

Step 2 Esf+ Application Form Template Sample

1. PROJECT IDENTIFICATION AND OVERVIEW

PROJECT	
Project title:	[remain unchanged]
Project acronym:	[remain unchanged]
Lead Applicant	[remain unchanged]
Call specific objective (if the call targets several specific objectives)	[remain unchanged]
Project duration	

1.1. PROJECT SUMMARY

Project summary
<p>Describe the followings:</p> <ul style="list-style-type: none"> • the common challenge of the sector/area you are tackling in your project; • the overall objective of the project and the expected change your project will make to the current situation; • the main outputs you will produce and those who will benefit from them; • the approach you plan to take; • what is new/original about the project.

1.2. PROJECT BUDGET OVERVIEW (automatically generated from b. project partners data)

Partner	Partner budget	Co-financing rate (%)	Total EU contribution	Own contribution	Other contribution (public)	Other contribution (private)	Total contribution
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
TOTAL	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic

1.3. PROJECT OUTPUTS AND RESULT OVERVIEW (automatically generated from 4. work plan)

Programme output indicator	Output indicator title	Measurement unit	Output indicator target value	Description	Programme result indicator	Result indicator title	Measurement unit	Result indicator target value	Description
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic	Automatic

2. PROJECT PARTNERS

PARTNERS OVERVIEW

Number	Legal Status	Name of the organisation	Organisation abbreviation	Partner role	Partner total eligible budget
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic
Automatic	Automatic	Automatic	Automatic	Automatic	Automatic

2.1. LEAD PARTNER

2.1.1. Name

Partner number
Partner role

Abbreviated name of organisation

Name of the organisation

Department /unit / division

P1
Lead Partner or Project Partner

Insert text

Insert text

If applicable, Insert text

2.1.2. Legal and financial information

Type of partner
Legal status
VAT number
Is your organisation entitled to recover VAT for the activities implemented in the project?*

Drop-down list
Drop-down list
Insert text
Drop-down list: yes/no/partly

2.1.3. Main address

Street*

Postal code*

Homepage

House number*

City*

2.1.4. Legal representative

Title

First name*

Last name*

Drop-down list (for
example: Mr, Mrs, Dr, etc.)

Insert text

Insert text

2.1.5. Contact person

Title

Drop-down list: Mr,
Mrs, Dr, etc.

First name*

Insert text

Last name*

Insert text

E-mail address*

Insert text

Telephone*

Insert text

2.1.6. Partner budget (n/a for associated partner)

Total partner budget

Own contribution

Other contribution (public)

Other contribution (private)

Insert text

2.2. PROJECT PARTNER

2.2.1. Name

Partner number

Partner role

Abbreviated name of organisation

Name of the organisation

Department /unit / division

P1

Lead Partner or Project Partner

Insert text

Insert text

If applicable, Insert text

2.2.2. Legal and financial information

Type of partner

Legal status

VAT number

Is your organisation entitled to recover VAT for the
activities implemented in the project?*

Drop-down list

Drop-down list

Insert text

Drop-down list: yes/no/partly

2.2.3. Main address

Street*

House number*

Postal code*

City*

Homepage

2.2.4. Legal representative

Title

Drop-down list (for
example: Mr, Mrs, Dr, etc.)

First name*

Insert text

Last name*

Insert text

2.2.5. Contact person

Title

*Drop-down list: Mr,
Mrs, Dr, etc.*

First name*

Insert text

Last name*

Insert text

E-mail address*

Insert text

Telephone*

Insert text

2.2.6. Partner budget (n/a for associated partner)

Total partner budget

Own contribution

Other contribution (public)

Other contribution (private)

Insert text

Repeat B.2 Project partner as B.3, B.4 etc. as many times as necessary.

3. PROJECT DESCRIPTION

3.1. RELEVANCE

3.2. Background and general objectives

Background and general objectives

Describe the background and rationale of the project.

How is the project relevant to the scope of the call? How does the project address the general objectives of the call? What is the project's contribution to the priorities of the call?

Insert text

3.3. Needs analysis and specific objectives

Needs analysis and specific objectives

Describe how the objectives of the project are based on a sound needs analysis in line with the specific objectives of the call. What issue/challenge/gap does the project aim to address?

The objectives should be clear, measurable, realistic and achievable within the duration of the project. For each objective, define appropriate indicators for measuring achievement (including a unit of measurement, baseline value and target value).

Insert text

3.3.1. Complementarity with other actions and innovation — European added value

Complementarity with other actions and innovation

Explain how the project builds on the results of past activities carried out in the field and describe its innovative aspects. Explain how the activities are complementary to other activities carried out by other organisations.

Illustrate the European dimension of the activities: trans-national dimension of the project; impact/interest for a number of EU countries; possibility to use the results in other countries, potential to develop mutual trust/cross-border cooperation among EU countries, etc.

Which countries will benefit from the project (directly and indirectly)? Where will the activities take place?

Insert text

3.4. QUALITY

3.4.1. Concept and Methodology

Concept and methodology

Outline the approach and methodology behind the project. Explain why they are the most suitable for achieving the project's objectives.

Insert text

3.4.2. Consortium Set-Up

Consortium cooperation and division of roles (if applicable)

Describe the participants (Beneficiaries, Affiliated Entities and Associated Partners, if any) and explain how they will work together to implement the project. How will they bring together the necessary expertise? How will they complement each other?

In what way does each of the participants contribute to the project? Show that each has a valid role and adequate resources to fulfil that role.

Note: *When building your consortium you should think of organisations that can help you reach objectives and solve problems.*

Insert text

3.4.3. Project Teams, Staff and Experts

Project teams and staff

Describe the project teams and how they will work together to implement the project.

List the staff included in the project budget (budget category A) by function/profile (e.g. project manager, financial manager, junior/senior expert, junior/senior advisor, trainers/, operational personnel, technical personnel, administrative personnel, communication personnel etc. and describe briefly their tasks. Provide CVs of all key actors (if required).

Name and function	Organisation	Role/tasks/professional profile and expertise

Outside resources (subcontracting, seconded staff etc)

If you do not have all skills/resources in-house, describe how you intend to get them (contributions of members, partner organisations, subcontracting, etc).

If there is subcontracting, please also complete the table in section 4.

Insert text

3.4.4. Consortium management and decision-making

Consortium management and decision-making (if applicable)

Explain the management structures and decision-making mechanisms within the consortium. Describe how decisions will be taken and how regular and effective communication will be ensured. Describe methods to ensure planning and control.

Note: *The concept (including organisational structure and decision-making mechanisms) must be adapted to the complexity and scale of the project.*

Insert text

3.4.5. Project management, quality assurance and monitoring and evaluation strategy

Project management, quality assurance and monitoring and evaluation strategy

Describe the measures planned to ensure that the project implementation is of high quality and completed in time. Describe the methods to ensure good quality, monitoring, planning and control. Describe the evaluation methods and verify the outreach and coverage of the activities and results.

Insert text

3.4.6. Cost effectiveness and financial management

Cost effectiveness and financial management (n/a for prefixed Lump Sum Grants)

Describe the measures adopted to ensure that the proposed results and objectives will be achieved in the most cost-effective way. Indicate the arrangements adopted for the financial management of the project and, in particular, how the financial resources will be allocated and managed within the consortium.

 *Do NOT compare and justify the costs of each work package, but summarize briefly why your budget is cost effective.*

Insert text

3.4.7. Risk management

Critical risks and risk management strategy

Describe critical risks, uncertainties or difficulties related to the implementation of your project, and your measures/strategy for addressing them.

Indicate for each risk (in the description) the impact and the likelihood that the risk will materialise (high, medium, low), even after taking into account the mitigating measures.

Note: *Uncertainties and unexpected events occur in all organisations, even if very well-run. The risk analysis will help you to predict issues that could delay or hinder project activities. A good risk management strategy is essential for good project management.*

Risk No	Description	Work package No	Proposed risk-mitigation measures

3.5. IMPACT

3.5.1. Impact and ambition

Impact and ambition — Progress beyond the state-of-the-art

Define the short, medium and long-term effects of the project.

Who are the target groups? How will the target groups benefit concretely from the project and what would change for them?

Does the project aim to trigger change/innovation? If so, describe them and the degree of ambition (progress beyond the status quo/state-of-the-art).

Insert text

Target groups and activities

For ESF+ actions, specify the type of target groups involved in the project activities (if applicable).

Type target groups:

1. *Migrants/refugees*
2. *Other 3rd country citizens (not migrants)*
3. *Children*
4. *Elderly people (3rd age)*
5. *Homeless*
6. *Most deprived*
7. *Marginalised communities*
8. *People in vulnerable situations*
9. *Persons with disability*
10. *Not in Education, Employment or Training (NEETs) / Inactive*
11. *Long Term Unemployed (LTU)*
12. *Self-employed and short-term contract workers (up to 6 months)*
13. *Social entrepreneurs, actors of the social economy*
14. *Micro-entrepreneurs*
15. *Social partners*
16. *Women*
17. *Workers*
18. *Other, please specify*

Target Group Type No	Description of the activity involving the target group(s)	Work Package No	Beneficiary leading this activity
No. as per above			

No. as per above			
<p><i>For ESF+ actions, specify the number of activities planned (if applicable).</i></p> <p><i>Type of activities:</i></p> <ol style="list-style-type: none"> 1. <i>Analytical activities</i> 2. <i>Information sharing and mutual learning</i> 3. <i>Number of capacity building activities and networking organised</i> 			
Activity Type No	Description of the activity	Work Package No	Beneficiary leading this activity
No. as per above			
No. as per above			

3.5.2. Communication, dissemination, and visibility

Communication, dissemination and visibility of funding

Describe the communication and dissemination activities which are planned in order to promote the activities/results and maximise the impact (to whom, which format, how many, etc.). Clarify how you will reach the target groups, relevant stakeholders, policymakers and the general public and explain the choice of the dissemination channels.

Describe how the visibility of EU funding will be ensured.

Insert text

3.5.3. Sustainability and continuation

Sustainability, long-term impact and continuation

Describe the follow-up of the project after the EU funding ends. How will the project impact be ensured and sustained?

What will need to be done? Which parts of the project should be continued or maintained? How will this be achieved? Which resources will be necessary to continue the project? How will the results be used?

Are there any possible synergies/complementarities with other (EU funded) activities that can build on the project results?

Insert text

3.5.4. Horizontal principles

Horizontal principles

Please indicate which type of contribution to horizontal principles applies to the project, and justify your choice. (Gender equality, equal opportunities and non-discrimination, as well as sustainable development based on Article 11 TFEU, taking into account the UN Sustainable Development Goals, the Paris Agreement and the "Do No Significant Harm" principle.

Insert text

3.6. WORKPLAN, WORK PACKAGES, ACTIVITIES, RESOURCES AND TIMING

3.6.1. Work plan

Work plan

Provide a brief description of the overall structure of the work plan (list of work packages or graphical presentation (Pert chart or similar)).

Insert text

3.6.2. Work packages, activities, resources, and timing

WORK PACKAGES

Work packages

This section concerns a detailed description of the project activities.

*Group your activities into work packages. **A work package means a major sub-division of the project.** For each work package, enter an objective (expected outcome) and list the activities, milestones and deliverables that belong to it. The grouping should be logical and guided by identifiable outputs.*

Projects should normally have a minimum of 2 work packages. WP1 should cover the management and coordination activities (meetings, coordination, project monitoring and evaluation, financial management, progress reports, etc) and all the activities which are cross-cutting and therefore difficult to assign to another specific work package (do not try splitting these activities across different work packages). WP2 and further WPs should be used for the other project activities. You can create as many work packages as needed by copying WP1.

For very simple projects, it is possible to use a single work package for the entire project (WP1 with the project acronym as WP name). For Operating Grants, use WP1 for 'General management and running of the organisation' and the last WP for 'Dissemination and communication'. For Lump Sum Grants, please create one work package for each lump sum component.

Work packages covering financial support to third parties (⚠ only allowed if authorised in the Call document) must describe the conditions for implementing the support (for grants: max amounts per third party; criteria for calculating the exact amounts, types of activity that qualify (closed list), persons/categories of persons to be supported and criteria and procedures for

giving support; for prizes: eligibility and award criteria, amount of the prize and payment arrangements).

⚠ Enter each activity/milestone/output/outcome/deliverable only once (under one work package).

⚠ Ensure consistence with the detailed budget table/calculator (if applicable). (n/a for prefixed Lump Sum Grants)

Objectives

List the specific objectives to which the work package is linked.

Activities and division of work (WP description)

Provide a concise overview of the work (planned tasks). Be specific and give a short name and number for each task.

Show who is participating in each task: Coordinator (COO), Beneficiaries (BEN), Affiliated Entities (AE), Associated Partners (AP), indicating **in bold** the task leader.

Add information on other participants' involvement in the project e.g. subcontractors, in-kind contributions.

Note:

In-kind contributions: In-kind contributions for free are cost-neutral, i.e. cannot be declared as cost. Please indicate the in-kind contributions that are provided in the context of the work package.

The Coordinator remains fully responsible for the coordination tasks, even if they are delegated to someone else. Coordinator tasks cannot be subcontracted.

If there is subcontracting, please also complete the table below.

Milestones and deliverables (outputs/outcomes)

Milestones are control points in the project that help to chart progress (e.g. completion of a key deliverable allowing the next phase of the work to begin). Use them only for major outputs in complex projects, otherwise leave the section empty. Please limit the number of milestones by work package.

Means of verification are how you intend to prove that a milestone has been reached. If appropriate, you can also refer to indicators.

Deliverables are project outputs which are submitted to show project progress (any format). Refer only to major outputs. Do not include minor sub-items, internal working papers, meeting minutes, etc. Limit the number of deliverables to max 10-15 for the entire project. You may be asked to further reduce the number during grant preparation.

For deliverables such as meetings, events, seminars, trainings, workshops, webinars, conferences, etc., enter each deliverable separately and provide the following in the 'Description' field: invitation, agenda, signed presence list, target group, number of estimated participants, duration of the event, report of the event, training material package, presentations, evaluation report, feedback questionnaire.

For deliverables such as manuals, toolkits, guides, reports, leaflets, brochures, training materials etc., add in the 'Description' field: format (electronic or printed), language(s), approximate number of pages and estimated number of copies of publications (if any).

For each deliverable you will have to indicate a due month by when you commit to upload it in the Portal. The due month of the deliverable cannot be outside the duration of the work package and must be in line with the timeline provided below. Month 1 marks the start of the project and all deadlines should be related to this starting date.

The labels used mean:

Public — fully open (📢 automatically posted online on the Project Results platforms)

Sensitive — limited under the conditions of the Grant Agreement

EU classified — RESTREINT-UE/EU-RESTRICTED, CONFIDENTIEL-UE/EU-CONFIDENTIAL, SECRET-UE/EU-SECRET under Decision [2015/444](#). For items classified under other rules (e.g. national or international organisation), please select the equivalent EU classification level.

Work Package 1

Work Package 1: [Name, e.g. Project management and coordination]					
Duration:	MX - MX	Lead Beneficiary:	1-Short name		
Objectives					
▪					
Activities and division of work (WP description)					
Task No (continuous numbering linked to WP)	Task Name	Description	Participants		In-kind Contributions and Subcontracting (Yes/No and which)
			Name	Role (COO, BEN, AE, AP, OTHER)	
T1.1					
T1.2					

Milestones and deliverables (outputs/outcomes)							
Milestone No (continuous numbering not linked to WP)	Milestone Name	Work Package No	Lead Beneficiary	Description		Due Date (month number)	Means of Verification
MS1		1					
MS2		1					
Deliverable No (continuous numbering linked to WP)	Deliverable Name	Work Package No	Lead Beneficiary	Type	Dissemination Level	Due Date (month number)	Description (including format and language)
D1.1		1		<i>[R — Document, report] [DEM — Demonstrator, pilot, prototype] [DEC — Websites, patent filings, videos, etc] [DATA — data sets, microdata, etc] [DMP — Data Management Plan] [ETHICS] [SECURITY] [OTHER]</i>	<i>[PU — Public] [SEN — Sensitive] [R-UE/EU-R — EU Classified] [C-UE/EU-C — EU Classified] [S-UE/EU-S — EU Classified]</i>		
D1.2		1		<i>[R — Document, report] [DEM — Demonstrator, pilot, prototype] [DEC — Websites, patent filings, videos, etc] [DATA — data sets, microdata, etc] [DMP — Data</i>	<i>[PU — Public] [SEN — Sensitive] [R-UE/EU-R — EU Classified] [C-UE/EU-C — EU Classified] [S-UE/EU-S — EU Classified]</i>		



				Management Plan] [ETHICS] / [SECURITY] [OTHER]			
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Indicators	
<i>The indicators proposed to measure progress should be relevant, realistic and measurable.</i>	
Output indicator title:	
Output indicator description:	Programme output indicator (<i>chosed from drop down list</i>)
	<i>Drop-down list</i>
Measurement unit	Target value

Result indicator title:	
Result indicator description:	Programme result indicator (<i>chosed from drop down list</i>)
	<i>Drop-down list</i>
Measurement unit	Target value

Estimated budget — Resources														
Participant	Costs													
	A. Personnel		B. Subcontracting	C.1a Travel			C.1b Accomodation	C.1c Subsistence	C.2 Equipment	C.3 Other goods, works and services	D.1 Financial support to third parties		E. Indirect costs	Total costs
[name]	X person months	X EUR	X EUR	X travels	X persons travelling	X EUR	X EUR	X EUR	X EUR	X EUR	X grants	X EUR	X EUR	X EUR
[name]	X person months	X EUR	X EUR	X travels	X persons travelling	X EUR	X EUR	X EUR	X EUR	X EUR	X prizes	X EUR	X EUR	X EUR
Total	X person months	X EUR	X EUR	X travels	X persons travelling	X EUR	X EUR	X EUR	X EUR	X EUR	X grants X prizes	X EUR	X EUR	X EUR

For Lump Sum Grants, see detailed budget table/calculator (annex 1 to Part B; see [Portal Reference Documents](#)).

Work Package ...

To insert work packages, copy WP1 as many times as necessary.

Staff effort per work package

Fill in the summary on work package information and effort per work package.

Work Package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Start Month	End Month	Person-Months
1						
2						
3						
4						
					Total Person- Months	

Staff effort per participant

Fill in the effort per work package and Beneficiary/Affiliated Entity.

Please indicate the number of person/months over the whole duration of the planned work.

Identify the work-package leader for each work package by showing the relevant person/month figure in **bold**.

Participant	WP1	WP2	WP...	Total Person-Months
[name]				
[name]				
Total Person-Months				

Subcontracting

Give details on subcontracted project tasks (if any) and explain the reasons why (as opposed to direct implementation by the Beneficiaries/Affiliated Entities).

Subcontracting — Subcontracting means the implementation of ‘action tasks’, i.e. specific tasks which are part of the EU grant and are described in Annex 1 of the Grant Agreement.

Note: Subcontracting concerns the outsourcing of a part of the project to a party outside the consortium. It is not simply about purchasing goods or services. We normally expect that the participants have sufficient operational capacity to implement the project activities themselves. Subcontracting should therefore be exceptional.

Include only subcontracts that comply with the rules (i.e. best value for money and no conflict of interest; no subcontracting of coordinator tasks).

Work Package No	Subcontract No (continuous numbering linked to WP)	Subcontract Name (subcontracted action tasks)	Description (including task number and BEN/AE to which it is linked)	Estimated Costs (EUR)	Justification (why is subcontracting necessary?)	Best-Value-for-Money (how do you intend to ensure it?)
	S1.1					
	S1.2					
Other issues: <i>If subcontracting for the project goes beyond 30% of the total eligible costs, give specific reasons.</i>			Insert text			

Timetable

Timetable (projects up to 2 years)

Fill in cells in beige to show the duration of activities. Repeat lines/columns as necessary.

Note: Use the project month numbers instead of calendar months. Month 1 marks always the start of the project. In the timeline you should indicate the timing of each activity per WP.

	MONTHS
--	---------------

ACTIVITY	M 1	M 2	M 3	M 4	M 5	M 6	M 7	M 8	M 9	M 10	M 11	M 12	M 13	M 14	M 15	M 16	M 17	M 18	M 19	M 20	M 21	M 22	M 23	M 24	
Task 1.1 - ...																									
Task 1.2 - ...																									
Task ...																									

Timetable (projects of more than 2 years)

Fill in cells in beige to show the duration of activities. Repeat lines/columns as necessary.

Note: Use actual calendar years and quarters. In the timeline you should indicate the timing of each activity per WP. You may add additional columns if your project is longer than 6 years.

ACTIVITY	YEAR 1				YEAR 2				YEAR 3				YEAR 4				YEAR 5				YEAR 6			
	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4	Q 1	Q 2	Q 3	Q 4
Task 1.1 - ...																								
Task 1.2 - ...																								
Task ...																								

3.7. OTHER

Other sections can be added according to national requirements.

ANNEXES

LIST OF ANNEXES

Standard

Detailed budget table/Calculator
CVs
Annual activity reports
List of previous projects

Special

Other annexes

LIST OF PREVIOUS PROJECTS

List of previous projects					
<i>Please provide a list of your previous projects for the last 3 years.</i>					
Participant	Project Reference No and Title, Funding programme	Period (start and end date)	Role (COO, BEN, AE, OTHER)	Amount (EUR)	Website (if any)
[name]					
[name]					