



# Workshop Horizonte Europa Financiamento Lump Sum

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Alexandre Marques

17 mar 2026

# Agenda



## Workshop Horizonte Europa: Financiamento Lump Sum

17 de Março de 2026

ANI Rua Carlos Alves, 7, Lisboa

11:00 - 11:05	<b>Abertura (ANI)</b>
11:05 - 11:35	<b>Financiamento lump sum - preenchimento da parte B</b> Design e estrutura dos Work Packages, distribuição por parceiros <b>Flávio Soares (ANI)</b>
11:35 - 12:30	<b>Financiamento lump Sum - orçamentação e preenchimento tabela excel</b> Tabela de orçamento, custos elegíveis; períodos de reporte <b>Alexandre Marques (ANI)</b>
12:30 - 13:00	Questões & Respostas
13:00 - 14:00	Pausa para almoço
14:00 - 14:30	<b>Avaliação, gestão de projeto e implementação</b> Avaliação, GAP, Consortium Agreement, pagamentos e reporte técnico <b>Alexandre Marques e Pedro Miranda (ANI)</b>
14:30 - 16:00	<b>Avaliação e implementação de um projeto lump sum – Partilha de experiencia</b> <b>Miguel Vicente</b> Coordenador projeto MEGA WAVE PTO, WAVEC <b>Luis Amaral</b> Coordenador projeto Mission, WAVEC
	Questões & Respostas
16:00	Coffee Break e Encerramento



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# Lump Sum framework



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# Horizon Europe – Legal Basis

Financial  
Regulation

- Legal basis to european funding

Horizon Europe – Rules  
for participation

Work Programme

Model Grant  
Agreement

- Corporate Approach – Same model for all programmes managed centrally by EC



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# Lump sums: How did we get there?

2015

- EU initiative designed to maximize the EU's investments in support of growth, jobs and stability in Europe and beyond.
- „EU Budget should be focused on results”

2017

- Pascal Lamy, Lab-Fab-App report: “applicants should be given the choice cost-based or lump-sum funding for their project, with payment against fulfilment of activities”

2018-20

- Pilot phase of Lump-sum Option 1 and Lump-sum Option 2
- So far about 600 LS projects, but <50 RIA/IA, not many fully completed

2021

- Evaluation of Lump Sum Pilot by European Commission
- “lump sum funding is **fit for all** types of organisation and types of grant”

2022

- Study of LS by European Parliament
- “implementing LS in a hybrid funding scheme where **certain WPs or actions** are LS-funded”

2022

- IGLO report on first experiences with LS
- „it is still **too early for a final assessment** of the LS approach“

# Lump Sum Rationale

Dragui Report - The future of European competitiveness

Letta Report - Much more than a market (April 2024)

Heitor Report - Align, Act, Accelerate



Simplification



Simplified Cost options – Lump Sum Financing

December 2024, [Valdis Dombrovskis](#) is the European Commissioner for Economy and Productivity, as well as **Implementation and Simplification**



# Lump Sum Rationale

Financial regulation (Regulation (EU, Euratom) 2024/2509)

Preamble

(56) More emphasis should be put **on performance and results of projects financed from the budget.** It is thus appropriate to define an additional form of financing not linked to costs of the relevant operations in addition to the forms of Union contribution already well established (reimbursement of the eligible costs actually incurred, unit cost, **lump sums** and flat-rate financing). The additional form of financing should be based on the fulfilment of certain conditions ex ante or on the achievement of results measured by reference to previously set milestones or through performance indicators.

## Article 181 Lump sums, unit costs and flat-rate financing

1. Where the grant takes the form of lump sums, unit costs or flat-rate financing as referred to in point (c), (d) or (e) of the first subparagraph of Article 125(1), this Title shall apply, with the exception of the provisions or parts of the provisions related to the verification of eligible costs actually incurred.

....



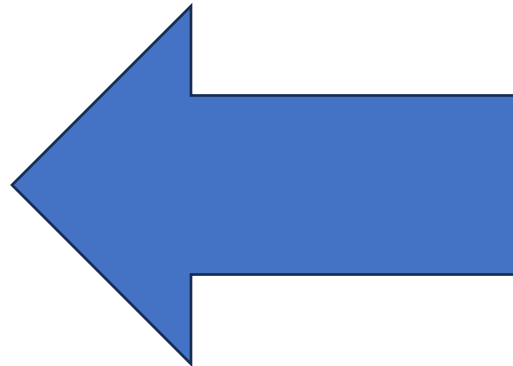
# Types of funding

Actual costs

Unit Costs

Lump Sum

Flat rate



Other types of funding:

- Reimbursable advance
- Equity/Blended Finance
- Prémios



# Lump Sum options in Horizon Europe

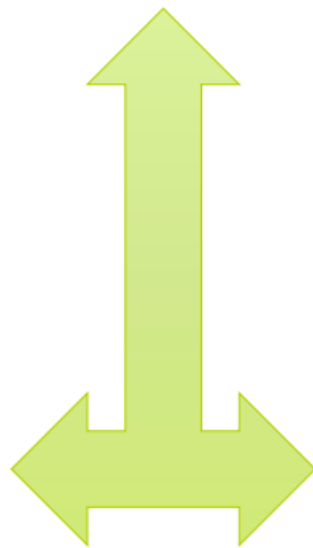
## Two lump sum options

Type 1

Lump sum  
fixed in the call  
for proposal

Type 2

You define the  
lump sum in  
your proposal





# Financiamento Lump Sum

Parte B : Design e estrutura dos Work Packages,  
distribuição por parceiros

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Flávio Soares

17 mar 2026

# Why is the Commission using Lump Sum funding?

## Reducing the financial error rate

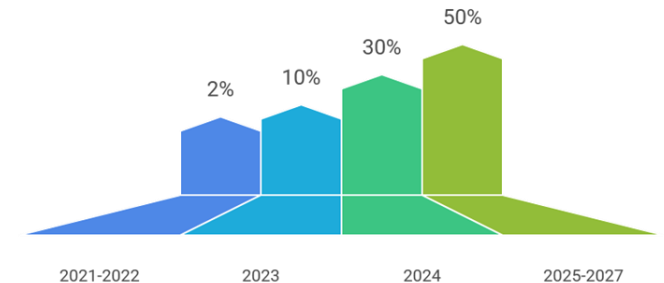
- Lump sums are a key measure to achieve this in Horizon Europe

## Significant simplification potential

- Funding based on reimbursement of real costs remains complex and error-prone.
- Lump sums remove the obligation to report actual costs, reducing administrative burden
- Easier access, especially for small organisations and newcomers

## More focus on content, less on financial management

Roll-out of lump sums



# Basic principles

**Lump sum evaluation and grant agreement follow the standard approach with the same:**

- Evaluation criteria
- Pre-financing and payment scheme
- Reporting periods and technical reporting

## What changes

- **No costs justification at payment stage & No financial ex post audits**
- Payments depend on completion of activities, not on successful outcomes

**Work package completed**  **payment triggered at interim/final report**

# HORIZON EUROPE

## Application Form



The proposal contains **two parts**:

### Part A

Online at the  
Funding & Tenders Portal

- Proposal General Information
- Participants Administrative Details
- Summarized Budget
- Ethics and Security Questionnaires
- Declarations

### Part B

Download  
Complete, and Upload

- Technical Project Description
- Structured in 3 sections
- Aligned with evaluation criteria

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>



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# HORIZON EUROPE

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# Writing a lump sum **proposal**

- Use the standard Horizon Europe application form – Same technical part
  - **+5 pages for RIA & IA (45) and +3 pages for CSA (28)**
  - Use the templates provided in the online Submission System
- Address expected impacts and outcomes as in any Horizon proposal.
- **Describe in detail the activities covered by each work package**

*EC: “The description of activities to be implemented under each WP must be precise enough to enable to assess if a work package is completed or not.”*



A screenshot of the European Commission's online submission system interface. At the top, it features the European Commission logo and the text 'Funding: Submission Service'. Below this, there are several sections: 1. 'Deadline' section with a calendar icon, showing '14 April 2026 17:00:00 Brussels Local Time' and '32 days left until closure'. 2. 'Call data' section containing: 'Call: HORIZON-CL5-2026-05', 'Topic: HORIZON-CL5-2026-05-D5-07', 'Type of action: HORIZON-RIA', and 'Type of MGA: HORIZON-AG-LS'. A yellow warning box below this states: '⚠ Topic and type of action can only be changed by creating a new proposal.' 3. 'Proposal data' section with 'Acronym: Test Lump Sum' and 'Draft ID: SEP-211304622'. 4. A red-bordered box at the bottom containing a 'Download Part B templates' section with a download icon and the text 'Download part B templates'.

# Risk Table is a Critical Tool in Lump Sum Proposals

- **Unfinished activities are inevitable in research**
  - The question is whether they were anticipated
- **Table 3.1e is your consortium's safety net**
  - Risks identified upfront may justify incomplete tasks and protect the lump sum payments

Table 3.1e: Critical risks for implementation #@RSK-MGT-RM@#

Description of risk (indicate level of (i) likelihood, and (ii) severity: Low/Medium/High)	Work package(s) involved	Proposed risk-mitigation measures

**Definition critical risk:**

A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.

**Level of likelihood to occur: Low/medium/high**

The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.

**Level of severity: Low/medium/high**

The relative seriousness of the risk and the significance of its effect.

#RSK-MGT-RM@#



# Updates Application form part B – Implementation in WP 2026-2027

- Table 3.1h ‘Purchase costs’ was simplified and it now only covers equipment costs
- Tables 3.1i ‘Other costs categories’ and 3.1j ‘In-kind contributions’ were removed
  - *For actual costs grants, these tables will be required during GAP as part of the Description of Action*
  - **For Lump sum, if you use any of this costs**, the justifications must now be included in the comments tab (Excel) or comments box (Part A).

**Table 3.1h: ‘Purchase costs’ items (travel and subsistence, major equipment costs and other goods, works and services)**

Please give details of the need for equipment costs, complete the table below for each participant if the purchase costs (i.e. the sum of the costs for ‘travel and subsistence’, ‘equipment’, and ‘other goods, works and services’) exceeds 15% of the personnel costs for that participant (according to the budget table in proposal part A). The record must list cost items in order of costs and starting with the largest cost item, up to the level that the remaining costs are below 15% of personnel costs.

Participant Number/Short Name	Cost (€)	Justification
Travel and subsistence		
Equipment		
Other goods, works and services		
Remaining purchase costs (<15% of pers. costs)		
Total		

A IN

**Table 3.1i: ‘Other costs categories’ items (e.g. internally invoiced goods and services)**

Please complete the table below for each participant that would like to declare costs under other costs categories (e.g. internally invoiced goods and services), irrespective of the percentage of personnel costs.

Participant Number/Short Name	Cost (€)	Justification
Internally invoiced goods and services		

**Table 3.1j: ‘In-kind contributions’ provided by third parties**

Please complete the table below for each participant that will make use of in-kind contributions (non-financial resources made available free of charge by third parties). In-kind contributions provided by third parties free of charge are declared by the participants as eligible direct costs in the corresponding cost category (e.g. personnel costs or purchase costs for equipment).

Participant Number/Short Name	Third party name	Category	Cost (€)	Justification
		Select between Seconded personnel Travel and subsistence Equipment Other goods, works and services Internally invoiced goods and services.		

#SQUA-LIT-QLS# #SWRK-PLA-WPS#



# Work package (WP) distribution



**As many as needed but no more than what is manageable**

- WP = major sub-division of the project work plan



## **Avoid over-fragmenting**

Lump sum funding must not lead to too many small WPs

- A single activity is not a WP
- A single task is not a WP
- A % of progress is not a WP (e.g. 50 % of the tests)
- A lapse of time is generally not a WP (e.g. activities of year 1)

- **Long-duration WPs can be split by reporting period** e.g., Management, Dissemination, Exploitation
- **Why split?** Enables payment of relevant activities at the end of each reporting period

# Splitting work packages - example

## Single long-duration work package

WP no	WP name	YEAR 1												YEAR 2												YEAR 3												YEAR 4											
		Reporting Period (RP) 1												Reporting Period (RP) 2												Reporting Period (RP) 3																							
		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	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48
WP1	Management																																																



## Split work packages, same content

WP no	WP name	YEAR 1												YEAR 2												YEAR 3												YEAR 4											
		Reporting Period (RP) 1												Reporting Period (RP) 2												Reporting Period (RP) 3																							
		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	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48
WP1	Management (RP1)																																																
WP2	Management (RP2)																																																
WP3	Management (RP3)																																																

- Splitting WPs along the boundaries of reporting periods allows activities to be reimbursed at intermediate payments.
- In case the resulting WP have the same tasks, there is no need to repeat the same description for each split work package in the proposal (part B, table 3.1b).

**Splitting WPs is entirely optional. It should be used if needed to optimise the cash flow.**



Lump Sum budgeting  
Eligible Costs  
Excel table  
Reporting periods

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Alexandre Marques

17 mar 2026

# Horizon Europe – Article 6 – Eligible costs → Conditions

(General GA)

**Article 6.1 –annotated grant agreement:** Defines the conditions for eligibility for costs and contributions.

In order for costs and contributions to be eligible, they must:

- Be actually **incurred by the beneficiary**
- Be **incurred in the period** (except the final report)
- Declared under one **the budget categories** ←
- Be incurred in **connection to the action** ad described in annex 1 and **necessary** for its the implementation
- Be **identifiable and verifiable** ✘
- Comply with **national law** on taxes, labor and social security
- Be **reasonable, justified** and comply with the principle of **sound financial management**



# Horizon Europe – Article 6.2 – Eligible costs

<b>General &gt; Article 6 – Eligible costs/contributions</b>	25
<b>General &gt; Article 6.1 General eligibility conditions</b>	25
<b>General &gt; Article 6.1 In-kind contributions for free</b>	30
<b>General &gt; Article 6.2 Specific eligibility conditions</b>	31
<b>General &gt; Article 6.2.A Personnel costs</b>	32
<b>General &gt; Article 6.2.A.1 Employees</b>	33
<b>General &gt; Article 6.2.A.2, A3 Natural persons with direct contract and seconded persons</b>	42
<b>General &gt; Article 6.2.A.4 SME owners and natural person beneficiaries</b>	46
<b>General &gt; Article 6.2.A.5 Volunteers</b>	48
<b>General &gt; Article 6.2.A.X Other personnel costs</b>	50
<b>General &gt; Article 6.2.B Subcontracting costs</b>	54
<b>General &gt; Article 6.2.C Purchase costs</b>	57
<b>General &gt; Article 6.2.C.2 Equipment</b>	63
<b>General &gt; Article 6.2.C.3 Other goods, works and services</b>	70
<b>General &gt; Article 6.2.D Other cost categories</b>	73



# Horizon Europe – Article 6 – Eligible costs → Conditions

(Lump Sum GA)

## 6.1 and 6.2 General and specific eligibility conditions

Lump sum contributions are eligible ('eligible contributions'), if:

(a) they are set out in **Annex 2** and

(b) **the work packages are completed and the work is properly implemented by the beneficiaries and/or the results are achieved**, in accordance with Annex 1 and during in the period set out in Article 4 (with the exception of work/results relating to the submission of the final periodic report, which may be achieved afterwards; see Article 21)

(c) [and if [insert additional eligibility conditions, if any]].

**They will be calculated on the basis of the amounts set out in Annex 2.**



# Horizon Europe – Excel – BE list

List of beneficiaries (BE) and affiliated entities (AE)					
Choose from the dropdown lists the country and funding rate for each beneficiary. Do not modify the predefined values.					
BE/AE nr	Role	BE/AE name	Acronym	Country	Funding rate
BE1	Coordinator	BE1 name	BE1 acronym	Belgium (BE)	100%
BE2	Beneficiary	ANI	ANI	Portugal (PT)	70%
BE3	Beneficiary	XP	XP	Croatia (HR)	100%
BE3-AE4	Affiliated entity	TO	TO	Croatia (HR)	100%

[Add BE](#)

[Delete OLD BEx backup sheets](#)

[Apply changes](#)

lear BE2

Clear BE3

Clear BE3-AE4

Add AE to BE1

Add AE to BE2

Add AE to BE3

00000001-0001-0001-0001-00000000000001

1049d403-a923-4c34-94d0-0018ac6a9e01

18ca6017-0265-4f3b-a46a-393af7f31728



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# Horizon Europe – Excel – WP list

List of Work Packages	
<i>WP number</i>	<i>WP name</i>
WP1	Management 1
WP2	Management 2
WP3	Communication
WP4	Dissemination

[Add WP](#)

*! Double click buttons !*

[Apply changes](#)

Clear WP2

Clear WP3

Clear WP4



# Personnel Costs

## A. PERSONNEL COSTS

A1 Employees (or equivalent)		A4 SME owners and natural person beneficiaries	A6 Personnel unit cost
A2 Natural persons under direct contract			
A3 Seconded persons			
Actual costs	Unit costs (usual accounting practices)	Unit cost	Unit cost

<b>A. DIRECT PERSONNEL COSTS</b>			
<b>A.1 Employees (or equivalent)</b>			
SENIOR SCIENTISTS (or equivalent in the private sector)			0,00
JUNIOR SCIENTISTS (or equivalent in the private sector)			0,00
TECHNICAL PERSONNEL (or equivalent in the private sector)			0,00
ADMINISTRATIVE PERSONNEL (or equivalent in the private sector)			0,00
OTHERS			0,00
<b>A.2 Natural Persons under direct contract</b>			0,00
<b>A.3 Seconded Persons</b>			0,00
<b>A.4 SME owners and natural person beneficiaries</b>		9271,00	0,00



# Horizon Europe – Personnel Costs

Enter your personnel costs in section “A. DIRECT PERSONNEL COSTS”. For personnel costs, the number of items is the number of person-months (e.g. 10 items correspond to 10 person-months).

A senior scientist corresponds to career stages A and B in the Researcher Table in Part A of the proposal, or to an equivalent position in the private sector. A junior scientist corresponds to career stage C and D in the Researcher Table in Part A of the proposal, or to an equivalent position in the private sector.

A staff category can contain more than one employee (e.g. two junior scientists in the same organisation and working on the same work package). In this case, the cost per item is the average monthly personnel cost of all employees concerned, and the number of items is the combined number of person-months. No more detailed information is required in this sheet.

Experts use the Horizon dashboard for lump sum evaluations to help judging if personnel costs in the proposal are reasonable. Personnel costs that lie above the dashboard values can be accepted if they are justified by the proposal. You can compare the personnel costs in your proposal with the values shown in the dashboard. If you have high personnel costs, please justify them in the 'Any comments' tab (e.g. high staff effort, need for senior staff, or high monthly rates).



# Horizon Europe – Personnel Costs – Dashboard

- Evaluation experts must use the dashboard **as an orientation** to ensure that budgets are reasonable and non-excessive.
- For each combination of country and organisation type selected, the dashboard displays the distribution between the 20th and the 80th percentile, and the **median personnel costs**.
- Based on grants signed from 2022 (data last refreshed: 19 Nov 2025).
- **Applicants justify high personnel costs in the ‘comments’ section of the detailed budget table.**



# Horizon Europe – Personnel Costs – Dashboard

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/horizon/lump-sum/dashboard>

Average personnel costs per month - Apply filters to resolve by country and organisation type

Programme Period

Select an organisation type

Portugal

20th Percentile

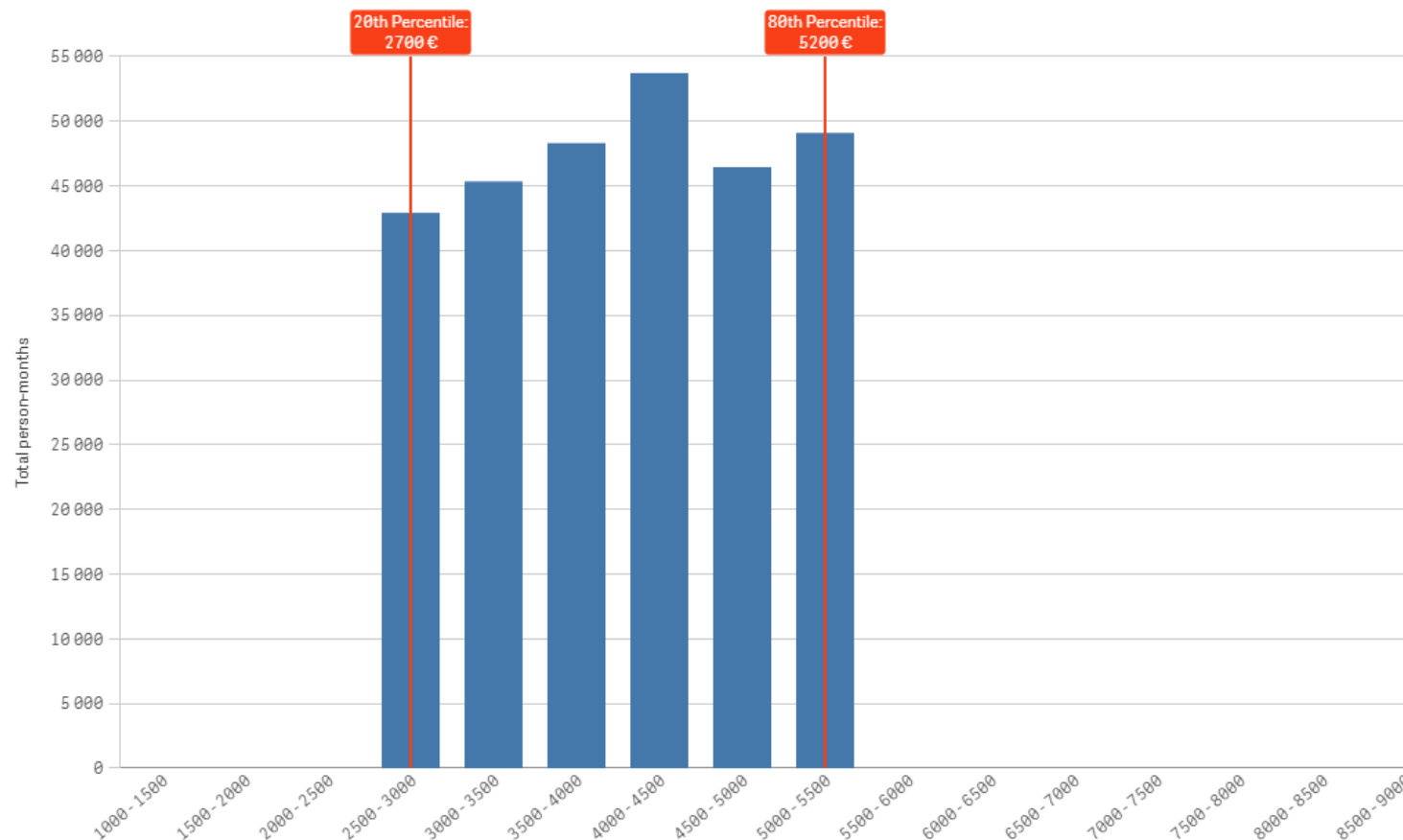
2 700 €

50th Percentile Median

4 000 €

80th Percentile

5 200 €



# Horizon Europe – Personnel Costs – Dashboard

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/horizon/lump-sum/dashboard>

Programme Period

PRC - Private Companies (without SMEs)

Portugal

20th Percentile

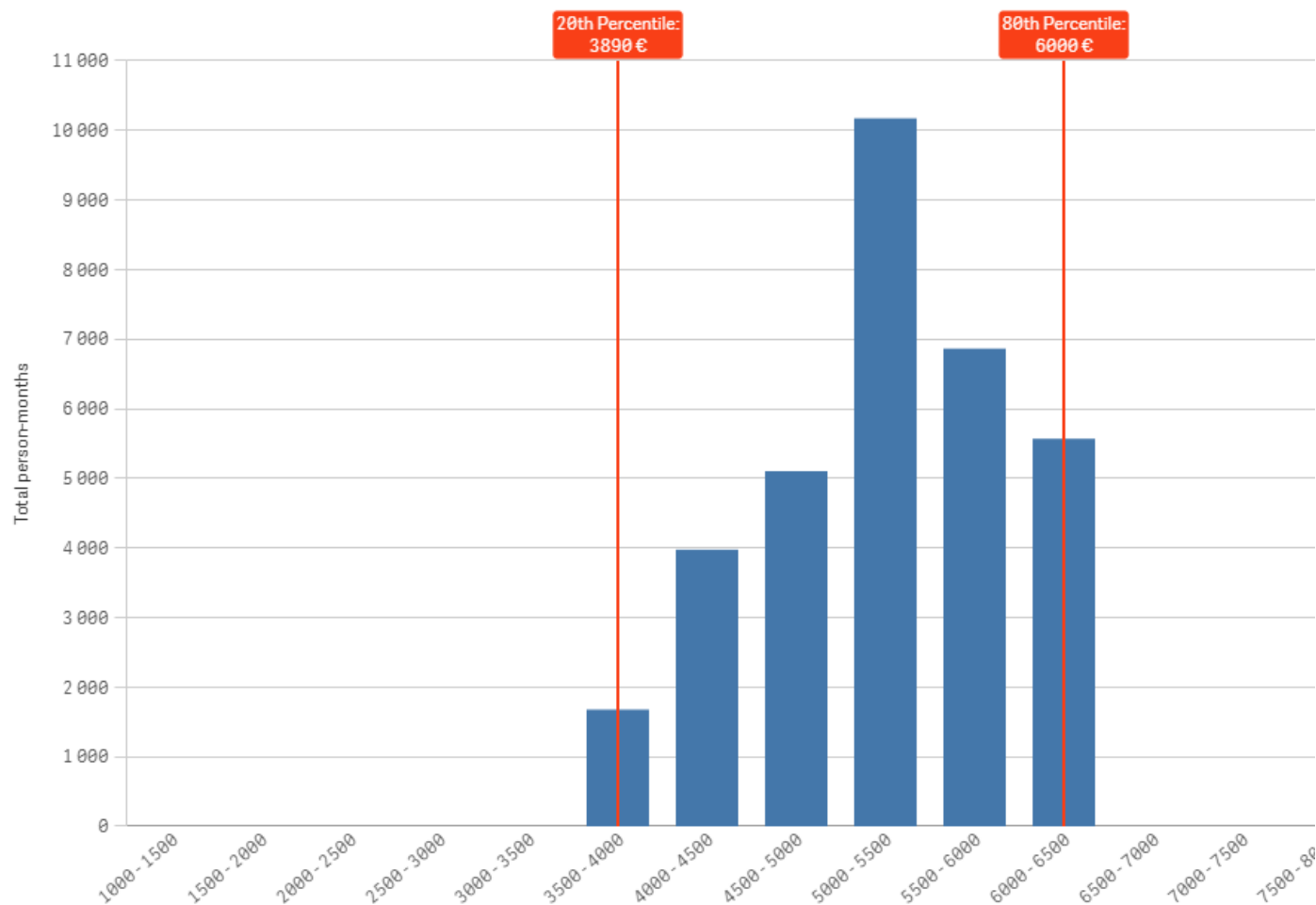
3 890 €

50th Percentile Median

5 000 €

80th Percentile

6 000 €



# Lump sum budget - Direct subcontracting costs + Direct purchase costs

COST CATEGORY	BE1 name		
	UNITS	COST PER UNIT	BE TOTAL COSTS
<b>COSTS WORK PACKAGE 1: WP1 name</b>			
<b>B. DIRECT SUBCONTRACTING COSTS</b>			
			0,00
<b>C. DIRECT PURCHASE COSTS</b>			
<b>C.1 Travel and subsistence</b>			0,00
<b>C.2 Equipment (complete 'Depreciation costs' sheet)</b>			
<i>Equipment</i>			0,00
<i>Infrastructure</i>			0,00
<i>Other assets</i>			0,00
<b>C.3 Other goods, works and services</b>			
<i>Consumables</i>			0,00
<i>Services for meetings, seminars</i>			0,00
<i>Services for dissemination activities (including website)</i>			0,00
<i>Publication fees</i>			0,00
<i>Other (shipment, insurance, translation, etc.)</i>			0,00

- Subcontracting → Best Value for money and/or lowest price
- **Travel → Institution practices**
- **Equipment → depreciation**



# Subcontracting

Subcontractors must implement their action tasks in accordance with Article 11. The beneficiaries' costs for subcontracting are considered entirely covered by the lump sum contributions for implementing the work packages (**irrespective of the actual subcontracting costs incurred, if any**).

The beneficiaries must ensure that their contractual obligations under **Articles 11 (proper implementation), 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility), 18 (specific rules for carrying out action), 19 (information) and 20 (record-keeping)** also apply to the subcontractors.



Enter your subcontracting costs in section "B. DIRECT SUBCONTRACTING COSTS".

A beneficiary can have more than one subcontract associated to a work package. In this case, the cost per item is the average cost of all subcontracts, and the number of items is the number of subcontracts.



# Purchase costs – Equipment

- *[OPTION 1 by default → depreciation only]*
- *[OPTION 2 if selected for the call: full cost only]*
- *[OPTION 3 if selected for the call: depreciation and full cost for listed equipment]*
- *[OPTION 4 if selected for the call: full cost and depreciation for listed equipment]*



- Depreciation during the reporting period
- If the beneficiary does not use the equipment exclusively for the action, only **the portion used on the action may be charged** (the amount of use must be auditable)

# Equipment – Depreciation Costs

## DEPRECIATION COSTS

To calculate the depreciation costs, you need to:

- Enter the price of the equipment in the column "Purchase costs"
- Enter the percentage of usage of the equipment for the project in the column "% used for the project"
- Complete the column "% of useful life of the equipment in the project". To obtain the correct value, divide the period (in months) during which the equipment is used for the project by the depreciation period (in months) for the equipment. Multiply the result by 100%.

The resulting amount is **NOT** automatically transferred to the respective 'BEx' sheet. You must add it manually in category "C.2 Equipment" under the appropriate work package in the 'BEx' sheet of the beneficiary concerned. If you have several items in the 'Depreciation costs' sheet to be encoded in one row (same beneficiary, same work package, and same resource type), you must enter the average cost and the number of items.

More information on calculating depreciation costs is available in the [Annotated Model Grant Agreement](#). The rules on actual depreciation costs apply equally to lump sum grants except that the calculation is based on estimations and the result is included in the lump sum budget at proposal stage.





# Lump sum budget – Other Cost categories

COST CATEGORY	BE1 name		
	UNITS	COST PER UNIT	BE TOTAL COSTS
<b>COSTS WORK PACKAGE 1: WP1 name</b>			
<b>D. OTHER COST CATEGORIES</b>			
D.1 Financial support to third parties (if applicable in the topic specific conditions)			0,00
D.2 Internally invoiced goods and services			0,00
D.3 Transnational access to research infrastructure unit costs (if mentioned as eligible in the topic specific conditions)			0,00
D.4 Virtual access to research infrastructure unit costs (if mentioned as eligible in the topic specific conditions)			0,00
D.5 PCP/PPI procurement costs (if mentioned as eligible in the topic specific conditions)			0,00
TOTAL DIRECT PERSONNEL COSTS AND PURCHASE COSTS (A+C)			0,00
TOTAL DIRECT COSTS (A+B+C+D)			0,00
E. INDIRECT COSTS (25% * (A+C))			0,00
F. TOTAL COSTS (A+B+C+D+E)			0,00

- **D. OTHER COST CATEGORIES → When foreseen on topic text + internal practices (D.2 Internally invoiced goods and services)**
- **E. INDIRECT COSTS → 25%**





# “Any comments” table – F&T portal

Order no.	Participant name	Role	PIC
1	ANI	Coordinator	999941476



Participant name	Work package number	Work package name	Work package total costs	Requested EU contribution
ANI	WP1	Management 1	39,812.5 €	37,812.5 €

Participant name	Work package number	Work package name *
ANI	<input type="text" value="WP1"/>	<input type="text" value="Management 1"/>

Comments ?

1000

## A. Direct personnel costs

### A.1 Employees (or equivalent) (a1) \*

					27,650 €
Senior Scientists (or equivalent in the private sector)	*	<input type="text" value="2.3"/> person month	x	* <input type="text" value="5,500"/> €	= <input type="text" value="12,650"/> €
Junior Scientists (or equivalent in the private sector)	*	<input type="text" value="5"/> person month	x	* <input type="text" value="3,000"/> €	= <input type="text" value="15,000"/> €
Technical Personnel (or equivalent in the private sector)	*	<input type="text" value="0"/> person month	x	* <input type="text" value="0"/> €	= <input type="text" value="0"/> €



# Annex 2 - Estimated budget

## ESTIMATED BUDGET

ANNEX 2 XXX LUMP SUM MGA — MULTI & MONO

ESTIMATED BUDGET (LUMP SUM BREAKDOWN) FOR THE ACTION

Estimated EU contribution												
Estimated eligible lump sum contributions (per work package)												Maximum grant amount <sup>1</sup>
WP1 [name]	WP2 [name]	WP3 [name]	WP4 [name]	WP5 [name]	WP6 [name]	WP7 [name]	WP8 [name]	WP9 [name]	WP10 [name]	WP [XX]		
Forms of funding	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	/ Lump sum contribution / Financing not linked to costs /	
	a	b	c	d	e	f	g	h	i	j	k	$l = a + b + c + d + e + f + g + h + i + j + k$
1 - [short name beneficiary]												
1.1 - [short name affiliated entity]												
2 - [short name beneficiary]												
2.1 - [short name affiliated entity]												
c - [short name associated partner]												
Total consortium												



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# Annex 4 - Model for the financial statements

## MODEL FOR THE FINANCIAL STATEMENTS

ANNEX 4 XXX LUMP SUM MGA — MULTI & MONO

FINANCIAL STATEMENT FOR THE ACTION FOR REPORTING PERIOD [NUMBER]

EU contribution												
Eligible lump sum contributions (per work package)												Requested EU contribution
WP1 [name]	WP2 [name]	WP3 [name]	WP4 [name]	WP5 [name]	WP6 [name]	WP7 [name]	WP8 [name]	WP9 [name]	WP10 [name]	WP [XX]		
Forms of funding	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	/ Lump sum contribution./ Financing not linked to costs./	
Status of completion	COMPLETED	COMPLETED	COMPLETED	COMPLETED	COMPLETED	COMPLETED	COMPLETED	PARTIALLY COMPLETED	PARTIALLY COMPLETED	COMPLETED	NOT COMPLETED	
	a	b	c	d	e	f	g	h	i	j	k	$l = a + b + c + d + e + f + g + h + i + j + k$
1 - [short name beneficiary]												
1.1 - [short name affiliated entity]												
2 - [short name beneficiary]												
2.1 - [short name affiliated entity]												
X - [short name associated partner]												
Total consortium												



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Time to

**Q & A**



**Pausa para almoço**

**Regressamos às 14h00**

[www.ani.pt](http://www.ani.pt)

17 mar 2026



# Financiamento lump sum

Avaliação, gestão de projeto e implementação

[www.ani.pt](http://www.ani.pt)

Alexandre Marques

17 mar 2026

# Evaluation of a lump sum proposal

- ❑ Your proposal will be evaluated by independent experts against the **standard evaluation criteria**: excellence, impact, and implementation.
- ❑ The cost estimations will be assessed against the proposed activities under the **implementation** criterion.
- ❑ Experts will:
  - ❑ ensure that the cost estimations are **reasonable and non-excessive**
  - ❑ evaluate whether the proposed resources and the split of the lump sum **allow completing the activities described in the proposal**.
- ❑ If the experts find overestimated costs, they make **concrete recommendations** on the budget that are recorded in the Evaluation Summary Report. This will be reflected in a modified lump sum amount in the grant agreement.
- ❑ If the lump sum budget needs to be modified, this **does not decrease your proposal's chances** of success. However, serious flaws in the proposed budget reduce the score



# Grant preparation

- We follow the standard process to prepare the grant agreement.
- The grant agreement for your project will be based on the [Model Grant Agreement for lump sum grants](#).
- The 'no negotiation' principle applies. The grant agreement is prepared on the basis of the proposal you submitted. However, some changes might be necessary:
  - correcting obvious errors and inconsistencies
  - other changes necessary to comply with applicable rules
  - adjustment of the lump sum to the amount specified in the Evaluation Result Letter
- The [breakdown of lump sum shares per beneficiary and per work package](#) is included in the grant agreement as Annex 2. The submitted detailed lump sum budget table is not part of the lump sum grant agreement.
- Once the lump sum is fixed in the grant agreement, [it will not be questioned](#) if the prices for goods or services change later on.



# Lump Sum – Financial Risk

## Real and perceived financial risks and how to mitigate them

1. How to effectively monitor technical progress to ensure timely completion of work packages?  
Less focus on financial accuracy and monitoring  
**Need to develop new monitoring processes within institution and at consortium level (CA)**

2. How to **attribute responsibility/blame** in case of non-completion and/or rejection?  
Robust rules in CA regarding **responsibility, liability and payment schedule**  
Use WP description, **deliverables and tasks to clarify lead responsible partner**  
**Differentiate in CA between rejected deliverable and non-completed deliverable?**  
Preference for experienced and trusted partners?

3. **How to negotiate and prove costs/effort in case of partial reimbursement of WP?**

Keep detailed budget table up to date, even if not part of GA

A more detailed budget table, with budget per deliverable or task and included in CA, can help to negotiate with EU and to clarify each partner's stake/liability.



# Liability on R&I projects

- Technical and Scientific Responsibility →
  - Most part of Horizon Europe projects are based on collaborative projects
- **All partners share the responsibility of a proper implementation of the project tasks**
- Financial liability
  - **Mutual insurance mechanism (previous Guarantee Fund)**
  - E.g. Bankruptcy



# Liability on Horizon Europe projects → Grant Agreement

CHAPTER 4 GRANT IMPLEMENTATION

SECTION 1 CONSORTIUM: BENEFICIARIES, AFFILIATED ENTITIES AND OTHER PARTICIPANTS

ARTICLE 7 — BENEFICIARIES

**They are jointly responsible for the technical implementation of the**

**action.** If one of the **beneficiaries fails to implement their part of the action, the other beneficiaries must ensure that this part is implemented by someone else** (without being entitled to an increase of the maximum grant amount and subject to an amendment; see Article 39). The financial responsibility of each beneficiary in case of recoveries is governed by Article 22



# Liability on the Grant Agreement

---

## ARTICLE 11 — PROPER IMPLEMENTATION OF THE ACTION

### 11.1 Obligation to properly implement the action

The beneficiaries must implement the action as described in Annex 1 and in compliance with the provisions of the Agreement, the call conditions and all legal obligations under applicable EU, international and national law.

### 11.2 Consequences of non-compliance

If a beneficiary breaches any of its obligations under this Article, the grant may be reduced (see Article 28).

Such breaches may also lead to other measures described in Chapter 5.



# Identify potential risks on the proposal

Table 3.1e: Critical risks for implementation #@RSK-MGT-RM@#

Description of risk (indicate level of (i) likelihood, and (ii) severity: Low/Medium/High)	Work package(s) involved	Proposed risk-mitigation measures

## Definition critical risk:

A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.

## Level of likelihood to occur: Low/medium/high

The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.

## Level of severity: Low/medium/high

The relative seriousness of the risk and the significance of its effect.



# Liability → Consortium Agreement → DESCA

## 5.2 Limitations of contractual liability

No Party shall be responsible to any other Party for any indirect or consequential loss or similar damage such as, but not limited to, loss of profit, loss of revenue or loss of contracts, provided such damage was not caused by a wilful act or by a breach of confidentiality.

A Party's aggregate liability towards the other Parties collectively shall be limited to **Insert: once or twice** the Party's share of the total costs of the Project as identified in Annex I of the EC-GA provided such damage was not caused by a wilful act **or gross negligence**.

The terms of this Consortium Agreement shall not be construed to amend or limit any Party's statutory liability.



# Consortium Agreement → DESCA – Differences with Actual costs

“**Consortium Plan**” - Consortium Plan means the Description of the Action (Annex 1 of the Grant Agreement) and estimated budget (Annex 2 of the Grant Agreement) as defined and reallocated according to the amendments to the Grant Agreement.

“**Work Package Leader**” - Work Package Leader means a representative of the Party appointed to lead a work package according to Annex 1 of the Grant Agreement, who shall coordinate the completion of activities for the tasks in the relevant work package → **Clause 6.5 Work Package Leaders Group**

## **.5 Specific responsibilities regarding reporting and implementation**

4.5.1 Internal Progress Reports

4.5.2 Proper implementation



# Consortium Agreement → DESCA – Differences with Actual costs

**7.1.2 Justifying Costs / Justifying Lump Sum Contributions** - Each Party contributes with complete, reliable and true information to all reporting requirements regarding the completion of work packages and proper implementation. Moreover, adequate records and supporting documents must be provided by the Parties concerned upon request of the Granting Authority in accordance with the Grant Agreement. Each Party is solely liable for justifying its Lump Sum Contribution or share.

**7.1.6 Financial Consequences of the termination of the participation of a Party** - A Party leaving the consortium shall refund to the Coordinator any payments it has received except the amount of Lump Sum Contributions accepted by the Granting Authority [or another contributor] at termination.

**7.2.2. Payment mode** - The Coordinator will transfer payments in accordance with Art. 7 and 22.1 of the Grant Agreement following this payment scheme. The initial prefinancing will be set in the instalment table (see below) at a fixed percentage and paid accordingly. Further prefinancing instalments will be paid by the Coordinator upon positive performance assessment



# Consortium Agreement → DESCA – Payments (7.2)

Prefinancing will be paid by the Coordinator to the Parties after receipt of payment from the Granting Authority in separate instalments as agreed below (example):

30 % of prefinancing	initial prefinancing on receipt of prefinancing by coordinator	without undue delay after receipt of prefinancing by Coordinator
15 % of prefinancing	further prefinancing	3 or 6 months after starting date of the project
15 % of prefinancing	further prefinancing	[...]
15 % of prefinancing	further prefinancing	[...]
...		





# Financiamento lump sum

Avaliação, gestão de projeto e implementação

[www.ani.pt](http://www.ani.pt)

Pedro Miranda

17 mar 2026

# Technical reporting

- **Standard technical periodic report [template](#) available directly in the Grant Management System. The ‘use of resources’ report will however not be required for lump sum grants.**
- **The technical report should detail who did what** (at the level of the participating organisations, not at the level of individual staff), indicating the contributions from beneficiaries, affiliated entities, associated partners, and subcontractors.

## 5.2 Use of resources *(n/a for MSCA and Lump Sums)*

Include explanations on deviations of the use of resources between actual and planned use of resources in Annex 1, especially related to person-months per work package.

Include explanations on transfer of costs categories (if applicable).

Include explanations on adjustments to previous financial statements (if applicable).



Project: [insert number] — [insert acronym] — [insert call identifier]

EU Grants: Periodic report/Additional prefinancing report/Beneficiary termination report (HF: V1.1 – 01.05.2023)

### REPORT ON THE USE OF RESOURCES — COST EXPLANATIONS

*The report must be filled out directly on the Portal Financial Statements screen.*

Personnel costs	
<i>Financial Statement screen — When you enter the costs, pop-ups will appear to ask you for more details.</i>	
Personnel costs declared as actual costs (if applicable)	
Person-months	Work Package
[insert number person-months]	WP 1
[insert number person-months]	WP 2
[insert number person-months]	WP 3
	...

# Payments



## Pre-financing payment

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



## Interim payment(s)

- One or more
- Payment of 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

# Prefinancing in Lump Sums

- Same as Grants based in Actual Costs

Project duration in months	Number of periods	Prefinancing
1-18	1	< 100 %
19-36	2	< 80 %
37-54	3	< 53 %
55-72	4	< 40 %

- [Horizon Europe Work Programme 2026-2027 » 15. General Annexes:](#)

After the grant has been signed, the consortium will normally receive a float to start working on the project (**normally, pre-financing of 160% of the average EU funding per reporting period (i.e. maximum grant amount/number of periods)**); exceptionally, less or no pre-financing). For actions with only one reporting period, it will be less, since 100% would mean the totality of the grant amount.

At the moment of the prefinancing payment, **an amount ranging from 5% to 8% of the maximum grant amount will be deducted from the prefinancing payment** and transferred to the mutual insurance mechanism. This mechanism covers the risks associated with non-recovery of sums due from the beneficiaries.



# Financial reporting

- **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, i.e all essential work has been completed and/or equivalent work has been carried out and/or when deviations have been duly justified.**

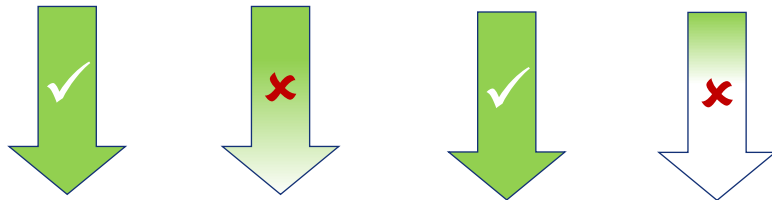
## WP assessment

- The work to be completed includes the activities described as part of the objectives, milestones, and deliverables that are linked to the work package
- In Horizon Europe work packages are assessed based on the activities carried out:
  - reaching objectives and milestones successfully is desirable **but not a requirement for completion of the work packages**
  - normally, all deliverables must be completed, **meaning that the underlying work has been done, and the deliverable reports have been submitted and accepted, while a successful outcome is not required.**
  - **exceptionally, work packages can be considered complete without all deliverables having been completed**, as long as the deviation (e.g. delays or modification) has been duly justified.

# Financial reporting

- 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	
<b>Total</b>	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.



If several beneficiaries carry out a work package, they cannot declare it as completed until all of them have completed it.

# Implementation **deviations**

- If the implementation of the project deviated from the work plan for technical reasons, **and a work package cannot be completed as described in the grant agreement:**
  - It is possible **report the deviation in the dedicated section of the technical report**; if duly justified, the deviation can be accepted with the technical report.
  - alternatively, it is possible to **introduce an amendment to address the situation**, with the aim of making the completion of the work package feasible. For example, **to propose a feasible alternative to the initial work package description, based on equivalent work that can be carried out**. The assessment of the report will be based on the latest version of the grant agreement, **meaning that an amendment must be completed before the assessment of the report, in order to be taken into account**.

## Partial completed WP

- Exceptionally, at the end of the last reporting period, **it is possible to declare a work package as partially completed.**
  - In this case, **it is mandatory to indicate a percentage of completion.**
  - The work packages are declared as **partially completed if essential parts have not been carried out and not been replaced with equivalent work.** This needs to be explained and justified in the final technical report.
  - The **percentage of completion declared should correspond to the share of activities described in the grant agreement that have been carried out.**
  - The **degree of completion is not linked to cost expenditure or use of resources.**

# Partial competed WP - Examples

## Examples of acceptable partial WPs:

- 1) A work package cannot be completed because the underlying method does not work as planned. Despite best efforts, **no feasible alternative method became available.**
- 2) A **key member of staff is no longer able to work** on the project (e.g. due to resignation, parental leave, or long sick leave). **Without the expertise of this person, the activities of a work package cannot be finished, and it is not possible to replace the person within a reasonable time frame.**
- 3) There is a **serious supply problem** on the market, and it is no **longer possible to buy essential consumables** needed to perform the analysis of environmental samples as described in the grant agreement. The missing components cannot be replaced, and alternative analytical methods do not provide the required sensitivity. **As a result, the work package concerned cannot be completed.**
- 4) A **beneficiary requests terminating its participation in the action because a fire devastated its laboratory** where most of the technical equipment and computers used for the project were located. **This is a case of force majeure where the beneficiary cannot complete its work in the project.** Against this background, the work packages concerned are accepted in part (in proportion to the work carried out).



# Partial competed WP - Examples

## Examples of non-acceptable partial WPs:

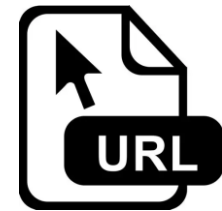
- 1) Beneficiaries A, B and C are involved in a work package. At the end of the project, **this work package is declared as partially completed. While A and B fully completed their work, C completed its work only partially.** The technical assessment of the work done reveals that **C wilfully stopped collaborating** in the project and that the partial work done was not performed according to the state-of-the-art carbon-neutral method described in the grant agreement. C has special know-how for this method and was included in the project for this particular reason. **Against this background, only the lump sum shares of A and B are paid. The contribution of C is considered non-implemented and is rejected.**
- 2) **The consortium argues that they did not have enough time to complete the work package. The delay was not previously reported,** there is no proper justification, and there was no clear effort to manage it (e.g. no attempt to speed up or to address the situation through an amendment). **Against this background, the work package is rejected in full.**
- 3) **The project turned out to be more expensive than budgeted, and the consortium stopped the work in one or more work packages. The consortium did not report and justify the problem** and made no effort to resolve it (e.g. through an amendment). **Against this background, the partially completed work packages concerned are rejected.**

# Partial competed WP - Examples



European Commission

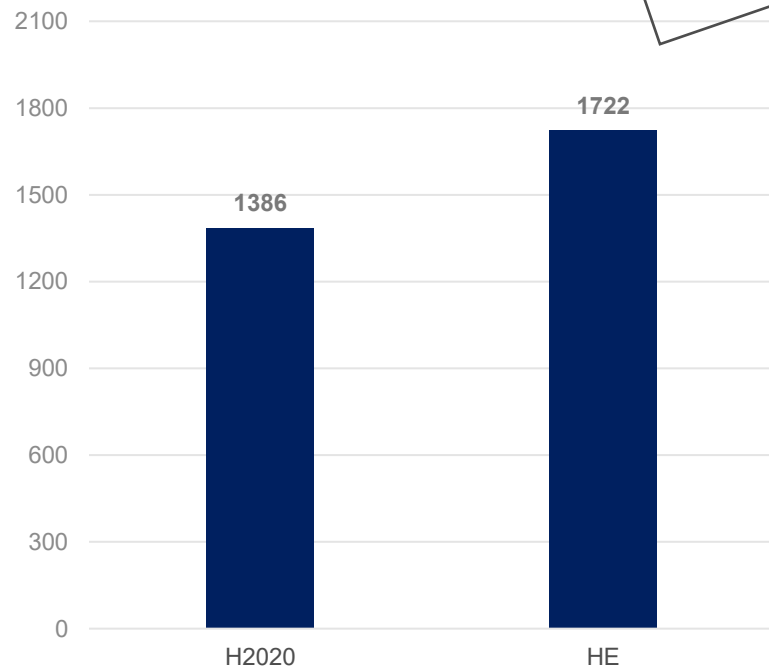
What if a partner performs their tasks in a WP but other partners don't? No-one gets paid?



# Acceptance of work packages – in practice

- 1 060 closed lump sum grants (Jan 2026)

Work packages declared in closed grants



of which

- **At final payment**
  - 99% were paid as declared
  - 1% were partially rejected
- **At intermediate payment**
  - Rejection of work packages is rare (2%); → payment delayed to the next reporting period
- **Controls work according to the Commission**
- **No evidence of increased financial risks for beneficiaries**

# Keeping records

## Consortium needs to keep (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



Same as for all Horizon Europe grants

## Consortium doesn't need to keep\*

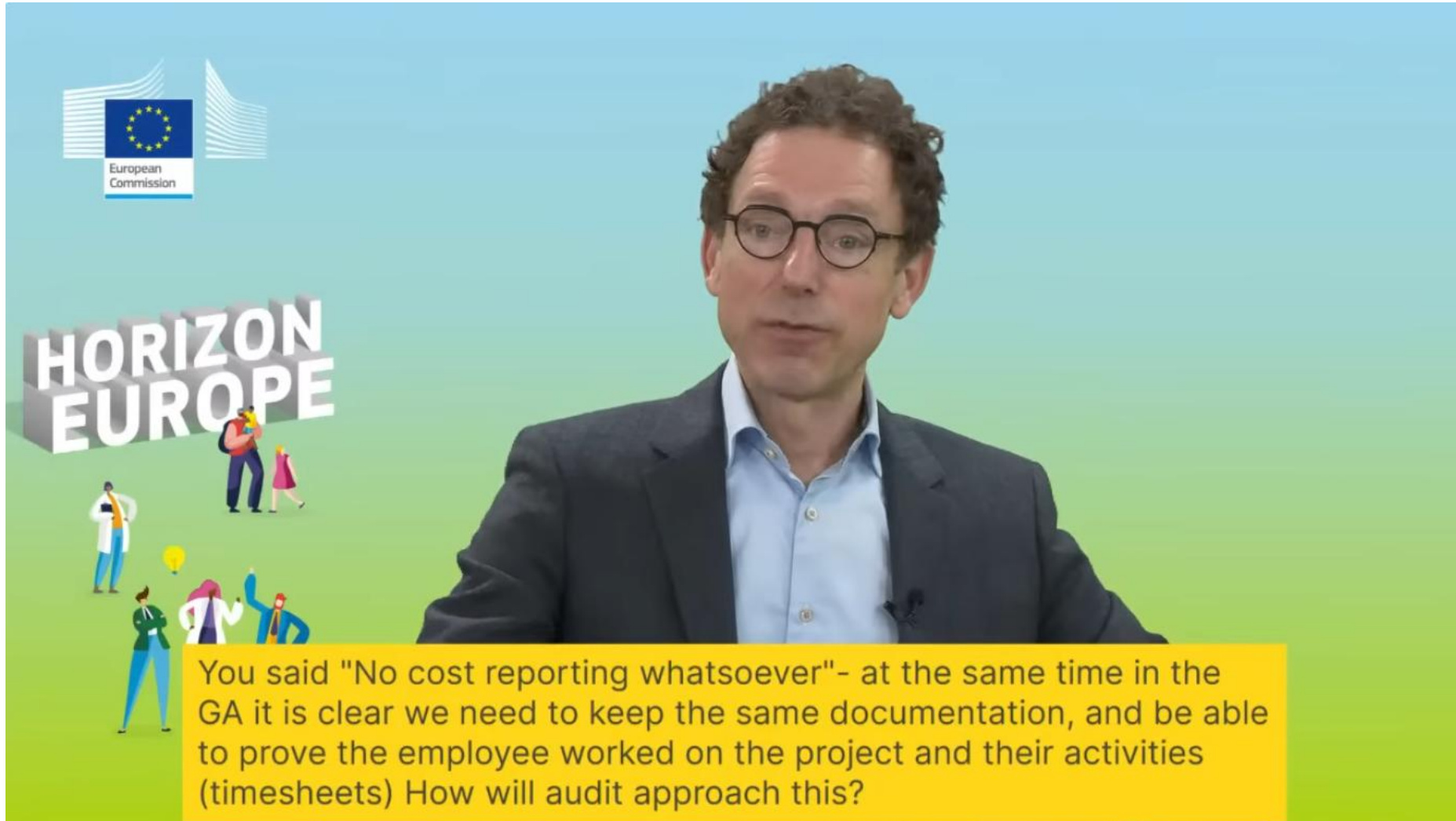


- Time-sheets
- Pay-slips or contracts
- Depreciation policy
- Invoices
- ...any documents proving the actual costs incurred

\*Participants still need to comply with financial record keeping obligations outside the grant agreement, if any (e.g., under national law or internal procedures)



# Keeping records – Question



European Commission

HORIZON EUROPE

You said "No cost reporting whatsoever"- at the same time in the GA it is clear we need to keep the same documentation, and be able to prove the employee worked on the project and their activities (timesheets) How will audit approach this?



# Ex-post controls

## Checks and reviews for:



Proper implementation of the action (e.g. technical review)



Compliance with the other non-financial obligations of the grant, e.g.



IPR obligations

Ethics and integrity

Open science

Dissemination

Etc.



**No financial checks, reviews and audits by EU services**



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# Ex-post technical reviews - Status

## Horizon 2020 sample

- 3 reviews selected and completed
- No findings

## Horizon Europe sample

- 30 reviews selected, almost all completed
- 28 reviews without findings, 2 reviews with findings (MSCA & ERC PoC » 1 related to an event not fully realized, 5% cut in an ERC PoC)



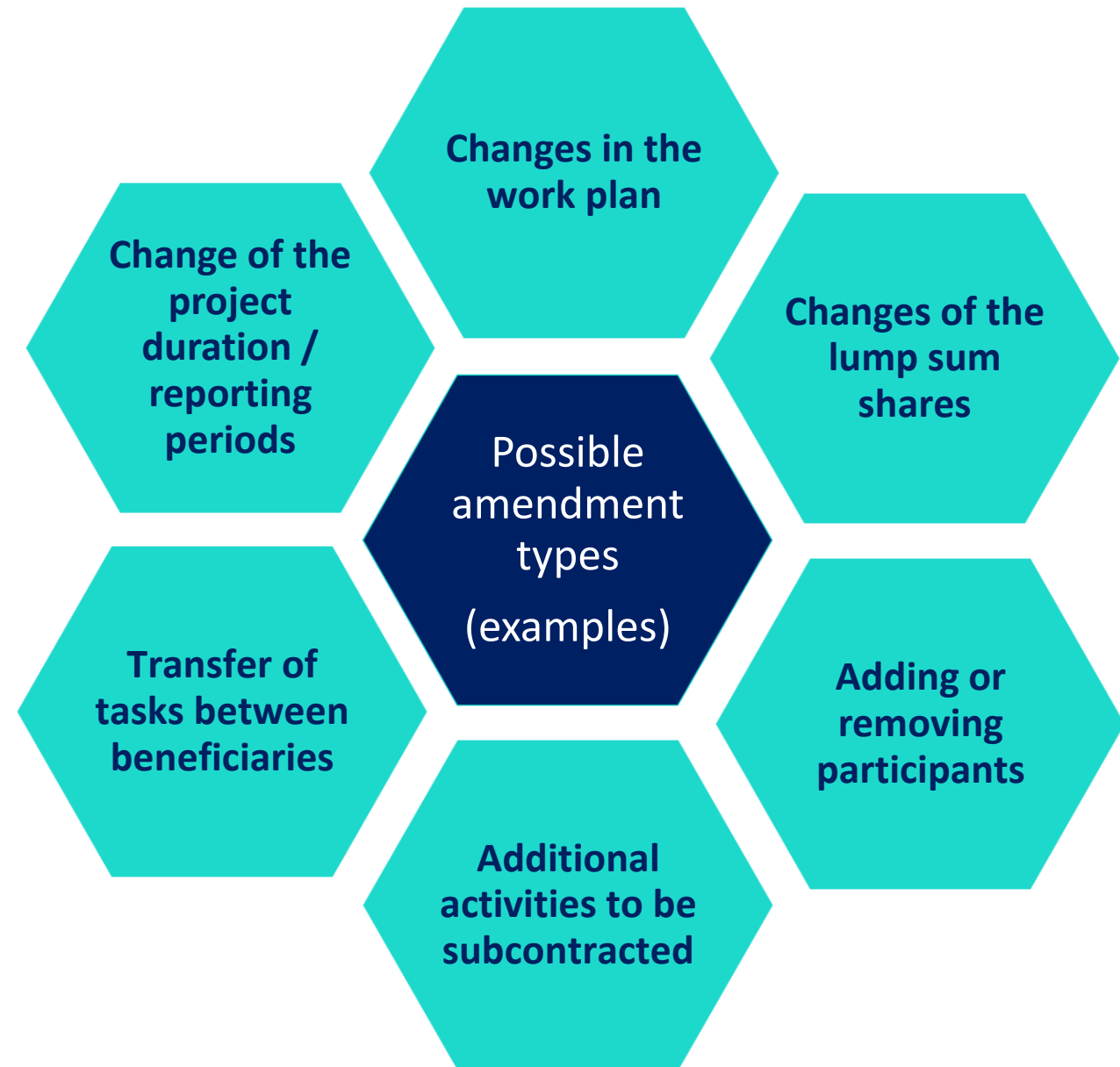
## Initial feedback from Commission services

- Reviews went smoothly, incl. identifying and evaluating the work done
- Some suggestions to improve IT workflow (e.g. access and document management)
- Internal lessons learned exercise on first batch of ex-post technical reviews (to follow in the next months)



# 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.**
- A technical review is needed to amend Horizon 2020 lump sum grants (no longer needed under Horizon Europe).
- **Deviations from the work plan can also be flagged in the periodic report** (simplified procedure).



# Amendments

- Possible to introduce changes to individual work packages and to the work plan through an amendment. **However, work packages that have already been completed and paid cannot be amended.**
- All other parts and aspects of the lump sum grant agreement can be amended in the same way as for actual cost grants. This includes:
  - extension of the project duration
  - change of reporting periods
  - changes in the work plan (change of Annex 1, e.g. work packages, tasks, deliverables)
  - transfer of activities between beneficiaries
  - new/additional activities to be subcontracted
  - adding or removing beneficiaries, affiliated entities or associated partners.
- Changes to the work plan may or may not require budget transfers, which require an update of the breakdown of lump sum shares (Annex 2).d.



# Budget transfers

- The **consortium is free to spend the lump sum as they see fit**, provided the **project is carried out as described in the grant agreement**.
- Commission assumes the distribution in accordance with the lump sum budget table (e.g. for partial work package completion, grant reductions, offsetting of debts from other grants). **Thus, in case there are substantial differences to the real implementation, it may be in the consortium interest to formalise changes to the budget via an amendment.** (relevant for the example 1 in slide 11)
- Such budget transfers may be done:
  - within the same work package (i.e. increasing the share of one beneficiary and decreasing the share of another) and/or
  - between work packages (i.e. increasing the share allocated to one work package and decreasing the share of another).
- These changes must be justified on the basis of the technical implementation of the action. **Transfers from or to a work package which has already been declared completed and paid in a preceding reporting period are NOT allowed.**



# Lump Sum **Guidance**

One dedicated [lump sum page](#) on the Funding & Tenders Portal with:

## Video tutorials

- [How to evaluate lump sum proposals: Get started](#)
- [Detailed budget table](#)
- [Horizon dashboard for lump sum evaluations](#)

## Guidance documents

- [What do I need to know? & Quick guide](#)
- [Frequently asked questions](#)
- [Detailed guidance for participants](#)
- [Lump sum briefing slides for experts](#)

## Reference documents

- [Model Grant Agreement Lump Sum](#)
- [Decision authorising the use of lump sum contributions under the Horizon Europe Programme](#)
- [DESCA](#)

## Studies

- [European Commission assessment \(Sep 2024\)](#)
- [European Commission assessment \(Oct 2021\)](#)
- [European Parliament \(STOA\) study on lump sums in Horizon 2020 \(May 2022\)](#)

## Events

- [Future & Past events and recordings](#)



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ANI – Horizon Europe

Time to

**Q & A**