EUROPEAN UNION

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The tutorial video relating to these slides is accessible from the EDF webpage

Detailed budget tables

Tutorial

DG DEFIS unit A2
EDF Implementation:
Programming and SME support

European Commission | DEFIS

What you will learn in this tutorial

- General information and recommendations on the *Detailed budget tables*

- Step-by-step use of the RA table

- Step-by-step use of the DA table

- Step-by-step use of the LS-RA table

- Step-by-step use of the LS-DA table

Use video chapters to go directly to your section(s) of interest!

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General information and recommendations on the *Detailed budget tables* (1/3)

- **Mandatory annex*** to be provided as part of any application to EDF calls for proposals

  - <u>1 single file</u> with all estimated costs for your entire project → see dedicated Tutorial on cost categories!

  - a part of the final content will have to be recopied in the simplified budget table in Part A

- **Use provided template (mandatory) corresponding to your type of call**

  - RA, DA, LS-RA, LS-DA (see section *5. Admissibility and documents* of the Call document)

  - make sure you are using the latest version of the template

- **Macro-enabled file to handle EDF-specific features** currently not available inside Commission IT system

  - e.g. complex funding rates, info on cross-border participation, subcontractors, actual indirect costs

  - designed to be as user friendly as possible despite complexity of the EDF

General information and recommendations on the *Detailed budget tables* (2/3)

- Before using the table, make sure:
    - template is saved in a folder where you have read/write access rights
    - **macros are authorised and enabled** → ask for your local IT support if need be
    - for users of Excel for Office 365 or later: **option "optimise for compatibility" is activated**
- **Start testing templates as soon as possible!**
    - do not wait for the last moment
    - inform us swiftly of any bug that you detect (DEFIS-EDF-PROPOSALS@ec.europa.eu)
- Follow guidance in **INSTRUCTIONS** sheet and make sure you go to the end of the **Validation & Export** process
    - provide the resulting .xlsx and .pdf files with your application (not the .xlsm file)
    - **if you need to perform updates, revert to the .xlsm file**, make your changes there and press Validation & Export again

General information and recommendations on the *Detailed budget tables* (3/3)

- Before filling-in form, **all members of the consortium, affiliated entities, subcontractors involved in the action and associated partners** must:
  - register in the Participants portal to get a PIC → see dedicated Tutorial!
  - perform, if they are claiming the SME or mid-cap status, the SME self-assessment → see dedicated Tutorial!

- Beneficiaries (BE) and affiliated entities (AE) opting for **actual indirect costs** must:
  - anticipate the need to provide their *Actual indirect cost methodology declaration* (signed by national authorities) → see dedicated Tutorial!
  - check in advance the impact of the amount claimed on the bonus calculation and maximum eligible EU contribution
  - amounts must be the same in the *Detailed budget table* and in the *Actual indirect cost methodology declarations*

Live demo

- Step-by-step use of the RA table

Live demo

- **Step-by-step use of the DA table**

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Live demo

- Step-by-step use of the LS-RA table

Live demo

- **Step-by-step use of the LS-DA table**