



Task Specification in IMS

Admin control

Emilia Genangeli, Linda Grella,
Petra Haucke, Matti Oron-Carl

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1. Periodic budget control of approved TS
2. Admin check list for allocated resources
3. TS various issues
4. FAQ
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- Admin will perform **periodic checks of TS approved** in IMS:
 - Once a month in the period April-June 2021
 - Quarterly for budget updates to be submitted to GA
- Checks of TS batches will be done in parallel also by the PMO
- In case of mistakes or changes the TS shall be put back to draft (by sys-admin)
- Approval cycle of the modified TS shall start again

Admin check list for allocated resources (1)



Items to be checked from MBT/deliverable details:

- deliverables assigned on WBS level 3
- no deliverables without resources
- PM funding rates correctly selected
- no PM without salary rates
 - Issues with PM resources “covered by other means”: to be avoided in the future or to be fixed/clarified (?)
- Resources for Accompanying Research correctly allocated
- Check salary rates against Beneficiary/AE Industry

Admin check list for allocated resources (2)



- correct sub-categories used:
 - general sanity check;
 - sample deliverables for detailed check on all costs categories with focus on non-standard funding rates, e.g.:
 - PM @70%, 100%
 - Eq./OGS @50%, 70%, 80%, 100%
 - Subcontracting @100%
 - Facilities type
- List of facilities under review, in particular THUB
- Facilities Database to be created with revised EUROfusion share per WP, costs review, schedule.
- Link to IMS sub-categories list <https://idm.euro-fusion.org/?uid=2PHSWX&version=v1.1>

Admin check list for allocated resources (3)



➤ Mission/secondments resources:

- Planned Mission Budget (PMB) in line with missions resources in IR (entered by Sys-admin) – changes to PMB to be eventually agreed later in 2021
- Resources stay not allocated; they will be automatically allocated to Beneficiaries following approval of missions
 - [Guidelines on Mission approval by PLs to be issued](#)
- Secondments centrally managed by PMU: mission application in IMS required for allocation of resources to beneficiaries

For secondments: Commission Decision authorising the use of unit costs for mobility in co-fund actions under the Research and Training Programme of the European Atomic Energy Community (2021-2025)

<https://idm.euro-fusion.org/?uid=2PJYR>

<https://idm.euro-fusion.org/?uid=2NQZ6F>

Admin check list for allocated resources (4)



- Not Allocated resources:
 - Full budget shall be in line with IR budget
 - Creation of TS/Deliverables with not allocated resources (called TBD)
 - PM resources not allocated calculated with average salary rate 75k€ (78k€ Industry)
- Add-on: Resources for specific actions should not be allocated yet. GA decision for overbid (table to be distributed by Admin)
- When data in IMS will be sufficiently complete, the total budget per Beneficiary/cost category will be checked against the Indicative Resources (Indicative budget approved by GA). Interaction with PLs/PSO to understand and eventually justify deviations.



- Sys-admin cannot be a **Deliverable Owner** (DO). DO shall be a beneficiary
- **Multi-year task**: possible, however each year when entering the TS, the task shall be put back to draft. One task/year would be preferable
- **Multi-year deliverable**: payment can be done only in year N+1 of the end date of the deliverable
- **Multi-beneficiary deliverable**: possible, however it should be taken into account that if a beneficiary is in delay, the achievement of the deliverable and also the payment for the other beneficiaries who delivered on time is delayed.



- **Description of items in Deliverable tab**

The detailed list of the following items, with associated resources per Beneficiary, shall be included in Annex 1B to the Grant Agreement. Therefore, periodically Admin shall be able to extract the information from IMS.

- **Equipment:** e.g. Computer, microscope, pump etc.
- **Other goods and services:** consumables (gas, raw material etc.), scope of the service contract
- **Subcontracting:** scope of the subcontracting



- The TS process is described in <https://idm.euro-fusion.org/?uid=2P8CDM&version=v1.1>
(still under review)
- Exception for :
WPTE and WPW7X Initiator of TS/Deliverables for ENH and operation of tokamak/stellarator is FSD CO in consultation with Admin and facility operator
- Inform budget-control@euro-fusion.org when all TSs for your WP are in IMS
- Deadline (?) Please aim to have 2021 TS in IMS by Mid-May



- Within the same Beneficiary, is it possible to change cost (sub-) category? (i.e. Equipment to PM, or Eq 40% to Eq 70%)

Strictly speaking the answer would be NO, as the categories have a different funding. Moving resources from equipment @40% to PM would reduce the EC contribution expected. Therefore the budget transfer should be not only very well justified but also a balance in the internal funding percentage should be found (PCR process to be revised) => PEP revision => PB approval

- Is it possible to move resources between different years for the same Beneficiary (i.e. part of 2021 budget moved to 2022 or vice versa)?

Yes, if justified and done in due time, i.e. the transfer should not be done retroactively => PEP revision => PB approval



- Is it possible to move resources between different Beneficiaries in the same year?

Yes, if justified and if there is agreement between the beneficiaries => PEP revision => PB approval

- What happens if a deliverable is in delay?

Deliverables in delay are normal business unfortunately. If monitored closely it will be possible to identify the deliverables that are in delay and transfer the budget to the following year. Again this shall not be done retroactively.

- Is it possible to create Deliverables for trainees work in WPs other than TRED?

Trainees are supported 100% under WPTRED; no deliverables without resources in other WPs but... issue to be addressed as for “PM covered by other means”

Internal Funding Rules (1)



- In December 2020 the General Assembly approved the Internal Funding rates to be adopted by the EUROfusion Consortium in Horizon Europe. (*EUROFUSION GA (20) 32 3.8 - Internal Funding Rules in FP9 - Issue 2 - 10-12 2020 (Decision)*)
- The rates have been used for the preparation of the grant proposal and budget plan 2021-2025.
- The Internal Funding rules will constitute **Attachment 4 to the new Consortium Agreement.**

<https://idm.euro-fusion.org/?uid=2PK4M5>



Overview changes:

- Following the release of the draft Model Grant Agreement for HE, **the costs categories have been adapted to the new definitions in the MGA.**
- A new funding rate is proposed for the costs related to the **operation of JET** (44%)
- Introduced reference to Commission Decision regulating the mobility
- Ineligible costs to be reimbursed internally
 - Costs European School Munich
 - Negative interests
 - PMU host support ineligible costs

(All funding rates are in IMS)

