



## Working with Europe

Supporting the creation of innovative projects and partnerships across Europe  
[www.workingwitheurope.com](http://www.workingwitheurope.com)

# Working with Europe Budget Tools Collection

## Intro

For many professionals across Europe creating budgets for the applications is the most problematic part of the work.

Of course, some larger organisations have experts, and our budget tools are not for them - they have their own tools, perhaps even better than ours ☺

But still, for most professionals creating budgets is a headache.  
And creating quality budget even worse...

This is *Working with Europe* has created fully programmed budget creation tools for Erasmus+ and Horizon applications.

We are not budget experts, but we believe the tools are quite valuable and provide project managers and other professionals with what they need.

In fact, working with these tools makes you able to present exactly the financial information you need to fill in the applications, and at the same time offers you a full and solid overview of project resources and project structures.

Presenting budget information in the application is easy - once you have the needed information!

The problem is to CREATE the budgets and the different parts of the budget - without spending days or weeks.

The *Working with Europe* budget tools allows you precisely to “play with” and experiment with the creation of the partner and projects budgets until you arrive at what you need. You can do this because the tools are fully programmed; you simply have to insert certain information.

In principle everybody can do this - you just need a little bit of training in the Excel program, but not much.

In fact you can use the budget tools to train your budget and Excel skills in a relevant way, as you are working on your own project missions!

More trained Excel people can, of course, use the budget tools to create further features or to adjust the tools to other needs than originally intended.

Or simply to make the tools better!

Should you discover small errors - that sometimes sneak in when managing thousands of numbers, you simply send the tool to us, explain the problem and ask us to solve it and return the tool to you. That is it.

Of course *Working with Europe* has invested a lot of time in those tools, and of course we need to benefit from that in some way.

It goes like this:

- all users will have to sign an agreement only to use the tools in their own organisation and linked to specific and defined applications
- applications in which *Working with Europe* participates can use the tools for free, but must still sign the agreement
- other organisations will sign the agreement and will be charged with 200-500 euro for respectively the Erasmus+ and Horizon tools (and can use the tools for several applications, as long as they are identified in the agreement)

Below we present the different tools.

*We are open to develop budget tools for other EU programs; however that will need to be negotiated in each specific case.*

Agreement and terms of use can be negotiated with and managed by  
Mireia Masgrau on [mireiamasgrau@gmail.com](mailto:mireiamasgrau@gmail.com)

## Erasmus+ budget tool

	P 1 Coord	P 2	P 3	P 4	P 5	P 6	P 7	P 8	P 9	P 10	TOTALS
Partner number											
Partner name	P name	P name	P name	P name	P name	P name	P name	P name	P name	P name	
Partner covering											
Project Management and Implementation											0

The Erasmus+ budget tool is fully programmed and allows you to construct a full project budget with up to 10 partners and 10 Intellectual Outputs.

The tool offers all the information you need to insert in the application form, along with a precise overview of resources in the project and resources allocated to different partners.

You need to base the budget creation on the rules and regulations of the Erasmus+ program.

The budget is not only valuable in the application process, but also to the management of the project.

The most valuable thing about the tool is not the systematic budget creation, but the fact that it allows you to “play” with the numbers, until you reach your final budget.

## HORIZON Budget 15x15 tool

	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	P13	P14	P15	TOTALS
STAFF COSTS																
WP 1 - NAME																
Number of staff months																0
Price per staff month																0
Total staff cost WP 1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

This tool allows you to create a total Horizon budget and a full overview of the financial resources and their allocation.

The tool allows for up to 15 partners and 15 work packages.

The tool needs information, of course, and this information can be created in the other Horizon budget tools, provided in the Working with Europe Horizon budget package.

Budget tools must always be adjusted to possible specific requests in different Calls and to possible adjustments to the program's rules and regulations.

## HORIZON Budget 20x15 tool

	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	P13	P14	P15	P16	P17	P18	P19	P20	TOTALS
STAFF COSTS																					
WP 1 - NAME																					
Number of staff months																					0
Price per staff month																					0
Total staff cost WP 1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

This tool allows you to create a total Horizon budget and a full overview of the financial resources and their allocation.

The tool allows for up to 20 partners and 15 work packages.

The tool needs information, of course, and this information can be created in the other Horizon budget tools, provided in the Working with Europe Horizon budget package.

Budget tools must always be adjusted to possible specific requests in different Calls and to possible adjustments to the program's rules and regulations.

## HORIZON Partner Budget tool

A	B	C	D	E	F	G	H	I	J	K	L	M
	NAME - P 1			[EXAMPLE]								
	Calculation of partner work months for work packages											
	Partner grant target			125.000		Staff direct	100.000	FILL IN				
	Partner average monthly salary	3000				Transfer/other	0	[Auto-transferred]				
						Total costs	100000					
						Overhead	25000					
						TOTAL	125000					
	Partner travel	0		[Auto-transferred] from below								
	Partner other	0		[Manually]								
	Partner direct other total costs	0										
	Total euro available for work months			100.000								
	Number of work months available for WP's			33								

In this budget tool you can create a partner budget for each partner - and experiment until you are satisfied.

As long as you work in copies of this Excel document, you can play with the numbers any way you like, but remember to save the original document.

In sheet 1 you will find a simple overview over your targeted budget for each partner. You need to know this to try to create the individual partner budget, of course.

In sheet 2 you will find 3 tools for creating the partner budget - this one for partner 1.

You can copy this sheet into as many sheets you need to cover all partners.

In each partner sheet you will find 3 small tools. These tools create information you need to feed into the overall project budget.

### Calculation of partner work months for work packages

The aim of this tool is to calculate - based on a set and decided partner budget level - how many REAL work months the partner will have in the project, and to be distributed across the work packages.

To do that we need to calculate how many REAL work months are left after subtracting travel, accommodation, and other direct costs - and overhead.

The travel and accommodation is calculated in the second tool below, based on the project's work program and transnational participation.

You insert the average full monthly salary of the partner and the various total direct costs. The overhead is calculated from this information, and the result is the available REAL work months for this partner.

Of course the calculated work months need to be distributed among several professionals, but this is not relevant to the application budget.

### Calculation of partner travel

In this tool, you calculate the partner's transnational participation costs, based on the project's work program and transnational participation decisions.

The results are automatically transferred to tool 1.

### Calculation of partner work months per work package

The third tool aims to allow you to calculate in what work packages you should insert the available partner work months.

This is of course based on the partner's roles in the project, and therefore in the work packages.

You do this by inserting a % of the full partner resources in each work package, to indicate the level of participation in this work package - for example 10% in one and 30% in another.

In this way you can allocate partner work months into the application work packages.

You can do the same for all partners by copying sheet 2 for each partner.

## HORIZON partner involvement decision making tool

The screenshot shows a spreadsheet titled "Horizon partner involvement decision making tool" with a subtitle "© Working with Europe 2015". It features a logo for "WORKING WITH EUROPE 6-55211254". The spreadsheet is organized into columns for project information and partner involvement. Key sections include:

- Project Information:** PROJECT NAME (columns G-M).
- Partner Involvement:** A table with columns for partner names (P1-P10) and countries (P name Country).
- WP NR WP SHORT NAME:** A section for work package details.
- Partner level involvement %:** A section for calculating partner involvement percentages.
- TRANS EVENT SHORT NAME(S):** A section for transnational events.
- NR(s):** A section for network roles.
- Partner involvement (0-X persons):** A section for specifying the number of persons involved.

This tool is not really a calculation tool, but a decision-making tool.

To feed information into for example the Work Months Allocation tool and the general budget, you need to make decisions on at least two things:

- To what extent are the partners involved in the different work packages?
- What are the travel costs of each partner in the work packages in which transnational activity occurs?

These are the decisions you can make in this tool - at the same time creating a full overview over these very important information at project level.

As always the information to create must be based on a set partner budget level target - we need to know the approximate share of the partner budget in the full project budget.

## HORIZON transnational participation and costs tool

The screenshot shows a spreadsheet titled "Horizon Transnational Budget tool" with a subtitle "Working with Europe 2015". It features a logo for "WORKING WITH EUROPE 6-55211254" and a "HORIZON 2020" banner. The spreadsheet is organized into columns for project information and transnational participation. Key sections include:

- Project Information:** PROJECT NAME (columns G-M).
- Transnational Participation:** A table with columns for partner names (P1-P16) and countries (P name Country).
- Transnational Events:** A section for transnational events.
- Travel Costs:** A section for travel costs.
- Accommodation Costs:** A section for accommodation costs.
- Total costs:** A section for total costs.

In this tool you can calculate and get a full overview over the project's and each partner's participation in transnational events and travel and accommodation costs.

This information is important to other budget tools and to filling in the overall Horizon budget in the application.

The tool covers up to 15 transnational events for up to 16 partners.

Of course, you need at project level to decide on:

- The average travel costs per person per travel in the budget
- The average accommodation costs per person and per night

You need to insert this information in the tool, but it can easily be copied across the tool.



## Horizon Allocation of work months tool

T17		PROJECT NAME															
Horizon Allocation of work months tool © Working with Europe 2015		HORIZON 2020															
INFO		P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	P13	P14	P15	P16
		Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame
		Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country
Total work months available (transferred manually)																	
WP NR																	
Brief description																	
WP 1																	
% involvement (input)		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
WP allocation		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
WP allocation																	
		P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	P13	P14	P15	P16
		Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame	Frame
		Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country	Country

This tool helps you allocate the proper resources to the work packages - based on the REAL and ACTUAL number of available work months for each partner.

The number of REAL work months is calculated in the Partner Budget tool and should be transferred manually to this tool, as indicated in the tool.

REAL work months means that travel, accommodation, other direct costs and overhead have been removed from what will be the total and final partner budget.

Based on the available work months for each partner, you can play with different forms of allocation of partner resources to the work packages until you reach a solution that satisfies you.

At the same time, of course, the tool offers you a full overview of human resources in the project - by partner and by work package.



*Why let budgets give you a headache?*