EDIRE Toolkit: Templates and tools for Project Design and Management

Milestone 7: Templates and tools for project design and management ready

EDIRE HorizonEurope project number:

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This document serves as a comprehensive guide to essential templates, tools, and resources designed to support stakeholders in the development, implementation, and evaluation of research and innovation projects within the EDIRE initiative and beyond. With a focus on gender equality, inclusion, accessibility, and ethical considerations, this guide empowers project teams to align with European and global standards while achieving high-impact outcomes.

About the Project:

*Equality, Diversity, and Inclusion for research enhancement (**EDIRE**) in Bosnia and Herzegovina* aims to create a networking collaboration between the University Sarajevo School of Science and Technology (**SSST**) and four renowned research institutions in France, Italy, Ireland, and Spain, with the final aim of increasing SSST research profile, boosting its research capacity, especially in the field of **E**quality, **D**iversity, and **I**nclusion (**EDI**).

Research on EDI is almost totally unaddressed in Bosnia and Herzegovina, therefore EDIRE will contribute to introducing new lines of research in such strategic topics for the quality of research. These transversal research areas will be embedded in intensive training and networking actions addressing SSST research and management capacity in general.

List of templates and tools

1. Roadmap for preparing project proposals

2. How to guide (with screenshots from AGA)

3. Partners' selection – tips

4. Examples of a Gantt chart

5. Example of a Pert chart

6. Budget sheet – examples

7. Timesheet examples - from the GA and others

8. Digital accessibility: following EU requirements

   (https://www.siteimprove.com/blog/the-eu-web-accessibility-directive-faq/;

9. Web Content Accessibility Guidelines (WCAG) 2.1, for project websites, online platforms, or digital tools. https://www.w3.org/TR/WCAG21/

10. Logical framework (logframe) template (numerous resources online)

    https://www.theguardian.com/global-development-professionals-network/2015/aug/17/how-to-write-a-logframe-a-beginners-guide;

11. Risk register template (numerous resources online)

    https://thedigitalprojectmanager.com/download/risk-register-template/

12. EDI as a pervasive dimension

13. Gender in research and project construction GenderX

14. Ethics and AI in a research and innovation project

1. Roadmap for Preparing Project Proposals

A detailed roadmap that outlines each phase of proposal development: from ideation, partner engagement, stakeholder mapping, and aligning with EU priorities, to preparing deliverables and submission. This tool helps in organizing the timeline and strategic steps to ensure timely and high-quality applications.

When forming your project consortium, pay close attention to the eligibility criteria outlined in the specific call, particularly those related to the geographical distribution of partner institutions. Collaborations that include institutions from both the European Union and the Western Balkans—or even beyond Europe—can significantly enhance your proposal's competitiveness by earning additional evaluation points. Please be aware that almost all programmes have additional criteria, which may broaden or narrow the group of entities that can apply. Some programmes are open to participants from the entire world (e.g., Horizon Europe), while others are specifically restricted to EU countries only (e.g., EDF).

Moreover, ensure that gender balance is considered in the selection of consortium representatives, as this is often a critical component in line with European values and project assessment criteria and please follow next steps:

- Establish the consortium

- Identify the writing team from each partner

- Think of the contribution and competences to add in the proposal

- Willingness to lead a Work Package

- Think of the specific activities to include

- Initiate internal procedures and CA/NDA

- Initiate writing

This guide supports project developers in shaping a solid idea into a compelling project concept. It includes strategies to match project ideas with suitable calls, as well as insights into innovation potential, societal relevance, and alignment with SDGs and Horizon Europe missions.

Includes links to European Commission portals, national funding bodies, and thematic platforms. Updated frequently to reflect available calls in research, education, and innovation. The advertisement section helps teams disseminate opportunities to interested partners.

2. How-to Guide (with AGA Screenshots)

Screenshots and instructions from the Annotated Grant Agreement (AGA) portal provide users with practical insights into submission procedures, cost eligibility, budgeting structure, and compliance requirements. Useful for both newcomers and experienced applicants.

It is very important to follow next steps such as:

- Find Grants Procedures

- Find partners

- Create an EU Login Account

- Register and Organisation to get PIC Number

- Sumbit your Grant Proposal

IMPORTANT NOTICE

The **AGA — Annotated Grant Agreement** is a **user guide** that aims to explain to **applicants** and **beneficiaries** the EU Model Grant Agreements for the EU funding programmes 2021-2027.

Programme specificities are reflected in this document as examples — in so far as they are accepted as mainstream solutions that can be used by several EU programmes.

The purpose of this document is to help users understand and interpret their Grant Agreements (GAs). By avoiding technical vocabulary, legal references and jargon, it seeks to help readers find answers to the practical questions they may come across when setting-up or implementing their projects.

In the same spirit, the document's structure mirrors that of the EU Model Grant Agreements (MGAs). It explains each MGA Article and includes examples where appropriate.

Since all EU MGAs are derived from the same basic model (EU General Model Grant Agreement), the AGA **focuses** mainly on this model. Other types of grants will be gradually covered by separate guidance, in order to be able to cover all specificities, not only the specific explanations on the contractual text.

Our approach

1. The **text** of the **article** appears in a grey text box — to differentiate it from the annotations.

   The **concepts** that are annotated are in bold and underlined.

   The annotations to the article are immediately underneath.

   Long articles are split into different parts, so the annotations can be placed below the relevant parts.

   Examples are in green.

   Lists are in red.

   Specific cases and **exceptions** are in orange.

   Programme-specific cases are in purple.

   New explanations (compared to the last AGA update) will be marked with: ■ (as from V1.0; not applicable for the draft versions)

   New rules that do not apply to all signed Grant Agreements (but instead only to those signed after a certain version, e.g. version 3.0), will be marked with: [3.0▸] and [3.0▸▸]

2. As the AGA intends to be comprehensive, it will cover all possible **options** envisaged in the EU MGAs.

Many of these options may not be relevant to your grant (and will not appear in the Grant Agreement you sign, or will be marked 'not applicable'). The chosen options will be summarised in the Data Sheet of your Grant Agreement.

Versioning

The AGA will be managed as a stable corporate document with versions. Older versions will be accessible through hyperlinks in the History of Changes table.

Other information

The AGA is limited to the provisions of the EU Model Grant Agreements. For a more general overview of how EU grants work, *see the Online Manual and the programme-specific guidance published in the Funding & Tenders Portal Reference Documents*.

The Portal Reference Documents also contain a comprehensive list of all other reference documents, for each EU programme (including legislation, work programme and templates).

Terms are explained in the Funding & Tenders Portal Glossary.

3. How to set up your project — Consortium composition and roles and responsibilities

Capacity to successfully carry out the project:

The Financial Regulation requires that beneficiaries must have the technical and financial resources needed to carry out their projects ('operational and financial capacity')[3].

This assessment is project-specific (and the outcome may accordingly vary between calls, depending on the complexity and nature of the action). What will be checked is if the participants have sufficient operational and financial capacity to carry out the proposed action.

The sufficient capacity must be demonstrated in the proposal and be available at the moment of the implementation of the work (i.e. not necessarily already at the moment of submitting the proposal or signing the GA, but at least when the work starts). In order to give sufficient assurance, proposals should show how the resources will be made available when they are needed.

Examples (acceptable):
1. For an innovative technology call, a Start-up company with no resources at the time of proposal submission, but with a credible business plan described in the application.
2. SME which, if it gets the grant, plans to double its capacity/staff.

Examples (not acceptable):
1. Consultancy company which submits a proposal where the majority of the work is subcontracted.

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[2]   *See Article 183(3) and 125 Financial Regulation 2024/2509 [old Financial Regulation: Article 180(3) and 125 Financial Regulation 2018/1046].*
[3]   *See Article 201 Financial Regulation 2024/2509 [old Financial Regulation: Article 198 Financial Regulation 2018/1046].*

This table gives an overview of the different kinds of EU grants participants and indicates cost eligibility (not exhaustive):

TYPE	Can implement 'action tasks' on its own?*	What is eligible for the beneficiary/ affiliated entity?*	Must be identified in Annex 1 GA?*	Conditions for participation*	Grant Agreement article
Beneficiaries	YES	Costs	YES	Must be eligible	Article 7
Affiliated entities	YES	Costs	YES	Must have a link (e.g. capital or legal link) with a beneficiary and fulfil the same eligibility conditions	Article 8
Associated partners	YES	n/a	YES	No specific conditions (Aps do not receive funding).	Article 9.1
Third parties contributing to the project	NO (participate in the action as contributors)	n/a (exception for HE: Costs)	YES		Article 9.2
Subcontractors	YES	Invoiced price	DEPENDS (usually only subcontracted tasks; for some programmes also subcontractor name)	Must be best value for money or lowest price and no conflict of interest (plus additional conditions for some programmes)	Article 9.3
Third parties receiving financial support**	NO (participate in the action as recipients)	Amount of support given	NO (only conditions for FSTP recipients)	According to the conditions in Annex 1	Article 9.4

* Unless otherwise provided for in the call conditions.
** Only if allowed in the call conditions.

ANNOTATIONS

PREAMBLE

General > Preamble

PREAMBLE

<div style="border:1px solid #000; padding:10px;">

GRANT AGREEMENT

Project [insert number] — [insert acronym]

PREAMBLE

This **Agreement** ('the Agreement') is **between** the following parties:

on the one part,

[OPTION 1: the **European Union** ('EU'), represented by the European Commission ('European Commission' or 'granting authority'),*]*

[[OPTION 2: the **European Atomic Energy Community** ('Euratom'), represented by the European Commission ('European Commission' or 'granting authority'),*]]*

[OPTION 3 for direct management by executive agencies: the *[***European Climate, Infrastructure and Environment Executive Agency (CINEA)***] [***European Education and Culture Executive Agency (EACEA)***] [***European Research Council Executive Agency (ERCEA)***] [***European Health and Digital Executive Agency (HaDEA)***] [***European Innovation Council and SME Executive Agency (EISMEA)***] [***European Research Executive Agency (REA)***]* ('EU executive agency' or 'granting authority'), under the powers delegated by the European Commission ('European Commission'),*]*

[OPTION 4 for indirect management by EU funding bodies: [**insert name of funding body**] ('granting authority')*[,* under the powers delegated by the European Commission ('European Commission')*]]*

and

on the other part,

1. 'the coordinator':

[**COO legal name (short name)**], PIC [number], established in [legal address],

*[*and the following other beneficiaries, if they sign their 'accession form' (see Annex 3 and Article 40):

2. [**BEN legal name (short name)**], PIC [number], established in [legal address],

*[*3. **Joint Research Centre (JRC)**, PIC [number], established in RUE DE LA LOI 200, BRUSSELS 1049, Belgium,*]*

[same for each beneficiary]*]*

Unless otherwise specified, references to 'beneficiary' or 'beneficiaries' include the coordinator and affiliated entities (if any).

If only one beneficiary signs the Grant Agreement ('mono-beneficiary grant'), all provisions referring to the 'coordinator' or the 'beneficiaries' will be considered — mutatis mutandis — as referring to the beneficiary.

The parties referred to above have agreed to enter into the Agreement.

By signing the Agreement and the accession forms, the beneficiaries accept the grant and agree to implement the action under their own responsibility and in accordance with the Agreement, with all the obligations and terms and conditions it sets out.

The Agreement is composed of:

</div>

Preamble

Terms and Conditions (including Data Sheet)

Annex 1	Description of the action
Annex 2	Estimated budget for the action
Annex 2a	Additional information on unit costs and contributions (if applicable)
Annex 3	Accession forms (if applicable)
Annex 3a	Declaration on joint and several liability of affiliated entities (if applicable)
Annex 4	Model for the financial statements
Annex 5	Specific rules (if applicable)

Template published on Portal Reference Documents.

3. Partner Selection Tips

This guide provides a structured approach to identifying, assessing, and recruiting consortium partners based on thematic relevance, expertise, geographic balance, and past performance. It includes partnership agreement templates and criteria checklists. Generally, most EU funding programmes require that participants (Beneficiaries and Affiliated Entities) are:

- legal entities (public or private bodies, including international organisations)
- established in one of the eligible countries, which include:
  - EU Member States (including EU overseas countries and territories (OCTs)) eligible non-EU countries:
    - EEA countries (Iceland, Liechtenstein and Norway — if opted-in for the programme) associated countries (countries associated with the funding programme by paying a contribution — list differs for each programme)
    - Useful links:
      - https://horizoneuropencpportal.eu/sites/default/files/2022-05/guide-for-ps-tool.pdf
      - https://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/applying-for-funding/find-partners_en.htm
      - https://lelaba.eu

4. Gantt Chart Examples

Customizable templates and examples illustrate how to visually organize project activities over time. Each task includes a defined duration, responsible partner, and milestone alignment to support real-time tracking and reporting.

TIMETABLE (GANTT CHART)

Fill in the timetable below or replace it with a Gantt chart, respecting the minimum requirements presented below.
Use the project month numbers in addition to calendar months. Month 1 marks always the start of the project. Indicate the timing of each task per work package. Repeat lines/columns as necessary. Adjust the name of the months according to the start month of your project.
For the periodic report, show the agreed timeline (as provided by the Grant Agreement in force) in grey and the updated timeline in green.
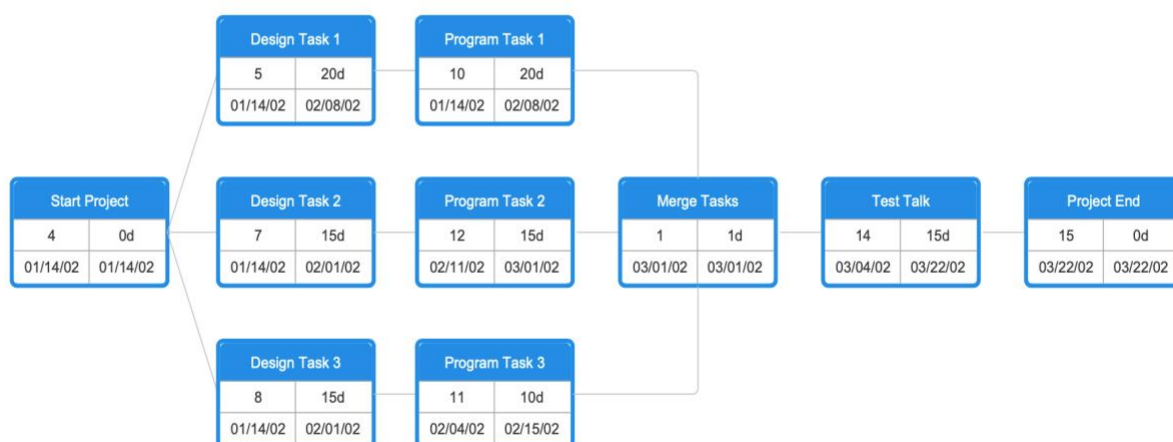*For more complex projects, additional breakdown per sub-tasks and/or beneficiary is recommended.*
Indicate milestones on the timeline, marking those on critical path in red.)

	[Project name]	2021		2022												2023					
		Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Dec	May	Jun
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
WP1	**TITLE Work Package1**																				
T1.1	Title – task 1.1	M 1							M2												
T1.2	Title – task 1.2					M3															
WP2	**TITLE Work Package2**																				
T2.1	Title – task 2.1									M4											
T2.2	Title – task 2.2						M5							M 6							
T2.3	Title – task 2.3																	M7			
WP3	**TITLE Work Package3**																				
T3.1	Title – task 3.1						M9														
T3.2	Title – task 3.2										M10										
T3.3	Title – task 3.3				M11				M12												
T3.4	Title – task 3.4													M14				M15			
T3.4.1	Title sub-task 3.4.1																				
T3.4.2	Title sub-task 3.4.2																				

5. PERT Chart Examples

Program Evaluation and Review Technique (PERT) charts help in analyzing task dependencies and scheduling. The provided examples enable teams to manage complex projects with parallel tasks and contingency planning.

Design Task 1	
5	20d
01/14/02	02/08/02

Program Task 1	
10	20d
01/14/02	02/08/02

Start Project	
4	0d
01/14/02	01/14/02

Design Task 2	
7	15d
01/14/02	02/01/02

Program Task 2	
12	15d
02/11/02	03/01/02

Merge Tasks	
1	1d
03/01/02	03/01/02

Test Talk	
14	15d
03/04/02	03/22/02

Project End	
15	0d
03/22/02	03/22/02

Design Task 3	
8	15d
01/14/02	02/01/02

Program Task 3	
11	10d
02/04/02	02/15/02

6. Budget Sheet Examples

Ready-to-use Excel templates to create and manage project budgets, categorize direct and indirect costs, and forecast financial needs. Based on Horizon Europe financial rules, these sheets ensure consistency and transparency in budget planning.

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FINANCIAL STATEMENT FOR [PARTICIPANT NAME FOR DISSEMINATION, PLEASE SPECIFY]

7. Timesheet Samples

Templates based on EU project standards (e.g., Horizon Europe GA) to track working hours of staff involved in the project. Includes instructions for electronic and paper versions with audit-compliant formats.

TIME RECORDING FOR A HORIZON EUROPE ACTION - EDIRE Project 101060145																																Month		Year	
Beneficiary´s / third party's name																																				

Person working in the action

| Name of the person | | | | | | | | | | | | | | | | | | | Type of personnel (see art. …. GA) | | | | | | | | | | | | | | | | |

DAY	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	Σ
Title of the Action (Acronym)																																
WP 1																																0
WP 2																																0
WP 3																																0
WP 4																																0
WP 5																																0
WP 6																																0
WP 7																																0
WP 8																																0
WP 9																																0
WP 10																																0
Total Σ Hours	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Σ Days	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Research activity on other reported projects:																																0
Other Research Activities																																0
Teaching																																0
Other Institutional Activities																																0

Total Σ Hours   0

Total Σ Days   0

Signed (Name of the person):		Signed (Name of the supervisor):	
Date:		Date:	
Signature:		Signature:	

8. Digital Accessibility Compliance

The toolkit includes guidance to ensure websites, platforms, and documents are accessible for all users, especially persons with disabilities. Follow the European Web Accessibility Directive with resources like: SiteImprove: EU Accessibility Directive FAQ

9. WCAG 2.1 Guidelines

The Web Content Accessibility Guidelines (WCAG) 2.1 by W3C help create inclusive digital tools. Projects must ensure that any public-facing digital product meets these guidelines: W3C WCAG 2.1

10. Logical Framework (Logframe) Template

A logframe is a standard planning tool to define a project's objectives, outputs, outcomes, and indicators. The guide includes:

- Narrative summary of goals
- Verifiable indicators and means of verification
- Assumptions and external factors

Recommended reading: How to write a logframe – The Guardian

11. Risk Register Template

A downloadable Excel template to help teams identify, assess, and mitigate project risks. Each risk includes probability, impact, mitigation strategies, and responsible actors: Risk Register Template

12. EDI (Equity, Diversity & Inclusion) as a Pervasive Dimension

Strategies and templates to integrate EDI throughout the project cycle—from recruitment, team composition, and data analysis, to dissemination and policy recommendations.

Please watch this useful EDIRE trainings video:

- o Grant Writing
- o RRI, Gender and Intersectionality
- o Risks and Contingencies measures in EU Projects
- o Leadership for Equality, Diversity and Inclusion

13. Gender in Research and Project Construction

Tools to mainstream gender in project development, particularly in research content, stakeholder engagement, and institutional design. Emphasis is placed on collecting sex-disaggregated data and designing gender-transformative actions.

14. Ethics and AI in Research and Innovation Projects

Guidelines to ensure the ethical development and deployment of AI technologies in research. Covers bias mitigation, explainability, consent, and accountability mechanisms in line with EU values and the Horizon Europe Ethics Appraisal Procedure.

- o Outline a plan to address ethical issues and AI in your proposal/project.
- o Detail the steps for ethics and AI, identifying potential barriers/risks.
- o Analyze legal issues (national and EU) and technology accessibility.

- o Address AI's environmental challenges: energy use, carbon footprint, resources, biodiversity loss, transparency, and sustainability.
- o Aim to create sustainable AI systems that prioritize human and environmental well-being.

CONCLUSION

This EDIRE Toolkit empowers organizations, researchers, and managers to build innovative, inclusive, and ethically sound projects aligned with European and global standards. Whether you're starting with a concept note or finalizing a deliverable, these tools serve as a reliable companion for high-quality project outcomes and sustainable impact.

For updates and additional resources, stay connected through the EDIRE communication channels.