



European
Commission

MID-TERM REVIEW MEETING

HiggsTools

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Outline

PART I

What is REA?

Why a Mid-Term Review Meeting?

What are the obligations of the Network?

What defines a successful project?

What covers the EU contribution?

PART II

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Resources



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What is REA?

Research Executive Agency

Funding body created by the European Commission to foster **excellence in research and innovation**

- Set up in 2007, located in Brussels
- autonomous since June 2009
- mandate extended in 2014.

REA manages

- large parts of **FP7**
 - € 6.4 billion (12% of FP7 budget)
 - Ca 11000 research projects
- larger share of **Horizon 2020**

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Agency

REA and Horizon 2020

❖ Excellent science :

- **Marie Skłodowska-Curie Actions**
- **Future and Emerging Technologies / FET-Open**

❖ Industrial Leadership :

- **Space Research**

❖ Societal challenges :

- **Food Security, Sustainable Agriculture and Forestry, Marine, Maritime and Inland Water Research and the Bioeconomy**
- **Innovative, Inclusive and Reflective Societies**
- **Secure Societies**

❖ Cross-cutting themes :

- **Spreading Excellence and Widening Participation**
- **Science with and for Society**

+ support services for the whole H2020 program.



Why a Mid-Term Review Meeting?

A contractual obligation (M18-22)

A constructive dialogue between the network participants and the REA:

- To present progress and achievements
- To discuss openly potential problems
- To clarify pending issues

Not just an evaluation of S&T, but also an evaluation of training, networking, management, legal and financial issues as well as possible individual issues.

External expert today :

Pr. Paula EEROLA





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Obligations of the Network

- Carry out the work, efficiently and timely, as described in **Annex I**
- Select fellows according to the specific eligibility criteria relative to the scheme (ITN/IAPP/EID/EJD).
- Execute, by due dates, all payments to the researchers (respecting Marie Curie rates)
- Provide reasonable assistance to the fellows in all administrative procedures
- Provide all needed infrastructures & conditions for the successful completion of the project
- Provide information to REA and Court of Auditors up to 5 years after the project completion.



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A successful project...

- Keeps a high profile in S&T
- Fosters publication in highly ranked journals and favours Fellow's awards
- Has a positive impact on researchers' career
- Fosters lasting collaborations
- Generates significant outreach activities
- Has a positive impact on citizens and/or society
- Creates or renew interest in the public
- Contributes to bringing new products to the market
- Develops an entrepreneurial culture
- Promotes rights of researchers (e.g. gender balance, equal opportunities...)

EU contribution – budget categories

Paid to the fellows (incl. Taxes & social protection)		For all activities carried out by the institutions		
Living allowance	Mobility allowance	Contribution to research, training & transfer of knowledge	Management	Contribution to overheads

Monthly Marie Curie rates per cost category (WP 2013)

ESR : € 3167*ccc*ctc ER : € 4875*ccc*ctc MER : € 7292*ccc*ctc	€ 700-1000 *ccc depending on family charges	€ 1800	Up to 10% of total EU contribution	10% of direct costs
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ctc : contract type coefficient (0.5 for stipend / 1 for employment contract)

ccc : country correction coefficient

Monthly Living & Mobility allowances for type A contracts

Country of beneficiary	Gross Monthly living allowance (ESR)	Monthly mobility allowance w/o family		Monthly mobility allowance w family
Germany	€ 3002	€ 664	↔	€ 948
France	€ 3677	€ 813	↔	€ 1161
Greece	€ 3002	€ 664	↔	€ 948
Italy	€ 3376	€ 746	↔	€ 1066
Netherlands	€ 3297	€ 729	↔	€ 1041
Poland	€ 2442	€ 540	↔	€ 771
Spain	€ 3094	€ 684	↔	€ 977
Switzerland	€ 3787	€ 837	↔	€ 1196
United Kingdom	€ 4256	€ 941	↔	€ 1344

Contribution to Research/Training/ToK

Flat rate (depending exclusively on person months enrolled by the beneficiary) covering

- *Publication of vacant positions*
- *Travel costs for interviews (for all invited candidates, not only for fellows)*
- *Conference fees, training costs and share on participation to internal workshops*
- *Travel of fellow to workshops, trainings, conferences and place of secondment*
- *Direct research cost (e.g Instrument / Measurement time)*
- *Personnel costs for coordination of R&D activities at consortium level*
- *Publication fees*

No need to document or justify its use, but proof of expenditures need to be kept in case of financial or technical Audit (up to 5 years after project's end)

Management costs *will be discussed extensively in Part II*



Recommendation for the fellows presentations

Please do not forget to mention in your presentation

- **your ESR #**
- **the name of your institution**
- **the name of the scientist in charge following your work**

...for an easier follow-up of your work initially defined in Annex1

PART II

Recommendations for the preparation of the first periodic report
Management costs claim
Resources

Recommendations for preparation of first periodic report (1/2)

First Periodic report due 60 days after Mid-Term (usually end of M26)

Use attachments to the periodic report to document achieved **milestones** and **deliverables**

- Each document should be properly prefixed with the identification number given in Annex I (e.g. Mx.y / Dy.z)
- All deviations in delivery or achievement of milestones (compared to Annex I) should be convincingly discussed in the periodic report.

Recommendations for preparation of first periodic report (2/2)

Beneficiaries should verify the consistency between

- starting dates and duration indicated in Declaration on the Conformity and
- the duration claimed for living and mobility allowances in the "Use of Resources" compiled when submitting the Forms C.

Coordinator should check the consistency between

- Full-time equivalent person-months in the recruitment table and
- Duration of recruitment within the reporting period in the summary for researchers

In case of rounding differences, to enter a more precise work duration in the recruitment table, please select "other" instead of "Full time" in the "Working Time Commitment" column and adjust the exact number of worked month in the "full-time equivalent person months" column.

Management costs claim

Management costs is the only real costs category – It might cover up to 10% of accepted costs

- Costs claimed should be sufficiently detailed in the Use of Resources submitted together with Form Cs
- A management breakdown table will otherwise be requested and might delay the payment **for all beneficiaries**

Management costs are divided in 2 subcategories

- Direct costs
- Subcontracting

Management costs claim – DIRECT COSTS

Personnel costs for project management/administrative activities:

- preparation of reports (declarations of conformity, progress reports, mid-term report, periodic reports and final report)
- organisation of management meetings, preparation of travels, administrative project assistance to other beneficiaries (coordinator)
- management of the recruitment/interview process.
- website design and maintenance (when carried out internally)

Please detail number of worked hours and hourly rate for each participant – include surnames.

NB1: scientific coordination or fellows supervision costs cannot be charged in this category.

NB2: publication of the posts, visa costs, candidates travel costs incurred for interviews do not belong to this category, but to category 3 (training).

Travel to management meetings (Kick-off, Supervisory board meetings).

NB: if a management meeting is combined with a network event (scientific training, workshop, conference), the costs should be divided proportionally between category 3 (training) and the management category 4 (management).

Management costs claim – DIRECT COSTS (continued)

Travel to Mid-term review meeting (for all persons, including fellows)

Expenses related to organisation of management meetings (Kick-off, Supervisory board meetings, Mid-term review meeting, Ethical Board meetings)

NB : at the exception of room fees and catering if subcontracted.

Other costs related to administration of the project (e.g. bank transfer costs related to the distribution of pre-financing)

NB: other bank transfer costs are to be covered by overheads.

*Costs related to the **consortium agreement.***

Management costs claim SUBCONTRACTING

- *Certificate on financial statements*
- *Website design and maintenance (if externalized)*
- *Fee for an external meeting room and catering for management related events*
- ...

NB: The amounts given must be claimed without VAT.

Management costs claim

Examples of ineligible costs

- *Coordination of RTD activities.*
- *Dissemination activities.*
- *Costs related to the execution of the training/partnership project and coordination between beneficiaries (e.g. publication of vacant positions, travel costs to interviews, training actions and conferences/workshops, network meetings).
These should be covered by category 3.*
- *VAT*

Recommendations for preparation of first periodic report : a summary

Verify consistency of Declaration on Conformity with claimed months for living and mobility allowances – If necessary request REA to reject the DoCs

Document clearly the achieved milestones and deliverables. Separate them clearly in the periodic report. Comment on unachieved ones in the text of the periodic report.

Fill in with sufficient detail the Use of Resources

- *Indicate fellows name and period (start date – end of period date)*
- *Detail management cost breakdown*
 - *including name, #hours and hourly rate for personnel cost*
 - *Nature of other claimed expenses.*

Supply all ethical approvals (when applicable)

All clarification requests from REA will delay the payment to the consortium.

Resources

Marie Curie Actions website

<http://ec.europa.eu/research/mariecurieactions>

Euraxess Portal

<http://ec.europa.eu/euraxess>

FP7 Participant Portal website

<http://ec.europa.eu/research/participants/portal>

Register as an expert

<http://ec.europa.eu/research/participants/portal/desktop/en/experts>

Research Enquiry Service

<http://ec.europa.eu/research/enquiries>

Marie Curie Alumni Platform

<https://www.mariecuriealumni.eu/about-us>

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