least one independent legal entity established in a European Union Member State, or in a country associated to Horizon Europe that is a member of the EDCTP Association; and
- At least one independent legal entity established in a sub-Saharan African country that is a member of the EDCTP Association.

According to the first condition, at least three of the entities should be established each in a different country, where legal entities are eligible for funding. Additionally, the coordinator must be established in a European Union Member State or country associated to Horizon Europe, or South Africa.

1.7 Must all the members of a consortium be entities established in countries that are members of the EDCTP Association, or is it enough if the coordinator is established in such a country?

Not all members of the consortium must be established in EDCTP Association member countries.

The requirements for a consortium to be eligible are:

- At least three legal entities independent from each other and each established in a different country, where legal entities are eligible to receive funding;
- At least one independent legal entity established in a European Union Member State, or in a country associated to Horizon Europe that is a member of the EDCTP Association; and
- At least one independent legal entity established in a sub-Saharan African country that is a member of the EDCTP Association.

1.8 In how many calls can a scientist or an institution participate?

Institutions: as long as the institution is eligible (please check the eligibility criteria for each specific call) for funding, there is no limit. However, please keep in mind that an activity cannot be doubly funded.

Scientist (employed): In case of work on multiple actions per year, the total number of day-equivalents declared across EU grants for the person cannot be higher than 215 per calendar year (or the corresponding pro-rata by multiplying 215 with the working time factor), to avoid double-funding of personnel cost.

1.9 Can a UK institution be the coordinator of a proposal/project?

The UK can be coordinator of a proposal/project since the UK is a country associated to Horizon Europe.

1.10 Kindly confirm how to check whether a country is a member of the EDCTP Association?

Please check here the website of the EDCTP Association: <https://www.edctp.org/about-us/governance/general-assembly/members-of-the-general-assembly/>

1.11 It seems that the list of member states eligible for funding is in contradiction with the reference document on the EU portal where interested parties are referred to "eligible countries" in General Annexes of Horizon Europe Work Programme. For example, Madagascar is not a country member of the EDCTP Association but is mentioned in the General Annexes. Which list includes all countries in which the legal entities should be established to be eligible and applicants should refer to?

Please refer to the Global Health EDCTP3 Work Programme 2026, where the list of all countries is clearly presented under section 4.1.2.4 (Specific conditions to Global Health EDCTP3). The rules for eligibility for funding of Global Health EDCTP3 differ from the standard rules under Horizon Europe.

In particular, for the most up-to-date list of EDCTP Association member countries, please refer to the EDCTP Association website: <https://www.edctp.org/about-us/governance/general-assembly/members-of-the-general-assembly/>

1.12 Although the U.S. is unable to receive funding as a partner can they be subcontracted?

A US entity is not established in a country eligible for JU funding, therefore it can participate as beneficiary or associated partner with its own funding. For a US entity to receive funding, this entity should be considered essential for implementing the action. The "essentiality" of an entity is assessed by the independent experts during the evaluation and decided by the granting authority.

Entities from the USA may be eligible as contractors (beware that contractors may not perform action tasks of a project, only provide goods or services) but in principle not subcontractors. Allowing them as subcontractors would in general result in circumventing the rules on eligibility for funding. We could nevertheless consider such an option in exceptional circumstances, if it is essential to involve a given entity for a project to be viable. Such an assessment would be made in an analogous way to the one we make for entities that request funding as beneficiaries whereas they are not eligible for it in principle.

1.13 Who are the stakeholders that are expected to apply to the CSA calls?

Eligibility criteria regarding the composition of the consortium and the entities requesting funding must be complied with. Furthermore, it is the responsibility of applying consortia to add any other co-applicant with relevance to the call topic scope.

Moreover, according to the topic texts, proposals should include consortia with strong representation from institutions and researchers across sub-Saharan African countries, demonstrating a broad regional distribution in the SSA region, including involvement of new institutions and Franco/Lusophone countries, and considering previous EDCTP1 and EDCTP2 investments and the current Global Health EDCTP3 call. Applicants are also reminded of the expectation of reaching out to organisations in countries with high burden of disease with relatively lower research capacities, for which appropriate funding allocations should be proposed. Collaboration with other international research groups with relevant experience and participation in networking and joint activities, as relevant, is strongly encouraged. Please consult the topic text for more details.

1.14 Can a researcher from a country which has won the grant before, join another team, as a team member, applying from another country?

The question seems to refer to the case where the researcher changes organisation/employer. This is possible, however, please be mindful about the rules on eligibility for funding that apply to the new organisation involved.

1.15 Is it advised to have more than one European partner? Although only one is necessary to meet consortium requirements, would a proposal with more than one European partner be considered as stronger?

The consortium should include:

- At least three legal entities independent from each other and each established in a different country, where legal entities are eligible to receive funding;
- At least one independent legal entity established in a European Union Member State, or in an associated country to Horizon Europe that is a member of the EDCTP Association; and
- At least one independent legal entity established in a sub-Saharan African country that is a member of the EDCTP Association.

If admissible and eligible, the proposals will be evaluated and ranked against the following award criteria: impact, excellence and quality and efficiency of the implementation. The

existence of an additional European partner does not by itself makes the proposal stronger. It is the consortium's expertise that is evaluated as part of the "quality and efficiency of implementation" criterion.

1.16 Can consortium partners who are neither established in EDCTP Association member countries nor in Horizon Europe Associated Countries commit co-funding?

If such entities are also not established in a European Union Member State, they should bring their own funding in the proposed project as they are not eligible for JU funding. Therefore, in this situation it is not only possible but required for these consortium partners to commit co-funding.

1.17 Are overheads (for shared services like HR, legal, IT) incurred by global organisations across their different locations to support their eligible country offices eligible for funding or can we only include the cost incurred locally?

That depends:

1. If the global organisation and the country offices are different organisations (i.e eligible country office has a legal personality on its own which gives access to the grant) then no, since both can be considered as different entities towards the grant agreement and only the local office can claim the costs incurred by themselves.
2. If the costs incurred by the shared services can be tracked to the action (i.e timesheets on internally invoices goods and services scheme) for the time really spent in the action then they can be considered as direct costs provided the usual accounting practices allows the allocation of those costs to different actions/projects, this should be established already regardless of the awarding of the action. If this is not possible then those overheads can be covered by the indirect costs flat rate offered by the grant, provided the general conditions for flat-rate costs to be eligible are fulfilled.

1.18 For how many years would the funding be provided for?

The project duration cannot be beyond the time frame of the Global Health EDCTP3 programme, which is 2031. The total indicative JU budget for the relevant topic should be also taken into consideration by applicant consortia.

1.19 In the first-stage submission, a consortium should be already formed or this can be done if the proposal gets to second-stage?

The consortium should be in place already for the first stage submission. Notwithstanding, changes in consortium composition (including the coordinator) are allowed between stage 1 and stage 2 submission. However, the full proposal submitted to stage 2 must be consistent with the outline proposal submitted to stage 1 and may not differ substantially (i.e. obvious change concerning a substantial part of the proposed project) — otherwise it will be inadmissible.

1.20 Where can I find the link to download the application template for preparation before online submission?

The template can be found [here](#). After selection of the topic, you would like to apply to, you will find a link to download the application template of chosen topic. Please note that the templates used for Research and Innovation Actions (RIAs) is different from that of Coordination and Support Actions (CSAs).

1.21 Is cost share a requirement for the proposal applications? Is there an indirect cost rate limit?

An estimate of costs for each beneficiary and for each budget category (or work package in case of lump sum calls) will be part of the proposal. The funding rate for Global Health EDCTP3 grants is 100%. For the indirect costs, there is a flat rate of 25% of the eligible personnel and purchase costs.

1.22 Is Morocco or Egypt eligible for funding? Is Morocco or Egypt considered an associated country?

Neither Morocco nor Egypt is not yet associated to the Horizon Europe Programme. However, entities based in Morocco or Egypt are treated as if Morocco/Egypt was associated to Horizon Europe at the level of proposal submission (transitional arrangements). This means that these entities are provisionally considered eligible for funding, which has implications in terms of budget requested and consortium composition eligibility.

The situation is re-evaluated during grant agreement preparation, taking into account the status of the association agreement between the European Union and Morocco/Egypt.

In particular, entities based in Morocco or Egypt would be treated as potential beneficiaries during the process of proposals' eligibility and admissibility checks, and evaluation. In case Morocco or Egypt is not associated at a mature stage of the grant agreement preparation, the status of the entities based in Morocco or Egypt as beneficiaries will be revised; they may still participate in projects as associated partners (not eligible for funding). Where relevant, the consortium may have to change its coordinator and add a participant based in the EU or a country associated to Horizon Europe that is a member of the EDCTP Association to fulfil the consortium composition requirements. Therefore, the situation of entities established in Morocco and Egypt will be reassessed during grant agreement preparation and at the moment of grant agreement signature.

Grant agreements with beneficiaries established in Morocco or Egypt can only be signed if the association of the country to Horizon Europe has started producing legal effects, i.e. the association agreement has started to apply.

Consequently, applicants established in Morocco or in Egypt will be treated for such award procedures as entities established in an associated country, subject to their association agreement to Horizon Europe being applicable at the time of signature of the grant agreement.

We therefore recommend that any consortium applying with entities based in Morocco or Egypt makes sure to have a back-up plan, in case Morocco/Egypt is not associated to Horizon Europe later in 2026.

1.23 Can a private company be a partner and eligible for funding?

Yes, to be eligible for funding, the company must be established in a European Union Member State or a country associated to Horizon Europe, or a EDCTP Association member country.

1.24 How does a country become a member of the EDCTP Association? What is the process?

Please check out the membership section of the EDCTP Association website (<https://www.edctp.org/about-us/governance/general-assembly/membership-of-the-edctp-association/>) for further information on becoming a member.

1.25 If a consortium has two companies (including lead member) from same African country and two companies from same European country, i.e. four partners from two countries, is this consortium eligible?

The consortium should include:

- At least three legal entities independent from each other and each established in a different country, where legal entities are eligible to receive funding;
- At least one independent legal entity established in a European Union Member State, or in an associated country to Horizon Europe that is a member of the EDCTP Association; and
- At least one independent legal entity established in a sub-Saharan African country that is a member of the EDCTP Association.

The consortium in question would lack eligibility based on the first condition to have at least three legal entities each established in a different country.

1.26 Could you please clarify how the budget of a project can be managed in the consortium?

The project budget has to be managed taking into account the general cost eligibility conditions outlined in the grant agreement. According to the grant agreement, the coordinator distributes the payments received from the granting authority to the other beneficiaries without unjustified delay.

1.27 What is the difference between the indicative budget and the expected project budget?

Indicative budget refers to the total indicative Joint Undertaking budget for a specific topic, covering all proposals chosen.

Expected Joint Undertaking contribution is the Global Health EDCTP3's estimated amount that would allow the outcomes of this topic to be addressed appropriately. Nonetheless, this does not preclude submission and selection of a proposal requesting different amounts.

1.28 Can we have a partner from India? Would the grant be split to all partners? How does it work?

Organisations based in India may participate as associated partners, which are not eligible for funding.

The grant is paid to the coordinator, who then distributes the respective share to each beneficiary eligible for funding.

1.29 Can an African firm be part of a consortium since it is tagged as an associated partner?

An organisation established in an African country which is a member of the EDCTP Association is eligible to participate as a beneficiary (and therefore request funding). If it is established in a country that is not a member of the EDCTP Association, it may participate as associated partner (and therefore without JU funding).

1.30 Can an early career researcher lead in the consortium probably because other eligible entities are not in eligible project country?

This matter is something to be discussed at a consortium level. There are no requirements on the seniority of the researcher leading the consortium stipulated in the call text and it is at the discretion of the consortium to assign appropriately experienced individuals to perform the role.

Note that the award criteria against which proposals are evaluated are: scientific excellence, impact and quality and efficiency of implementation. Expertise is part of the valuation of the "quality and efficiency of implementation" criterion (please see General Annexes of the Horizon Europe Programme).

Please also note that it should be the legal entity of the early career researcher that participates as, in Global Health EDCTP3 projects, legal entities (and not individual researchers) form the consortia.

1.31 Are there calls under Lump Sum form? Please confirm that for direct Lump Sum costs, no invoices need to be demonstrated.

The CSAs are lump sum calls. As such, the invoices will not be requested by Global Health EDCTP3 but are essential for the financial management within the beneficiary organisation

1.32 In lump sum calls, apart from not having financial reporting obligation, has anything changed with respect to depreciation costs?

The equipment costs should still follow the eligibility conditions. For Global Health EDCTP3 projects, only the applicable depreciation costs are considered eligible.

1.33 Some countries are listed in Annex 4.2 IKA plan of the Work Programme 2026. Are these the countries that are expected to provide the co-funding or are associated countries (not beneficiaries) being looked for here to join the consortium as contributing partners?

Annex 4.2 does not relate to calls for proposals but is a list of the value of the additional activities which are planned to be initiated in year 2026 by the constituent countries, members of the EDCTP Association. These additional activities are different and separate from the proposals which will be submitted in response to the calls.

It is important to note that a public entity cannot be a contributing partner, unless it is linked to a country that is not a member of the EDCTP Association. In cases where it is linked to a country that is a member of the EDCTP Association, this entity cannot be considered as contributing partner.

1.34 We are planning to submit a proposal to a two-stage EDCTP call. Is it possible to modify or add partners between the first and second submission stages?

Changes in consortium composition (including the coordinator) are allowed between stage 1 and stage 2 submission. However, the full proposal submitted to stage 2 must be consistent with the outline proposal submitted to stage 1 and may not differ substantially (i.e. obvious change concerning a substantial part of the proposed project) — otherwise it will be inadmissible. The aim of this rule is to ensure fair and equal treatment of competing proposals. It should prevent applicants from deliberately setting out false promises in the first stage that are not reflected in their second stage proposals. The evaluation of full proposals during Stage 2 is independent from the evaluation of the outline proposals submitted to Stage 1. At Stage 2, all three award criteria are evaluated for every full proposal submitted.

1.35 As mentioned in the Work Programme 2026, "entities established in low- and middle-income countries that are not members of the EDCTP Association and listed in the Horizon Europe List of Participating Countries on the Funding & Tenders Portal are not eligible for funding unless the specific country in which the entity is established, is associated to Horizon Europe or if the participation of the entity is considered essential for implementing the action by the granting authority". We wonder if an entity based in Central African Republic will be eligible for funding in case it applies for EDCTP3 calls as a partner?

The Central African Republic is not a member of the EDCTP Association. The entity based in the Central African Republic can be an associated partner in a project, but to be automatically eligible for funding, the Central African Republic must be a member of the EDCTP Association at the time of signature of the grant agreement. It may also be eligible for funding if considered essential for implementing the action by the granting authority, however this assessment is in

principle based on the recommendations of independent experts and is therefore performed during the evaluation phase.

1.36 We wonder if in case our Institute is a partner, we could benefit from funding as our participation will be considered essential for implementing the action (as mentioned in the Work Programme)?

In case your entity is not based in a country that is eligible for funding, it may be eligible for funding if their participation is considered essential for implementing the action by the granting authority. The “essentiality” of an entity is assessed by the independent experts during the evaluation and decided by the granting authority. Participation should be considered essential for carrying out the action if there are clear benefits for the consortium, such as outstanding competence/expertise, access to research infrastructure, access to particular geographical environments, access to data, etc. Note that this assessment is in principle based on the recommendations of independent experts and is therefore, performed during the evaluation phase.

2. Global Collaboration Actions

2.1 It is noted that the RIA calls of the Work Programme 2026 require in kind or financial contribution from contributing partners at the level of the proposal. Do you have some extra information about this? Are contributing partners identified or the applicant consortia should seek on their own?

For the RIA actions of the Work Programme 2026, it is expected that the requested funding from Global Health EDCTP3 would be matched equally or with greater financial and/or in-kind contribution from partners. The contributions can consist of financial contributions and/or in-kind contributions. This is not an eligibility requirement, which means that it does not preclude submission and selection of a proposal with a different contribution profile.

Global Health EDCTP3 contributing partners can be a country, an international organisation or any public or private legal entity, other than the Global Health EDCTP3 members or their constituent or affiliated entities (please consult the [Guide for contributing partners](#)).

In case of in-kind contribution (even combined with financial contribution), contributing partners become a part of the applicant consortium and participate in the project, as appropriate i.e. as beneficiaries or affiliated entities in the meaning of Article 8 of the Horizon Europe model grant agreement.

Both for stage 1 (short) proposals and stage 2 (full) proposals, proposals should define the activities of their project in its entirety, including details of the component(s) for which Global Health EDCTP3 funding is requested as well as the component(s) that are to be financed by contributing partners. Each contribution should be well described and budgeted in each proposal, so that the activities and related costs that are covered by the in-kind or financial contribution(s) are clearly identified.

For the first stage evaluation, the proposals will be evaluated and ranked against the following award criteria in General Annex D (see annexes to the call in F&T portal). While not an eligibility criterion, additional activities (as financed by contributing partner) may have a favorable effect on the

evaluation. For the second-stage evaluations, the evaluation of the proposals will be done against the award criteria included in General Annex D, and additionally, the following aspects of “Impact” and Quality and efficiency of the implementation” criteria:

(1) for the ‘impact’ criterion: “production of meaningful and significant effects enhancing the impact of the relevant research activities via the inclusion of effective in-kind and/or financial contribution of contributing partners”;

(2) for the ‘quality and efficiency of the implementation’ criterion: “leveraging of financial and/or in-kind contributions from contributing partners that are equal or greater than the requested JU contribution, in order to ensure the necessary resources and effort for the action”.

As explained in the Work Programme 2026, note that for the second stage, the applicants’ contributing partner(s) must submit the endorsement letter for approval by the Global Health EDCTP3 Governing Board before the deadline for submission of the second-stage applications. It is recommended that the draft letter is submitted to the Global Health EDCTP3 Programme Office sufficiently ahead of deadline for submission of proposals to allow the review.

The contributing partners are not identified in the topic texts. It is for the applicant consortia to seek these partners. On top of what has been mentioned in the call/topic text, more information about contributing partners can be found on our website, specifically on this [page](#).

2.1 It is noted that RIA calls of the Work Programme 2026 require in kind or financial contributions from contributing partners at the level of the proposal. Should the letter of endorsement by a contributing partner be sent and approved before the first-stage submission, or only at the second stage?

As explained in the Work Programme 2026, the applicants’ contributing partner(s) must submit the endorsement letter for approval by the Global Health EDCTP3 Governing Board before the deadline for submission of the second-stage applications. Therefore, this is not required for the first-stage submission. It is recommended that the draft letter is submitted to the Global Health EDCTP3 Programme Office well in advance of the second-stage submission deadline to allow sufficient time for review.

2.2 If wishing to apply to a topic that is a Global Collaboration Action, what is the expected amount from contributing partners to a given consortium?

It is expected that the requested funding from Global Health EDCTP3 would be matched equally or with greater financial and/or in-kind contribution from partners. The contributions can consist of financial contributions and/or in-kind contributions.

The level of contribution by the contributing partner(s) mentioned in the call text is not an eligibility requirement, which means that it does not preclude submission and selection of a proposal with a different contribution profile.

For the first stage evaluation, the proposals will be evaluated and ranked against the award criteria in General Annex D (see annexes to the call in F&T portal). While not an eligibility criterion,

additional activities (as financed by contributing partners) may have a favourable effect on the evaluation.

For the second-stage evaluations, the evaluation of the proposals will be done against the award criteria included in General Annex D, and additionally, the following aspects of “Impact” and “Quality and efficiency of the implementation” criteria: (1) for the ‘impact’ criterion: “production of meaningful and significant effects enhancing the impact of the relevant research activities via the inclusion of effective in-kind and/or financial contribution of contributing partners”; (2) for the ‘quality and efficiency of the implementation’ criterion: “leveraging of financial and/or in-kind contributions from contributing partners that are equal or greater than the requested JU contribution, in order to ensure the necessary resources and effort for the action”.

2.3 Is the call generally on collaboration or can a single institute send a proposal?

An organisation cannot submit a proposal on its own, it must be part of a consortium. For consortium composition, see replies to relevant questions above, as outlined in section 4.1.2.4 (Specific conditions to Global Health EDCTP3) of the Global Health EDCTP3 Work Programme 2026.

2.4 Is there any guidance or a template for the Letter of Endorsement?

Yes, on the Global Health EDCTP3 website: https://www.global-health-edctp3.europa.eu/about-us/partner-us_en. It is recommended that the draft letter is submitted to the Global Health EDCTP3 Programme Office well in advance of the second-stage proposal submission deadline to allow sufficient time for review.

2.5 How can contributing partners be contacted? How applicants know who they are?

A contributing partner can be based in any country, it can be an international organisation or legal entity, other than a member of the Joint Undertaking, that supports the objectives of the programme. In the case of a contributing partner being a government/public body, it should be based in a country that is not a member of the EDCTP Association.

2.6 Can you confirm that contributing partners refer exclusively to funding in cash or in-kind from an external third party and not to co-funding from consortium partners?

In case of in-kind contribution (even combined with financial contribution), contributing partners become a part of the applicant consortium and participate in the project, as appropriate i.e. as beneficiaries or affiliated entities in the meaning of Article 8 of the Horizon Europe model grant agreement.

In case of only financial contribution, the contributing partner should not necessarily be part of the consortium; however, in case the proposal is successful, under a funding agreement between the contributing partner and Global Health EDCTP3, the contributing partner transfers the financial contribution (cash, in EUR) to beneficiaries that are party to a grant agreement signed with Global Health EDCTP3 under a specific work programme topic.

2.7 It was mentioned that a contributing partner could not be an organisation in an EDCTP Association member state - how is this possible since all the consortium partners would be established in EDCTP Association member countries?

A contributing partner should not be a public organisation established in a country that is member of the EDCTP Association. It may however be a private organisation based in an EDCTP Association member country.

In principle, any legal entity, regardless of its place of establishment, including legal entities from third countries non-associated to Horizon Europe or international organisations, is **eligible to participate** (whether it is eligible for funding or not)².

Furthermore, in case the contributing partners also requests funding, legal entities must be established not only in a country that is member of the EDCTP Association but also in one of the Member States of the European Union, or in a country associated to Horizon Europe.

Please see above answer to question 1.2.

3. Lump sum actions (CSAs)

3.1 Where can the applicants find more information on lump sum grants?

Please find below some relevant documentation:

- Lump sum funding : [What do I need to know](#)
- Detailed guidance for participants : [how-to-manage-your-lump-sum-grants_en.pdf](#)

Applicants can also consult the frequently asked questions of the [EU Funding & Tenders Portal](#)

3.2 What happens if one of the participating entities doesn't have an allocated budget even though it has tasks assigned in the work packages?

The budget presented in the proposal should be taken into account in the evaluation as covering the full tasks (in some cases some tasks are funded by the beneficiary itself or a contributing partner but this should be indicated in the proposal). It is not possible to increase the requested funding.

3.3 At the end of the project itself, must the consortium provide a financial report which will allow some control on how the money was actually spent?

² Provided that the conditions laid down in the Horizon Europe Regulation have been met, along with any other conditions laid down in the specific call topic. Please also note that the General Annexes of the Horizon Europe Work programme also establishes exceptions for example for entities established in Russia or Belarus.

For lump sum projects, there will be no financial reporting, but only release of lump sum shares per beneficiary and WP, based on the completed work packages and assessment done by the Joint Undertaking. There is, therefore, only focus on the scientific-technical content of projects.

In accordance with the HE lump sum model grant agreement (Article 25), the granting authority, during the action or afterwards, may carry out internal checks, reviews and audits on the proper implementation of the action and compliance with the obligations under the Agreement. Consequently, checks, ex-post audits or reviews are still possible, as far as horizontal obligations and technical project implementation is concerned.

Please also consider Article 20 of the HE lump sum model grant agreement about Record Keeping “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.”

For example, for research activities, beneficiaries should keep documentation as required by good research practices such as lab books, technical documents, prototypes, proceedings in conferences, and publications.