

UKRO European Liaison Officer Online Catch-up

7 June 2023



Housekeeping



All participants will be muted for the duration of the webinar.



A chat function is available and will be monitored.



The session is **not** recorded. A summary will be published



Please use the Q&A box to submit questions.



UK Research Office
Brussels

Agenda

10:00 - 10:05 **Welcome**, Christina Miller, UKRO Director

10:05 - 10:55 **Plenary session**

Summary of the MSCA Focus Group, Malgorzata Czerwiec, UKRO

Update on the Guarantee with Q&A time with UKRI,

John Jensen, Head of Customer Support, Innovate UK

Ben Williams, Head of International Policy Delivery, UKRI

Introduction to discussion topics, UKRO

10:55 - 11:00 Comfort break

11:00 - 11:40 **ELO group discussions**

11:40 - 11:50 **Feedback session**

11:50 - 12:00 **Event close**, Georgina Drury, UKRO Deputy Director



UKRO MSCA Doctoral Networks & Staff Exchanges Focus Group



UK Research Office
Brussels



UKRO MSCA DN and SE Focus Group Feedback

UK partners' contributions to the central project management budget

- Using UKRI funding to cover project-wide activities is allowed under the Guarantee
- Payment modalities negotiable and should be included in the consortium agreement or agreed bilaterally (in writing) with the coordinator (e.g. staggered payments 60/20/20%); discuss recovery routes for Associated Partners (AP) in case of any overpayments
- Usually APs contribute to the management budget at the same rate as beneficiaries (normally between 50-80%, depending on the consortium decision), but examples of lower rates for APs were also reported
- Bank transfer to the coordinator – practices varies – check with your Finance Office for the supporting documents policy (no standard “invoice” available) – in most cases the consortium or bilateral agreement suffice / some entities have non-standard payment procedures



UKRO MSCA DN and SE Focus Group Feedback

Doctoral Networks considerations

- UK host institutions participate in the project-wide recruitment campaign, while including information for UK-based fellows in their vacancy notice (UKRI HE Guarantee specificities, funding rules, etc.)
- The Global Talent scheme reported to work well for MSCA fellows, but the Academic Technology Approval Scheme (ATAS) certificate can cause delays – have a back-up plan (reserve list)
- A set exchange rate has facilitated salary calculations and payments to fellows
- Claiming PhD fees practices continue to vary across the UK (full tuition fee/reduced fee for employees/waiving the fees) – eligible under the Guarantee, but demanding for projects' budgets
- Consortium Agreement – lack of a model for Horizon Europe MSCA DN challenging
- Fewer Joint Doctorates with UK participants (impact of the UK HE association delay)

UKRO MSCA DN and SE Focus Group Feedback

Staff Exchanges considerations

- Top-up allowance payments – approach based on H2020 MSCA RISE practices: can be paid via reimbursements of travel and subsistence costs against receipts and any the remaining amount paid directly to the seconded staff member at the end of the secondment (tax rules apply)
- Guarantee covers UK-based secondments from LMICs third countries not directly receiving EC funding – mixed practices agreed in bilateral agreements: transfer to the sending institution or direct payments to secondees (retain the evidence of the total amount paid to the secondees)
- UKRI funding covers all originally planned outgoing secondments from the UK, including those to other counties not in the list of participating counties in Horizon Europe (make sure to keep these secondments in the final Description of Work at the Grant Agreement Preparation stage)
- Reminder: PhD students eligible as “staff” participating in SE secondments (SE uniqueness)

UK Performance in Horizon Europe – Success rates

+1200 grant agreements
with UK organisations
signed to date.

Country	Eligible Proposals	Retained Proposals	Success Rate
Germany	12,828	2,664	20.77%
Spain	12,075	2,230	18.47%
Italy	11,763	2,161	18.37%
United Kingdom	10,438	2,028	19.43%
France	9,601	2,041	21.26%
Netherlands	7,751	1,758	22.68%
Belgium	6,738	1,589	23.58%
Greece	4,982	977	19.61%
Portugal	4,373	774	17.70%
Sweden	4,354	865	19.87%
Austria	4,218	891	21.12%
Denmark	3,754	840	22.38%
Switzerland	3,425	783	22.86%
Finland	3,237	679	20.98%
Ireland	3,166	648	20.47%
Norway	2,955	657	22.23%



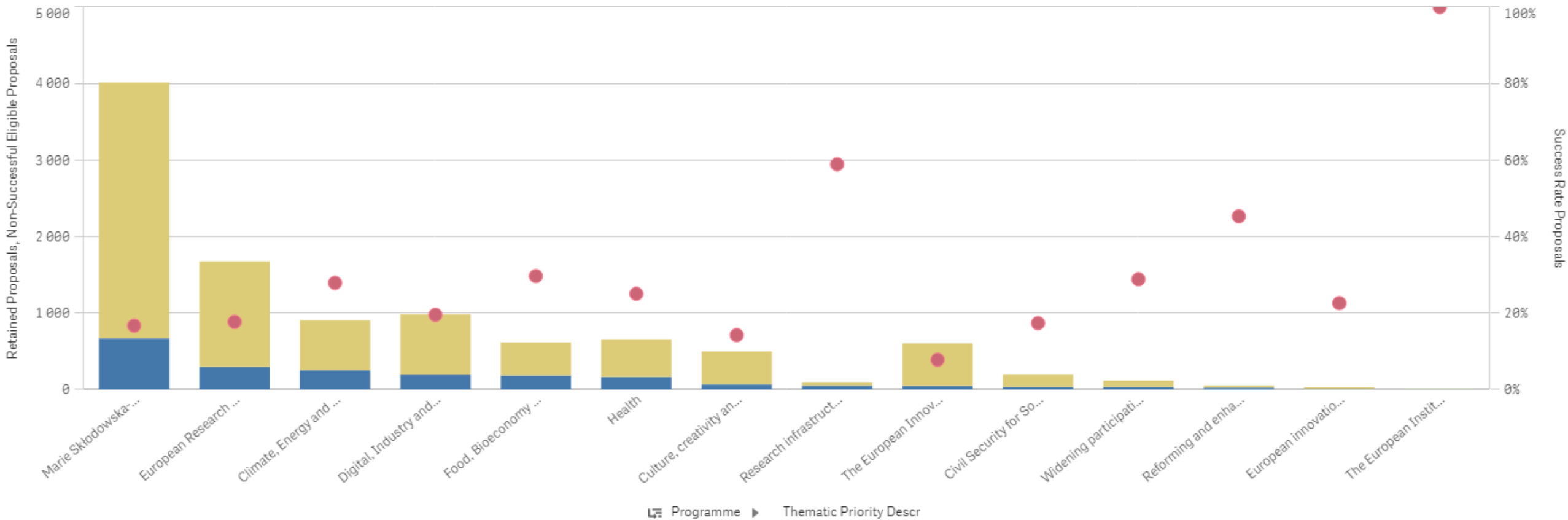
UK Research Office
Brussels

Average success rate 16.8%

Source: Horizon Dashboard, data extracted on 6 June 2023

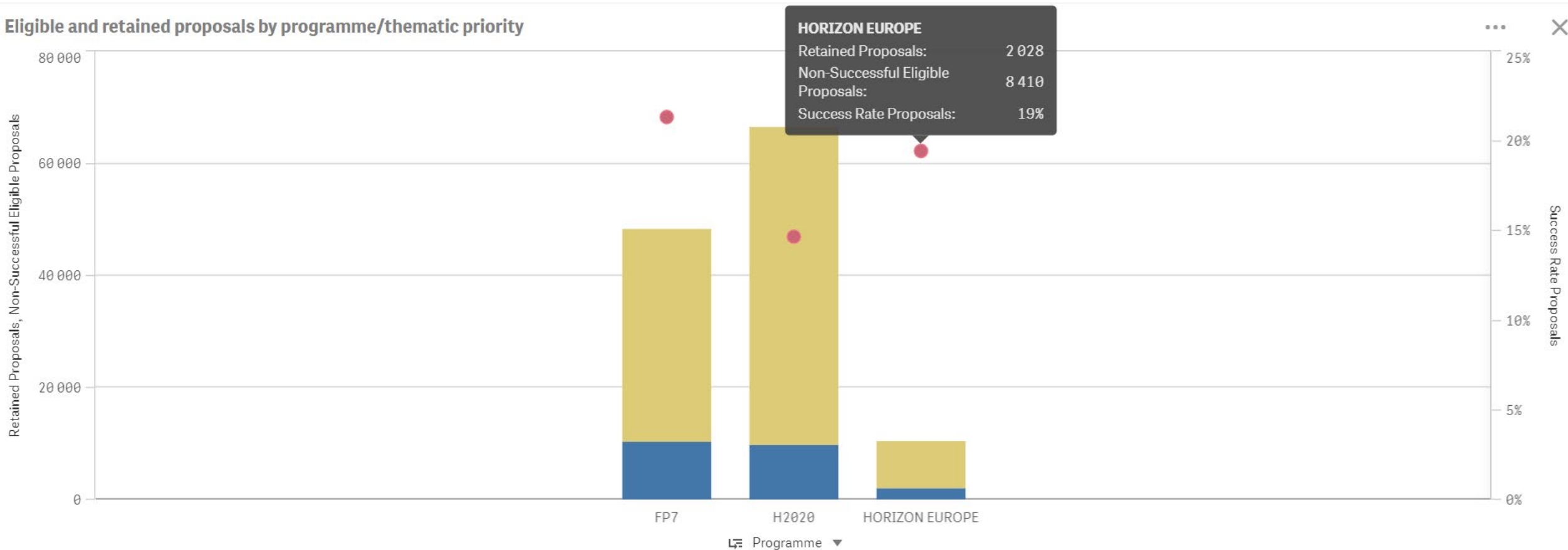
UK Performance in Horizon Europe – Success rates

Eligible and retained proposals by programme/thematic priority



UK Performance in Horizon Europe – Success rates

Eligible and retained proposals by programme/thematic priority



UK Research Office
Brussels

Source: Horizon Dashboard, data extracted on 6 June 2023

Statistics for the Horizon Europe Guarantee

Number of applications and grant offers made through HE Guarantee up to 31 May 2023.

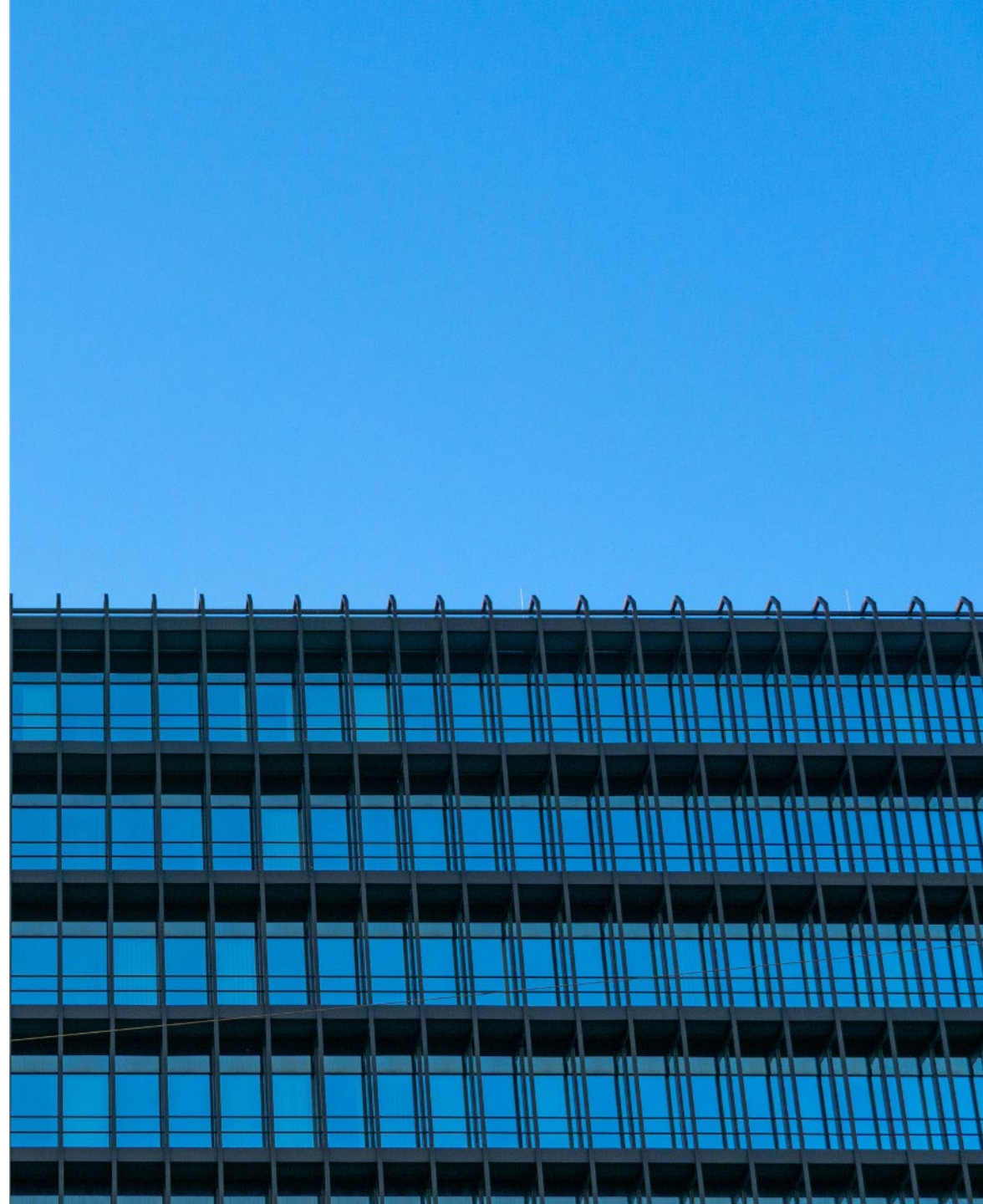
Guarantee grant type	Applications submitted and verified	Value of grants requested in verified applications	Grant offer letters issued	Value of grant offers issued
Collaborative Horizon Europe guarantee grants (hosted on Innovation Funding Service)	1,591	£703 million	1,457	£631.2 million
European Research Council guarantee grants	268	£386.1 million	262	£376.9 million
Marie Skłodowska-Curie Actions guarantee grants	444	£97.9 million	424	£94.3 million
Total	2,303	£1,187 million	2,143	£1,102.4 million



UK Horizon Europe Guarantee Update with UKRI



UK Research Office
Brussels



ELO Group Discussions (~35 min)

- Early experiences with the Horizon Europe lump sum funding
- UK HE Guarantee IFS financial reporting (focus on non-personnel costs)
- Personnel costs in Horizon Europe and UK HE Guarantee reporting

Horizon Europe lump sum funding

- Budget allocation (Annex 2 to the Grant Agreement) agreed collectively by consortium

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

Shares of the lump sum per beneficiary

Shares of the lump sum per WP

Lump sum = Maximum grant amount

- In most calls the consortium defines the lump sum in the proposal (shares per work package)
- Excel budget table for cost estimations for each cost category per beneficiary
- The financial report will be much simplified and to a large extent automated

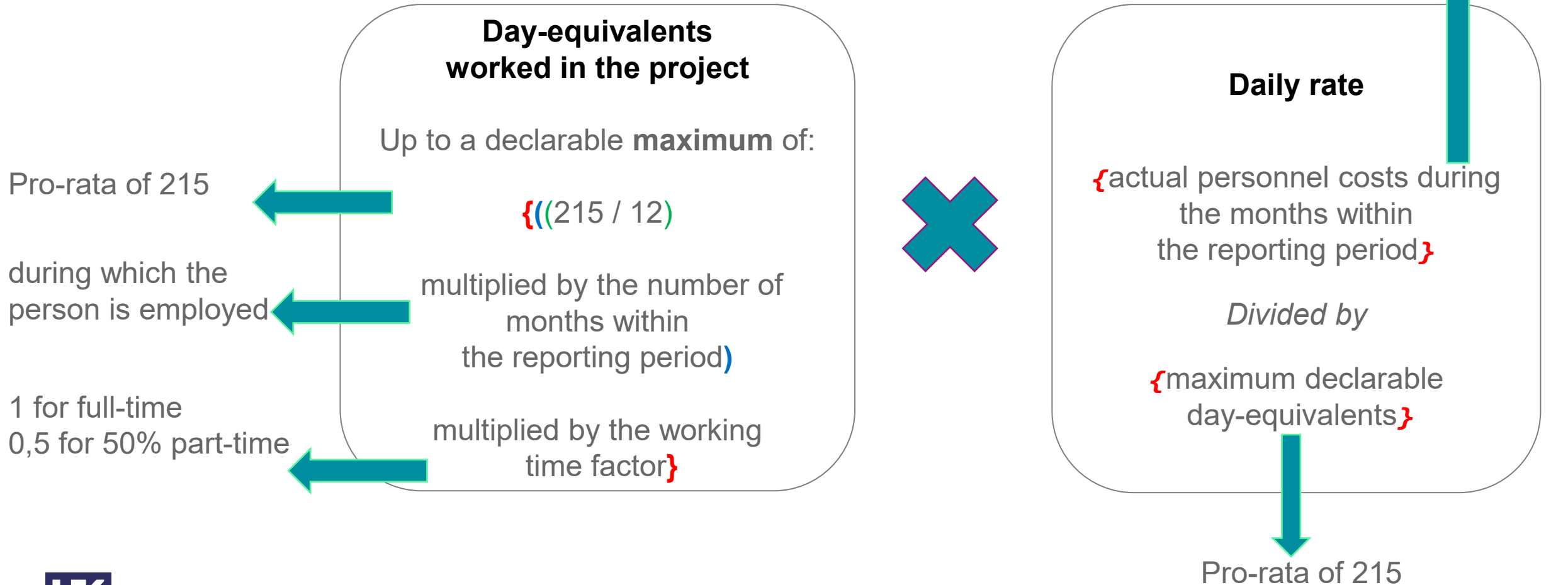


UK HE Guarantee IFS financial reporting vs HE rules

- **What are your so far experiences with the IFS reporting?**
 - institutional practice with reporting on collaborative projects (methods of reconciliation of costs for UKRI reporting periods; expenditure evidence)
 - examples of encountered issues or rejected costs / positive feedback
 - approaches to internal invoicing - HE wider reliance on the beneficiary's usual accounting practices for the unit costs calculation: actuals or cost drivers allowed
 - Personnel costs - institutional practices with the new HE daily rates methodology (conversion process for time recording system in hours, record-keeping)



Personnel costs in Horizon Europe



Agenda

10:00 - 10:05 **Welcome,**

10:05 - 10:55 **Plenary session**

Summary of the MSCA Focus Group, Malgorzata Czerwiec, UKRO

Update on the Guarantee with Q&A time with UKRI,

Introduction to discussion topics, UKRO

10:55 - 11:00 Comfort break

11:00 - 11:40 **ELO group discussions**

11:40 - 11:50 **Feedback session**

11:50 - 12:00 **Event close**



UK Research Office
Brussels

Feedback session



UK Research Office
Brussels



UK Research Office
Brussels

Thank you



@_UKRO_



UK Research Office (UKRO)

