



# Lump Sum Proposals in Horizon Europe

## What evaluators really assess

Key message from the Commission:

Lump sum simplifies reporting — not proposal design.

A common misconception

"Lump sum = no budget  
justification"

**Reality:**

Budget quality is still fully evaluated.

# Where budget is evaluated

In lump sum proposals:

**Cost estimations are assessed under the Implementation criterion**

**Evaluators assess feasibility, not accounting precision**

**📄 If the budget does not support the work plan → lower score.**



### Writing a lump sum proposal: detailed budget

- You need to provide **cost estimations for each cost category** per beneficiary (and affiliated entity if any) and per work package.
- The cost estimations must be an **approximation of your actual costs**. They:
  - are subject to the same eligibility rules as in actual costs grants
  - must be in line with your normal practices
  - must be reasonable / non-excessive
  - must be in line with and necessary for your proposed activities.
- The cost estimations are used to generate in the detailed budget table a **breakdown of lump sum shares** per work package and per participant.



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# What evaluators check

Experts assess whether:

Cost estimations are reasonable

Costs are non-excessive

Resources allow completion of planned activities

Clear over- or under-estimation leads to penalties under Implementation.

# Cost estimations still matter

When writing a lump sum proposal:

- Cost estimations must approximate actual costs
- Same eligibility logic as actual-cost grants
- Must reflect normal practices
- Must be necessary for the proposed activities

**Lump sum ≠ invented numbers.**



# Work Packages and payment logic

## Payment structure

One lump sum share is fixed per Work Package and triggered when it's completed.



### Important:

Payments depend on completed activities—not on successful results.



# What "completed" really means

**If:**

All planned activities were carried out



**Then:**

The Work Package is considered completed

**Even if scientific or technical targets were not fully achieved.**

# Designing Work Packages

- Use multiple Work Packages as needed—but keep them manageable
- Split long horizontal activities (management, dissemination) across reporting periods for intermediate payments



# Consequences for the proposal

If cost estimations are clearly misestimated:



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Implementation score is reduced



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Experts may recommend budget changes



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Lump sum amount may be adjusted in the Grant Agreement

**Good ideas still need solid structure.**

# Key takeaway

## Lump sum proposals:

- Simplify reporting
- Do NOT simplify responsibility

## Strong proposals combine:

- Clear Work Packages
- Realistic budgets
- Logical alignment

## Source

Insights from Horizon Europe / REA Info Session  
Brussels

Lump Sum Funding – Funding & Tenders Portal

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/programmes/horizon/lump-sum>



**Resources**

A dedicated [lump sum page](#) on the Funding & Tenders Portal with:

- Guidance documents**
  - What do I need to know? & Quick guide
  - Frequently asked questions
  - Detailed guidance for applicants and beneficiaries
  - Best practices for lump sum grants
  - Lump sum briefing slides for experts
  - Lump sum videos for experts and applicants
- Reference documents**
  - Model Grant Agreement Lump Sum
  - Decision authorising the use of lump sum contributions under the Horizon Europe Programme
- Events**
  - Past events and recordings
    - Lump Sum Funding in Horizon Europe: How does it work? How to write a proposal? (March 2025)
  - Future events
    - Lump Sum Funding in Horizon Europe: Quick Overview of the Main Features (June 2025)



European Commission

