

Horizon Europe Guarantee Guidance for Grants Administered via the Joint Electronic Submission and The Funding Service

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1. Introduction

1.1. Purpose of this document

- 1.1.1. This document sets out the eligibility conditions attached to Horizon Europe Guarantee grants administered via the via the Joint Electronic Submission (Je-S) and The Funding Service (TFS), it sets out the processes for receiving funding from UKRI.
- 1.1.2. The first part of the document “UKRI Horizon Europe Guarantee: General Guidance for Applicants and Grant Holders” sets out the general eligibility conditions attached to all Horizon Europe Guarantee grants. These are general eligibility conditions.
- 1.1.3. The second part “Calls Hosted on Je-S and The Funding Service” sets out specific guidance for Horizon Europe Guarantee ERC and Marie Skłodowska-Curie Actions (MSCA) Awards.
- 1.1.4. In addition to the relevant terms and conditions the policies outlined within this guidance document form the expectations UKRI place on award holders and may be used in determining if awards have been appropriately managed and costs are eligible.
- 1.1.5. This document is regularly reviewed and updated with detailed guidance for Guarantee grant holders. Updates will be published on the UKRI website ([Apply for Horizon Europe guarantee funding](#)).

- 1.1.6. For other Horizon Europe Guarantee calls please see guidance document “UKRI Horizon Europe Guarantee Guidance: Grants Administered via the Innovation Funding Service”.

1.2. Scope of the Horizon Europe Guarantee

- 1.2.1. On 29 November 2021, the government announced a new scheme that guarantees funding for successful applicants to Horizon Europe calls regardless of the outcome of the UK’s efforts to associate to Horizon Europe.
- 1.2.2. The Guarantee is in place to address the delay in the formalisation of the UK’s association to Horizon Europe. To provide assurance, the UK government has guaranteed funding for all eligible, successful applicants to Horizon Europe calls covered within Horizon Europe 2021, 2022, and 2023 Work Programmes.
- 1.2.3. The Horizon Europe Guarantee is intended to support all UK-based Horizon Europe awardees (excluding British Overseas Territories) for excellent science, research and innovation who submitted to calls covered within Horizon Europe 2021, 2022, and 2023 work programmes who cannot sign a grant agreement with the European Commission or delegated party, because it is not covered by the UK’s bespoke association deal, and therefore cannot receive funding.
- 1.2.4. Previous versions of this guidance included a list of eligible calls in the annex, but this has been replaced by a commitment to include the Horizon Europe calls covered within work programmes 2021, 2022, and 2023 (limited exceptions exist, for further information see [Horizon Europe Calls not Covered by The Guarantee](#) or contact EUGrantsFunding@ukri.org).
- 1.2.5. Successful UK-based Horizon Europe applicants (excluding British Overseas Territories) will be eligible to register with UKRI for the Horizon Europe Guarantee if they are either:
- a UK-based organisation and a member of a consortium which has received notification of a successful proposal evaluated under a Horizon Europe call covered within 2021, 2022, and 2023 work programmes and which meets the required European Commission eligibility criteria to deliver the project
 - a UK-based organisation or researcher who has received notification of a successful proposal evaluated under a mono-beneficiary Horizon Europe call covered within 2021, 2022, and 2023 work programmes
 - a researcher who has received notification of a successful ERC proposal with a UK host institution for an ERC call covered within 2021, 2022, and 2023 work programmes
 - a researcher who has received notification of a successful ERC proposal for an ERC call covered within 2021, 2022, and 2023 work programmes with a non-UK host institution and wishes to move their grant to a UK host institution before having signed the Grant Agreement

- a researcher who has received notification of a successful ERC proposal for an ERC call covered within 2021, 2022, and 2023 work programmes with a non-UK host institution and wishes to move their grant to a UK host institution after having signed the Grant Agreement where no project spend has been incurred
- or a UK-based organisation which has carried out a project approved through usual EIT-KIC processes, and they have incurred eligible costs during the 2021, 2022, or 2023 calendar years

and

- they have applied to Horizon Europe as a beneficiary
- they are ineligible to receive funding from Horizon Europe because they were unable to sign the grant agreement as an applicant from an Associated Country due to the UK's association status not being formalised in time (as per guidance issued by the European Commission: 'Questions and Answers on the UK's Participation in Horizon Europe')
- if the UK's association had been formalised to cover the 2021, 2022, and 2023 work programmes, they would have been able to sign the grant agreement as an applicant from an Associated Country and would have received funding from Horizon Europe or a delegated party.

1.2.6. Further general requirements for the Guarantee are set out in this guidance and Horizon Europe call specific requirements can be found in the relevant call guidance document.

1.2.7. The UK remains a full member of the European Co-operation on Science and Technology (COST) Association and, subject to its usual rules, UK applicants are eligible to participate and receive funding in its interdisciplinary research networks (COST Actions) irrespective of the UK's association to Horizon Europe. As a result, UK participants in COST Actions are therefore not covered by this Guarantee.

1.2.8. For any queries about the scope of the Guarantee, please contact EUGrantsFunding@ukri.org.

1.3. Terms and Conditions of the Horizon Europe Guarantee

1.3.1. The applicable terms and conditions are dependent on the call ID of the Horizon Europe award applied for.

1.3.2. For Horizon Europe Guarantee grants hosted through Je-S and TFS the relevant terms and conditions are [the standard UKRI FEC terms and conditions](#) and any additional conditions that are added to the award.

1.3.3. For the Horizon Europe Guarantee grants hosted on the Innovation Funding Service (IFS), the [Horizon Europe Guarantee full terms and conditions](#) are published alongside this document. Please note that the applicable terms and conditions are dependent on the call ID of the Horizon Europe award applied for.

- 1.3.4. In addition to the terms and conditions referenced above, the policies outlined within this guidance document form the expectations UKRI place on award holders and may also be used in determining if awards have been appropriately managed and costs are eligible.
- 1.3.5. UKRI reserves the right to modify any of the terms and conditions of the Horizon Europe Guarantee.

1.4. Closing to new applications

- 1.4.1. The final deadline to apply for Horizon Europe Guarantee is 4pm on 27 November 2025. More information is available on the [Guarantee webpage](#), including the dates for calls that close before 27 November 2025.
- 1.4.2. Any eligible UK based organisation receiving notification of success for a Guarantee-eligible call after 27 August 2025 will have a minimum of three months from notification of success from the European Commission to apply to UKRI, ensuring those with late notification will still be able to access support and funding through the Guarantee.
- 1.4.3. Projects already funded by the Horizon Europe Guarantee will continue to receive support as planned. There will be no disruption to any projects that have already been onboarded onto the Joint Electronic Submission (Je-S), UKRI's Funding Service (TFS) or the Innovation Funding Service (IFS) systems.

2. Key Terms and Definitions for Horizon Europe Guarantee

Affiliated Entity: An entity bearing a legal and/or capital link to a beneficiary, which participates in the action with similar rights and obligations as the beneficiaries, but does not sign the Grant Agreement.

Associated Country: A country that is not a Member State of the EU but has a formal agreement with the EU detailing the terms of its association to a European framework programme.

Associated Partner: An entity which participates in the action, but without the right to charge costs or claim contributions. They cannot lead the consortium, and do not sign the Grant Agreement.

Beneficiary: A signatory of the original Horizon Europe Grant Agreement (either directly or through an accession form).

Consortium Agreement: A contract governing the operational relations (e.g. intellectual property, commercialisation, internal management arrangements) between the partners in a collaborative Horizon Europe project.

Directly Incurred Costs: Costs that are explicitly identifiable as arising from the conduct of the Project which are charged as the cash value actually spent and are supported by an audit record.

European Commission (EC): The main executive body of the European Union, responsible for creating the European Framework Programmes for Research and Technological Development, including Horizon Europe (FP9).

Full Economic Costs (FEC): A cost which, if recovered across an organisation's full programme, would recover the total cost (direct, indirect and total overhead) including an adequate recurring investment in the organisation's infrastructure.

Funding Assurance Programme (FA): A programme of visits and office-based tests by UKRI to seek assurance that grant funds are used for the purpose for which they are given and that grants are managed in accordance with the terms and conditions under which they are awarded.

Funding & Tenders Portal (FTO/"Portal"): EC electronic portal for management of European funding programmes including Horizon Europe.

Grant: Support for a proportion of the full economic costs of the Project (100% on Guarantee grants).

Grant Agreement: An official document setting out specific details of the Grant, including the Project start and end date, Grant value and any Specific Terms and Conditions of the Grant as required by the relevant Council.

Grant Holder: The entity to which the Grant is assigned and that has responsibility for the intellectual leadership of the Project and for the overall management of the research funded by the Grant.

Grant Period: The duration of time between the Project start and end date.

Grant Terms and Conditions: The Standard Terms and Conditions of the Guarantee Grant (which may be derived the UKRI standard FEC Grant terms and conditions and/or the IFS Grant terms and conditions), together with the Specific Terms and Conditions of Grant (including additional Call Conditions), that together comprise the basis on which the Grant is awarded to the Research Organisation.

Guarantee Guidance: The set of documents detailing how UKRI policies governing the Horizon Europe Guarantee should be followed and further explaining UKRI's expectations of grant holders based upon their respective grant terms and conditions.

Horizon Europe (HEu): The EU's research and innovation funding programme from 2021–2027.

Horizon Europe Guarantee ("the Guarantee"): The UK Government funding programme created to support UK-based entities who were successfully evaluated

for Horizon Europe funding during the period after the UK's withdrawal from the European Union but before the UK's Horizon Europe association deal took effect.

Host Organisation/Institution: Entity responsible for hosting and engaging the Principal Investigator for agreed duration of the project. May bear beneficiary responsibilities depending upon grant type.

Indirect Costs: Non-specific costs charged across projects based on estimates that are not otherwise included as direct costs. These may include the costs of the Research Organisation's administration such as personnel, finance, IT, legal, general laboratory, office consumables, library and some departmental services.

Innovation Funding Service (IFS): Funding and grant management platform for businesses and research organisations, used for some Guarantee grants.

Innovate UK (IUK): The UK's innovation agency and a constituent part of UKRI, responsible for supporting UK organisations to develop and commercialise new products, processes, and services. Delivers Guarantee grants hosted on IFS.

Joint Electronic Submission (Je-S): Platform used for the submission of grant-related information, used for some Guarantee grants.

Principal Investigator (PI) / Project Lead (PL): The individual responsible for ensuring project objectives are met and obligations under the Grant Agreement are fulfilled.

Project Partner: A collaborating organisation who will have an integral role in the proposed research. This may include direct (cash) or indirect (in-kind) contributions such as expertise, staff time or use of facilities. Project partners may be in industry, academia, third sector or government organisations in the UK or overseas, including partners based in the EU.

Research Organisation (RO): The organisation to which the Grant is awarded and which takes responsibility for the management of the Project and accountability for funds provided.

Subcontracting: Contracts for goods, works or services which are part of the action tasks outlined in the original Horizon Europe proposal.

Transparent Approach to Costing (TRAC): An agreed methodology used by universities and other higher education bodies for calculating full economic costs.

The UKRI Funding Service (TFS): UKRI's new funding opportunities and grant management system, which will replace Je-S/Siebel.

3. UK Participation in the Horizon Europe Programme

3.1. UK Association to the Horizon Europe Programme

- 3.1.1. On 7 September 2023, the UK agreed a deal to associate to Horizon Europe through [a bespoke new agreement with the EU](#).
- 3.1.2. UK-based researchers can now apply for Horizon Europe funding, certain that all successful applicants will be covered through the UK's association or through the Horizon Europe Guarantee for the remainder of the programme. From the 2024 Work Programme and onwards, UK researchers will be able to fully participate in the Horizon Europe programme on the same terms as researchers from other associated countries, including leading consortia.
- 3.1.3. For the 2021, 2022, and 2023 work programmes, the European Commission will continue to administer transitional arrangements, and the UK will continue to provide funding under the Horizon Europe Guarantee.

Prior to the UK's association to the Horizon Europe Programme, the European Commission allowed entities in the UK to apply for Horizon Europe funding as if the UK were an Associated Country. In '[Questions and answers on the UK's participation in Horizon Europe](#)' (European Commission) it is stated that:

"The General Annexes attached to the main Horizon Europe work programmes (2021- 2022 and 2023-2024) ensure that UK applicants are treated as if the UK is an associated country throughout the process, from admissibility and eligibility to evaluation, up until the preparation of grant agreements. However, grant agreements can only be signed if the association has come into force. The same treatment is also granted to any applicants from other associated countries currently engaged with the European Commission in an active process of association."

- 3.1.4. Further details from the Department for Science Innovation and Technology can be found on the [Horizon Europe and Copernicus programmes: 2023 UK-EU agreement explainer](#).
- 3.1.5. The separate [association specific guidance for Guarantee grant holders](#) has been published on the UKRI website.

3.2. Applying to Horizon Europe

- 3.2.1. UK applicants must still apply for funding from the EU as beneficiaries and not as Associated Partners (please see specific guidance for EURATOM in P2&3 Document) in order to be eligible for funding from UKRI. The change to Associated Partner status must only be made after the project has been assessed at the point of preparing the Horizon Europe grant agreement. UK applicants must apply for funding

from the EU as beneficiaries and not as associated partners (please see specific guidance for EURATOM) in order to be eligible for the UK government's Horizon Europe Guarantee or the Horizon Europe programme.

If required, the change to associated partner status must only be made after the project has been assessed at the point of preparing the Horizon Europe grant agreement.

- 3.2.2. The eligibility of any individual consortium is a decision for the European Commission to make, and projects should follow guidance from the European Commission. The minimum eligibility requirements for a consortium, including the number of Member State or Associated Country participants, are conditions set out by the European Commission in the legal agreements of Horizon Europe and are specific to the type of call.

3.3. After a Successful Horizon Europe Application

- 3.3.1. Following successful evaluation, the Commission will notify applicants of their success and invite them to begin the Grant Agreement Preparation process. For calls covered in the 2021, 2022, and 2023 Work Programmes under which UK organisations cannot sign their EU grant agreement, UK organisations can participate in the project as an associated partner (i.e., no longer classed as a beneficiary) if the topic allows Third Country participation.

In this case, UK organisations should notify the project coordinator and the European Commission (EC) project officer that they would like to participate as an associated partner. The EC will acknowledge this, and that organisation will no longer be part of the grant agreement signature process. The coordinator should keep affected UK organisations up to date on the progress of the grant agreement signature.

- 3.3.2. Any successful UK applicant who applied to Horizon Europe as an associated partner instead of as a beneficiary due to a genuine mistake on their part, or because the consortium coordinator changed their status to associated partner, should contact UKRI (EUgrantsfunding@ukri.org) to discuss their situation and determine if they meet the eligibility criteria.

Please note that the temporary funding route may be removed before the end of the application window for the UKRI Guarantee.

- 3.3.3. The 'last legal date for signing the Horizon Europe grant agreement' refers to Article 31 of the EU's [Regulation Establishing Horizon Europe](#) document:

"The following periods shall apply... for signing grant agreements with applicants, a maximum period of eight months from the final date for submission of complete proposals."

This is the last date by which the EC must sign the Grant Agreement. The EC may choose to set a Grant Signature Date that is earlier than this last legal date, but they

may not postpone beyond it. This applies to all Horizon Europe calls except ERC and MSCA, for which the dates provided in the work programmes are used.

3.4. Associated Partner Status

- 3.4.1. Associated partners implement action tasks without receiving EU funding and do not sign a Horizon Europe grant agreement. While associated partners do not have a capital or legal link to a specific beneficiary, the other beneficiaries in the consortium take on the responsibility (through consortium agreements or contractual arrangements) to ensure proper implementation of the associated partners' elements of the project, as well as compliance with specific obligations of the grant agreement which are extended to associated partners.
- 3.4.2. Only entities eligible for EU funding can sign the Horizon Europe Grant Agreement, and a legal entity must sign the grant agreement to fill the role of Project Coordinator. UK organisations that applied to be a Project Coordinator under a call within the 2021, 2022, and 2023 Work Programmes, need to discuss this with the EC Project Officer and project consortium, and agree that an existing partner or a new partner will take on this role. The funding allocation within the consortium should then be adjusted accordingly.
- 3.4.3. Associated partners do not sign the Horizon Europe Grant Agreement, but if part of a multi-beneficiary project do sign the consortium agreement. Guarantee-funded UK organisations will need to accept certain Articles from the grant agreement (see below) which should be inserted into the consortium agreement.

The grant agreement Articles that apply to associated partners are as follows:

- Article 11 (proper implementation)
- Article 12 (conflict of interests)
- Article 13 (confidentiality and security)
- Article 14 (ethics)
- Article 17.2 (visibility)
- Article 18 (specific rules for carrying out action)
- Article 19 (information)
- Article 20 (record- keeping).

Guarantee-funded UK organisations will also need to accept that the bodies mentioned in Article 25 can exercise their rights towards them.

The [Model Grant Agreement](#) gives further details at Article 9.1 (p 39-40). Project coordinators should be asked to insert the provisions of Article 9.1 into the consortium agreement and say that they apply to the relevant UK organisation. Note that any financial provisions in the consortium agreement do not apply to Guarantee-funded UK organisations which should be excluded from those provisions.

Many projects use the [DESCA Model Consortium Agreement](#) although actual formats may differ.

The consortium agreement will be signed prior to the signature of the grant agreement. Once the grant agreement is signed the project can begin.

While Horizon Europe regulations generally require a participant to be based in a Member State or an Associated Country in order to lead a project, UK participants in successful consortia should follow the guidance of the European Commission on eligibility, project roles and signing the grant agreement for calls under the 2021, 2022 and 2023 Work Programmes.

3.4.4. Those funded through the Guarantee who are part of EU consortia will have associated partner status on the Horizon Europe Grant Agreement. This may include additional obligations, for example around the recruitment and working conditions of researchers, as described in the [Charter and Code for Researchers](#).

3.4.5. When UK applicants to Horizon Europe calls eligible for the Horizon Europe Guarantee reach a point where they are required to sign the grant agreement then the process to follow will depend on the nature of the European grant applied for.

For consortium-style grants, the Guarantee is in place to fund eligible UK-based participants' roles in these projects. The European Commission will require a UK partner to change the status of their participation to 'associated partner'. The UK partner will be required to provide proof of the successful grant to UKRI, complete the application process for the Horizon Europe Guarantee, and UKRI will provide the UK partner's share of the funding under the Guarantee.

For mono-beneficiary Horizon Europe awards, eligible UK entities will provide proof of success in the evaluation process to UKRI, complete the application process for the Horizon Europe Guarantee, and UKRI will provide the entity with funding under the Guarantee.

4. General Horizon Europe Guarantee Eligibility Guidance

4.1. British Overseas Territories

4.1.1. Organisations in British Overseas Territories are not eligible to receive Horizon Europe Guarantee awards.

4.2. Horizon Europe Work Programmes and Calls

4.2.1. As stated above, The Horizon Europe Guarantee is intended to support all UK-based Horizon Europe awardees (excluding British Overseas Territories) for excellent science, research and innovation who submitted to calls covered within Horizon Europe 2021, 2022, and 2023 work programmes who cannot sign a grant agreement with the European Commission or delegated party, because it is not covered by the UK's bespoke association deal, and therefore cannot receive funding.

- 4.2.2. The Guarantee represents a comprehensive commitment to include the Horizon Europe calls covered within work programmes 2021, 2022, and 2023 with limited exceptions (for further information on excluded calls/topics contact EUGrantsFunding@ukri.org). For calls with multiple separate deadlines, only calls with final submission deadlines in either the 2021, 2022, or 2023 Work programmes are considered to be in scope.
- 4.2.3. The work programme a Horizon Europe call falls under is indicated by the year contained in the call ID:
- if the call ID includes '2023,' the call is part of the 2023 work programme and will be covered by the UK government Guarantee (for example, HORIZON-CL2-2023-DEMOCRACY-01-02)
 - if the call ID includes '2024,' the call is part of the 2024 work programme and will be covered by the bespoke new association agreement (for example, HORIZON-CL2-2024-DEMOCRACY-01-02)

The year of call deadlines does not delineate which work programme they belong to – please be aware that a small number of 2023 work programme calls will close in 2024 and a small number of 2024 work programme calls will close in 2023.

4.3. Horizon Europe Reserve List

- 4.3.1. Applicants to the Guarantee will be asked for proof that their Horizon Europe application has been invited to Grant Agreement Preparation (GAP) process by the EU. Applicants originally placed on a reserve list, that subsequently receive an invite to the GAP process, can apply for the Guarantee.

The Guarantee will not fund reserve list applications that have not been invited to the GAP process.

4.4. Cascade Funding

- 4.4.1. Under Horizon Europe rules, associated partners may not hold or administer cascaded funding. Such funding, if originally included in the Horizon Europe application budget, must be transferred to a non-UK partner in the consortium before the Grant Agreement is finalised.
- 4.4.2. UK entities may be recipients of cascaded funding held by a Horizon Europe consortium, depending on the exact call conditions. Therefore, such funding streams will not be covered by the Horizon Europe Guarantee.

4.5. Consortium Projects

- 4.5.1. Horizon Europe Guarantee funding will not be jeopardised if a consortium reallocates the EU funding originally assigned to a UK institution to fund additional activities, unless, when combined with Guarantee funding, this takes the consortium

budget over the total envelope allowable for that award. For consortium-style projects, the Guarantee will fund UK participants for the activities assigned to them as beneficiaries in the original proposal, as long as these activities are still assigned to them as associated partners in the final signed EU grant agreement. Guarantee funding will only be reduced if the UK participant is no longer performing an activity assigned to them in the original proposal.

- 4.5.2. UK participants in successful consortia should follow the guidance of the European Commission on eligibility, project roles and signing the grant agreement for calls under the 2021, 2022 and 2023 work programmes.
- 4.5.3. Costs for UK-based Affiliated Entities in consortia will be covered by the Guarantee in the same way as costs for mono-beneficiary projects. Prior to association, the EU will treat UK-based affiliated entities as associated partners, and they will be covered by the Guarantee.
- 4.5.4. UK-based organisations that are part of a multi-beneficiary consortium eligible for the Guarantee and wish to relocate some project tasks to the UK (for example, if a researcher is moving to a UK institution and wants to take their part of the grant with them, or if a partner withdraws from the project and the UK partner is best placed to replace them), this may be possible, provided the following conditions are met:
 - first contact UKRI (EUGrantsFunding@ukri.org), provide details of the situation, and receive agreement in principle for the move
 - the EU project must not yet have started or incurred any costs. The proposed movement of tasks to the UK must not render the EU project ineligible
 - the project tasks must have been initially assigned to a beneficiary in the EU proposal, not an Associated Partner
 - the value of funding requested for the tasks moved to the UK must not exceed the budget assigned to those tasks in the original EU proposal (unless specifically approved by UKRI).

If these conditions are met, a copy of the original EU proposal and an amended EU grant agreement should be supplied to UKRI with the tasks removed from the original beneficiary and reassigned to a new or existing UK associated partner. This must be accompanied by a covering letter explaining why the tasks are being relocated to the UK and confirming that the new UK host is willing to accept the additional tasks.

- 4.5.5. Guarantee grant holders can request to add a UK-based affiliated entity to complete action tasks. Permission from UKRI must be sought before work is transferred, otherwise costs may be deemed ineligible.

To add a UK-based affiliated entity to a grant, the following conditions must be met:

- transfer of work must be necessary for the grant holder to deliver their project tasks

- for consortium projects, written support must be received from the consortium coordinator for the work to be transferred
- the affiliated entity must have a legal or capital link, as defined in the Horizon Europe AGA, to the grant holder which goes beyond the scope of the Guarantee-funded project
- work must be performed by the affiliated entity at cost, no profit can be made by the affiliated entity
- employees of the affiliated entity must work under conditions similar to those directly employed by the grant holder (not including presence requirements)
- the grant holder must agree prior to the transfer of work and/or funds to take on full responsibility for their affiliated entity's participation in the project. This includes completion of assigned tasks, proper use of funds, retention of appropriate documentation in case of future audit, and return of any funds deemed necessary by the Guarantee.

To add a UK-based affiliated entity to the grant, you must submit a project change request for approval before the affiliated entity begins working on the grant.

- 4.5.6. Please note, international affiliated entities of UK based organisations are not eligible to receive funds under the Horizon Europe Guarantee.

4.6. Horizon Europe Calls not Covered by The Guarantee

- 4.6.1. UK entities applying to the 2023 Research Infrastructures work programme for call for HORIZON-INFRA-2023-SERV-01 (topics 01, 02 and 03) as beneficiaries will be directly funded by the Horizon Europe programme.
- 4.6.2. Funding for the Innovation Health Initiative (IHI) Call 11, topics 2 to 5 is not available through the Horizon Europe Guarantee Scheme. The eligibility criteria for Topics 2 to 5 of IHI Call 11 state that UK organisations are not eligible for IHI funding, as these topics are financed from EU budget years that predate the UK's association with Horizon Europe.
- 4.6.3. The UK Government had hoped to provide funding via the Horizon Europe Guarantee Scheme. This is not possible because UK organisations are not able to apply as beneficiaries requesting EU funding, as was the case for Work Programmes 2021 to 2023. The UK Government appreciates that this will be disappointing for researchers considering bidding for these topics. This decision only applies to IHI call 11, Topics 2 to 5. UK organisations that meet the eligibility requirements for IHI Call 11 Topic 1 are encouraged to apply as normal.
- 4.6.4. In parallel to, but separate from, the UK Horizon Europe Guarantee, UK institutions will be able to participate in IHI Call 11 Topic 4 "Leveraging Europe's expertise to accelerate cell therapy for type 1 diabetes". This will be funded through the [Type 1 Diabetes Grand Challenge](#) in partnership with UKRI, who will administer the UK funding.
- 4.6.5. Funding under the Guarantee is limited to calls listed in Horizon Europe Work Programmes 2021, 2022, or 2023. Some Framework Partnership Agreements (FPAs)

were listed in these calls; however, if the subsequent Specific Grant Agreement (SGA) for these FPAs are within Work Programmes 2024 or later, they fall outside of the scope for Guarantee funding.

- 4.6.6. Communications with the EC have confirmed that, in line with Work Programmes 2024 or later, proposals for SGAs may only be submitted by the consortium selected under the FPA. If no UK entities are part of the said consortium as partners/beneficiaries and there is no subsequent amendment of the FPA to include UK entities as such, UK entities are not currently eligible to participate as beneficiaries in a SGA grant. There is no general commitment to amend FPAs retroactively to foresee the addition of UK entities in the relevant FPA consortia as partners/beneficiaries.
- 4.6.7. Amending an FPA to include UK entities as partners is possible, subject to the eligibility of the UK entity under the conditions of the FPA, which cross-refer to same conditions/procedures as set out under SGAs (see article 11 of the FPA model on addition of accession and addition of new beneficiaries). The procedure requires an amendment that would need to adhere to the general rules to request an amendment and cannot constitute a blanket or guaranteed commitment.
- 4.6.8. Since the amendment will need to be triggered by the consortium itself, such an amendment to include the participation of UK entities as partners/beneficiaries would require mutual agreement by all parties involved. Additionally, the UK entity would need to comply with all the eligibility criteria set out in the call for proposals setting up the FPA, while ensuring also that such a change would not call into question the decision awarding the FPA or the equal treatment of applicants.
- 4.6.9. In order to participate in an SGA, the UK entity must first be included as a partner/beneficiary under the FPA. Therefore, an amendment of the FPA would need to already be in place prior to application. A retroactive amendment of the FPA after the submission of application to the SGA (and subsequent closure of the call) is in principle not foreseeable.
- 4.6.10. Horizon Europe prizes are out of scope for the Horizon Europe Guarantee.
- 4.6.11. Calls issuing cascade funding from EC funded projects, also known as Financial Support for Third Parties, are not covered by the Horizon Europe Guarantee.
- 4.6.12. For further information on Horizon Europe call eligibility or calls not covered by the Guarantee, please contact EUGrantsFunding@ukri.org.

5. Horizon Europe Guarantee Funding and UKRI Standard Practices

5.1. Horizon Europe Guarantee Funding

- 5.1.1. UK participants who have received a UKRI grant under the Guarantee will remain on the UKRI grant for the lifetime of the project, subject to the relevant UKRI terms and conditions. Now that the terms of the UK's association with Horizon Europe have been agreed, the Guarantee will remain active to cover grants that have been successful in any eligible 2021, 2022, and 2023 Work Programme calls.
- 5.1.2. Three UKRI funding systems will be used to deliver Horizon Europe Guarantee.
- Calls that are part of the Marie Skłodowska-Curie Actions (MSCA) or European Research Council (ERC) schemes will be covered by individual calls delivered on the Joint Electronic Submission (Je-S) system or the UKRI Funding Service after the results of the original EU calls are announced.
- All other eligible Horizon Europe calls will be delivered on the Innovation Funding Service (IFS) system.
- 5.1.3. Funding will be delivered by UKRI in pounds sterling. Payments are made quarterly in arrears as standard.
- 5.1.4. Horizon Europe Guarantee grants associated with projects structured according to the EU under the lump sum model will also be funded by UKRI on a quarterly claims basis as standard.
- 5.1.5. Exchange rates may be revised during the lifetime of the grant. The terms and conditions of the Grant Offer Letter include a clause allowing for exchange rate revisions, which is intended to protect each grant from extreme currency fluctuations. UKRI may change the GBP grant value or exchange rate on live grants in response to significant fluctuations in international exchange rates, but not more frequently than once in a 12-month period, and not retrospectively. For example, in the event of a significant fall in the sterling, UKRI reserves the right to award additional funds to the grant based on a new exchange rate.
- 5.1.6. The following table details the exchange rates to determine Horizon Europe Guarantee award values in pounds sterling.

Period Covered	Exchange Rate	Details
Up to 31 December 2022	£1: €1.160354	Reflects the average exchange rate between January 2021 and October 2021.
1 January 2023 - 31 December 2023	£1: €1.180720	Reflects the 2022 average daily spot rate to the end of September 2022. Applied to new Guarantee applications, not to already

		funded Guarantee grants. Revised rate applies for new Guarantee applications to UKRI from 1 January 2023 to 31 December 2023.
1 January 2024 - 31 January 2025	£1: €1.148787	Reflects the 2023 average daily spot rate to the end of September 2023. Applied to new Guarantee applications from 1 January 2024, not to already funded Guarantee grants. Revised rate applies for new Guarantee applications to UKRI from 1 January 2024 to 31 January 2025.
1 February 2025 - 31 December 2025	£1: €1.174684	Reflects the 2024 average daily spot rate to the end of September 2024. Applied to new Guarantee applications from 1 February 2025, not to already funded Guarantee grants. Revised rate applies for new Guarantee applications to UKRI from 1 February 2025.
1 January 2026 – 31 December 2026	£1: €1.175970	Reflects the 2025 average daily spot rate to the end of September 2025. Revised rate applies to new Guarantee applications to UKRI from 1 January 2026 to 31 December 2026, not to already funded Guarantee grants.

5.2. Funding Acknowledgement

5.2.1. All research publications must acknowledge funding received from UKRI. This includes, but is not limited to:

- research articles published in journals
- conference proceedings and publication platforms
- monographs
- book chapters
- edited collections
- outputs deposited at institutional or subject repositories

If the research has supported the development of patents or exploitable intellectual property grant holders must make sure that UKRI is fully acknowledged.

For Horizon Europe Guarantee projects wholly funded by UKRI, acknowledgement of funding should include UK Research and Innovation written out in full, followed by the grant number in square brackets. For example: 'This work was funded by UK Research and Innovation (UKRI) under the UK government's Horizon Europe funding Guarantee [grant number].'

For collaborative projects which are part of EU-funded consortia, grant holders will need to cite the EU project according to their requirements in addition to acknowledging the funding from UKRI. If there is more than one UK partner involved in the output, then please include all grant reference numbers as appropriate.

- 5.2.2. UKRI branding guidelines and download logos are available on our [brand hub](#).

5.3. UKRI Trusted Research and Innovation Principles

- 5.3.1. For projects that will be working with international partners, collaborators or Third Parties, the [UKRI Trusted Research and Innovation \(TR&I\) principles](#) should be adopted. Appropriate levels of due diligence should be carried out on overseas partners before projects begin in line with the TR&I principles. Appropriate mitigations should be in place to manage any risks identified before any project activity affected by the risk begins or is continued. More information on the TR&I principles for effective international collaboration can be found on the UKRI website.

Any questions about UKRI's expectations on due diligence for international collaboration for the Guarantee should be sent to EUGrantsFunding@ukri.org.

5.4. Open Access Research

- 5.4.1. It is expected that all Horizon Europe Guarantee grant holders will adhere to the Horizon Europe open access policy.

5.5. Research Data Sharing

- 5.5.1. It is expected that all Horizon Europe Guarantee grant holders will adhere to the Horizon Europe research data sharing and management policy.

5.6. Research Ethics

- 5.6.1. Guidance relating to research ethics and integrity can be found in the [Good research resource hub](#).

6. General Horizon Europe Onboarding Guidance

6.1. Applying to the Horizon Europe Guarantee

- 6.1.1. The procedure for submitting an application for Guarantee funding will vary depending on Horizon Europe call and will make use of existing UKRI systems and processes.

For ERC and MSCA calls, applications are to be submitted to the UKRI Funding Service. For application support contact EUGrantsFunding@ukri.org.

For Horizon Europe calls that fall under Pillars 2 and 3 of the programme, registration will be via Innovate UK's Innovation Funding Service (IFS). For application support contact support@iuk.ukri.org.

- 6.1.2. Specific guidance for submitting an application for Guarantee funding can be found on the [Horizon Europe Guarantee guidance page](#).
- 6.1.3. Since applications will have been evaluated through the European Commission's trusted peer review systems, no further assessment of application quality will be undertaken by UKRI. Organisational validation and due diligence checks will be carried out in line with UKRI standard processes.
- 6.1.4. Although deliverables (such as a career development plan, data management plan, or gender equality plan) should be developed and maintained for the project in line with Horizon Europe's standard procedures, it is not necessary to submit this to UKRI directly. However, plans should be made available to UKRI upon request.

7. State Aid and Subsidy Control

7.1. Compliance with State Aid and Subsidy Control Acts

- 7.1.1. For organisations that successfully applied to Horizon Europe and will receive funding via the Horizon Europe Guarantee scheme as their only current source of funding, there are State Aid/Subsidy issues to consider.

A subsidy scheme was created in anticipation of the Subsidy Control Act 2022 coming into effect from 4th January 2023 to meet the requirements contained within the UK-EU Trade and Cooperation Agreement by UKRI to cover awards issued under the Horizon Europe Guarantee. This scheme is now referred to as a legacy scheme within the [Subsidy Control Act s.48](#).

- 7.1.2. The [Horizon Europe Guarantee Scheme](#) was published on 8 November 2022, which means all Grant Offer Letters signed and returned on or after this date are considered to be awarded under the Legacy Scheme and are treated as subsidies for enterprises acting economically. Any Grant Offer Letters signed and returned before 8 November 2022 will be considered as no-subsidy.

This has no material effect on an organisation's grant funding.

- 7.1.3. Tasks in any current project funded by a UK public body should not replicate the activities conducted in the Horizon Europe Guarantee project as this may be breach of subsidy rules. If uncertain, please contact support@iuk.ukri.org.
- 7.1.4. Conducting multiple Horizon Europe Guarantee-funded projects does not put an organisation at risk of breaching State Aid/Subsidy compliance rules, as long as the scope and eligible costs of the awards do not overlap.

- 7.1.5. Non-commercial enterprises should also check the details of the Horizon Europe project for breach of State Aid/Subsidy compliance rules (e.g., in case the project is producing income). In any event, the same rules on double funding apply.

8. General Horizon Europe Guarantee Cost Eligibility Guidance

8.1. General Cost Eligibility

- 8.1.1. 100% of the applied-for Horizon Europe eligible costs will be paid (i.e., 100% of the requested EU contribution to eligible costs), subject to exchange rate fluctuations and any reduction in tasks undertaken by the UK participants during the finalisation of the Horizon Europe grant agreement. In all but exceptional circumstances, the amount that can be requested from UKRI is capped at the value originally approved by the EC in their assessment of the original Horizon Europe proposal.
- 8.1.2. Costs should start to be incurred only after the Grant Offer Letter has been received. If costs are incurred before this point, such as paying a deposit on equipment, it is done at the grant holder's own risk. Once the Grant Offer Letter is received, expenditure may be incurred and subsequently charged to the grant from either the start date of the grant or the date the Offer Letter was issued, whichever is earlier.
- 8.1.3. Costs incurred in booking travel and accommodation before the UKRI Guarantee grant start date for a kick-off meeting will be eligible.
- 8.1.4. Only personnel costs that meet the Horizon Europe general and specific cost eligibility criteria as defined in the [Horizon Europe Annotated Model Grant Agreement](#) are eligible under this cost heading.
- 8.1.5. Childcare-related costs can be allowable on Horizon Europe Guarantee grants if they cover additional childcare beyond the normal job requirements and are directly related to the project. These costs may be requested if the organisation's policy allows for reimbursement. However, childcare costs associated with normal working patterns are not eligible for reimbursement.
- 8.1.6. International tuition fees for PhD students are allowable costs on all Horizon Europe Guarantee grants. Please note that this policy applies to Horizon Europe Guarantee grants and does not reflect a change in wider UKRI policy.
- 8.1.7. Costs for open access should be charged to Horizon Europe Guarantee grants in the first instance. Organisations in receipt of the UKRI block grant to support open access publication costs for research articles should only use this to cover such costs arising from Horizon Europe Guarantee grants that cannot be covered by the Guarantee funds. When using the UKRI block grant, standard UKRI policy ([RGC 12.4.1](#)) applies.

8.1.8. Costs for research data sharing and management can be charged to Horizon Europe Guarantee grants.

8.1.9. In line with UKRI cost eligibility, alcohol is not permitted and should not be sought as an eligible cost.

8.2. Use of Funds for Strategic Enhancement Activities

8.2.1. UKRI permits the reallocation of funds between activities that have been formally approved and fall within the scope defined in Annex 1, for the purpose of strategic enhancement that directly supports or amplifies the project's original objectives and outputs. Any activity outside this scope requires further approval.

8.2.2. Such reallocation may be undertaken without prior approval only where it does not otherwise constitute a change to Annex 1.

8.2.3. This can be done without seeking prior approval provided that the activities:

- directly enhance outputs already specified in the Grant Agreement or approved amendment
- adhere to all standard cost eligibility rules
- are clearly and demonstrably linked to the project's approved aims and objectives
- do not extend the duration of the grant

8.2.4. Grant holders must seek approval from UKRI prior to undertaking these activities where these conditions are not met.

8.2.5. Eligible enhancement activities may include, but are not limited to:

- knowledge exchange, dissemination, and exploitation activities
- travel and subsistence that directly builds on the existing project and does not constitute preparation for a separate action
- impact generation initiatives aligned with approved objectives
- enhanced delivery of existing approved deliverables, without introducing new or revised deliverables
- capacity building activities directly necessary to deliver existing approved activities and outputs, and not for future or unrelated work

8.2.6. Where there is any uncertainty about whether a proposed activity is permitted, grant holders are encouraged to seek clarification from UKRI in advance by contacting EUGrantsFunding@ukri.org for Pillar 1 (ERC and MSCA).

9. General Horizon Europe Guarantee Project Reporting

9.1. Horizon Europe and UKRI Reporting Commitments

- 9.1.1. For Horizon Europe calls open to Third Countries, UK participants funded through the Guarantee will not be required to provide the European Commission with reports against deliverables in the Grant Agreement. As associated partners implement action tasks without receiving EU funding and do not sign the Grant Agreement, they have no direct obligation to provide reports against deliverables. The beneficiaries in the consortium will have responsibility for submitting deliverables to the EU and depending on the tasks to be delivered by the associated partner, would agree the associated partner's expected contribution to reporting through consortium agreements or contractual arrangements.
- 9.1.2. Along with project reporting to UKRI, it is expected Horizon Europe Guarantee grant holders participating in consortium projects provide reports as required to the project coordinator.
- 9.1.3. If there are any changes to the technical monitoring of existing Horizon Europe Guarantee grants, the Guarantee team will inform all parties as and when required.

9.2. No-cost Extensions Necessary for Final Project Reporting

- 9.2.1. Guarantee-funded UK partners in consortium projects can apply for a maximum of (usually) 60 days no-cost extension where necessary to complete final consortium reporting at the end of the action as detailed in the Grant Agreement.

The costs which can be incurred during the extension will be strictly limited to those directly linked to final consortium reporting. No other costs will be deemed eligible.

Grant holders will be expected to apply for the extension (if necessary) in the final three months of the project. If costs are incurred beyond the end date of the grant without prior approval, they will be deemed ineligible.

10. Specific Guidance on Calls Hosted on Je-S and The Funding Service

10.1. Electronic System

- 10.1.1. Due to system constraints, EPSRC will be formally hosting these awards on behalf of UKRI on Je-S and the Funding Service. EPSRC will not be involved in the processing of the awards and any queries should be directed to EUGrantsFunding@ukri.org and not to EPSRC.

- 10.1.2. For recruited researchers or fellows on MSCA Guarantee awards, the Je-S or UKRI Funding Service account is linked to an individual, not the research organisation. The user account should be updated to reflect the UK-based host institution for the project.

10.2. Holding an ERC or MSCA Guarantee Grant Alongside Other Funding

- 10.2.1. A grant holder can hold the ERC or MSCA Guarantee grant alongside a grant issued from another research organisation, subject to certain conditions:
- the grant holder cannot receive funding from more than one grant to support work on the same, or a substantially similar, project, without prior written approval from UKRI. Grant holders are responsible for ensuring that there is no duplication of funds, and adequate records must be kept to allow for a funding assurance audit if requested
 - where more than one funding source is involved in the project, UKRI must be fully informed, and must receive full acknowledgement for all research supported by the Guarantee, in accordance with the grant agreement

10.3. Global Talent Visa

- 10.3.1. The grant offer letter from UKRI contains sufficient information for Global Talent visa applications and approvals.
- 10.3.2. Please note that bespoke letters from UKRI naming the researchers are not required for the visa application.
- 10.3.3. For further guidance on how to get a Global Talent visa please see '[Getting a Global Talent visa to do research in the UK](#)'. For further guidance on Global Talent visa applications, please view more at '[Work in the UK as a researcher or academic leader \(Global Talent visa\)](#)'.
- 10.3.4. For further queries about the Global Talent visa, please email globaltalentvisa@ukri.org.
- 10.3.5. Application for a Global Talent visa may be submitted before receiving the UKRI award letter. The endorsing bodies have agreed that the written confirmation of an ERC/MSCA grant required to apply for the Global Talent visa can be the same documents that have submitted to the UKRI Guarantee. The advice is:
- "If you have received your successful results in all eligible ERC/ MSCA Guaranteed calls, but don't have a Grant Agreement because you are submitting your grant details to UKRI in order to receive funding through the Horizon Europe Guarantee, then you can submit the following documents with your Global Talent visa endorsement application: either a) a copy of the European Research Executive Agency GAP invitation letter and a copy of the grant proposal (which contains the

individual researcher's name); or b) a copy of your UKRI Guarantee Grant Offer Letter or UKRI Grant Agreement."

- 10.3.6. Information on potential visa options for researchers coming to the UK for MSCA Guarantee projects has been established by the UK Research Office (UKRO) Brussels based team below. Please note that UKRI (including UKRO) cannot give immigration advice on individual cases, so please liaise directly with the [UK government](#) for specific advice.
- 10.3.7. There is a [dedicated factsheet](#) about researchers coming to the UK for MSCA grants. This highlights the Skilled Worker visa type as another potential option alongside the Global Talent visa route.
- 10.3.8. UKRO also ran a series of webinars to help increase awareness and sharing information on immigration and MSCA, the recordings and slides from these webinars can be found below:
- [MSCA Postdoctoral Fellowships: Navigating the UK Immigration Landscape](#)
 - [Navigating the UK Immigration Landscape: Supporting Short-term Mobility to the UK Webinar](#)
- 10.3.9. For MSCA Guarantee Postdoctoral fellows who are named on the grant and using the Global Talent visa, route 2 should always be used. Their team members can and should use route 3. More information can be found on the [Royal Society website](#).

10.4. Branding

- 10.4.1. UKRI funding must also be [acknowledged](#) and included where appropriate. For more information on funding acknowledgement, please see [UKRI's guidelines and download the logos](#).
- 10.4.2. Please contact EUgrantsfunding@ukri.org to be emailed the UKRI Horizon Europe Guarantee branding pack with logos and templates.
- 10.4.3. UK based ERC Guarantee grant holders are entitled to refer to their project as 'selected by the ERC, funded by UKRI' and can use the ERC logo and branding.
- 10.4.4. Guarantee-funded MSCA researchers should prefix their title with "UKRI Guarantee". For example:
- UKRI Guarantee Doctoral Network Students
 - UKRI Guarantee Postdoctoral Fellows

10.5. UKRI Funding Service Application Processing

- 10.5.1. From May 2024, UKRI transitioned to the new Funding Service for submission. For submissions made to the Funding Service, the anticipated time to receiving a decision is eight weeks if all the information is submitted correctly. The process may take longer if additional information is required, depending on how quickly the

additional information is provided. The processing time may also increase when high volumes of applications are received. UKRI will prioritise those looking to start their awards soonest, as far as possible. Patience is appreciated during the transition to the new system.

10.5.2. Applications to the below opportunities are being processed through the Funding Service but with offer letters issued via Je-S.

- MSCA Doctoral Networks 2023
- MSCA Post Doctoral Fellowships 2023
- ERC Advanced Grants 2023

10.5.3. Applications to the below opportunities are being processed through the Funding Service with offer letters issued via the Funding Service.

- ERC Starting Grants 2023
- ERC Consolidator Grants 2023
- MSCA Citizens Grants 2023
- MSCA Staff Exchanges 2023
- MSCA COFUND 2023

10.6. Call Closure

10.6.1. The ERC and MSCA Guarantee calls hosted through Je-S and the Funding Service will close approximately one year after they have been opened. UKRI reserves the right to close any Guarantee calls earlier than this, but any such closure will be communicated in advance through the guidance pages. Before any of the calls are closed, Guarantee funding applicants will be given due notice.

10.6.2. See [section 1.4 for guidance on the final closing date of the Guarantee Scheme](#) to new applications.

10.7. Call Names

10.7.1. The Guarantee will use the scheme and call names given in the following table. For the purposes of applying for UK visas, the Je-S and the Funding Service scheme names will be included on the list of approved schemes for the Global Talent Visa, where appropriate.

Call	Je-S Scheme Name	Je-S Call Name	The Funding Service Call/ Opportunity Name
ERC Starting Grant	UKRI Frontier Research Guarantee	Horizon Europe Guarantee ERC Starting Grants 2021/ 2022/ 2023 (invite only)	HEu Guarantee: ERC Starting Grants 2023

Call	Je-S Scheme Name	Je-S Call Name	The Funding Service Call/ Opportunity Name
ERC Consolidator Grant	UKRI Frontier Research Guarantee	Horizon Europe Guarantee ERC Consolidator Grants 2021/ 2022/ 2023 (invite only)	HEu Guarantee: ERC Consolidator Grants 2023
ERC Advanced Grant	UKRI Frontier Research Guarantee	Horizon Europe Guarantee ERC Advanced Grants 2021/ 2022/ 2023 (invite only)	HEu Guarantee: ERC Advanced Grants 2023
MSCA Postdoctoral Fellowships (PF)	UKRI Postdoctoral Fellowships Guarantee	Horizon Europe Guarantee MSCA Postdoctoral Fellowships 2021/ 2022/ 2023 (invite only)	HEu Guarantee: MSCA Postdoctoral Fellowships 2023
ERC Proof of Concept	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee ERC Proof of Concept Grants 2022/ 2023 (invite only)	N/A
MSCA Citizens	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA Citizens Grants 2021/ 2023 (invite only)	HEu Guarantee: MSCA Citizens Grants 2023
MSCA Staff Exchanges	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA Staff Exchanges 2021/ 2022/ 2023 (invite only)	HEu Guarantee: MSCA Staff Exchanges 2022
MSCA Staff Exchanges	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA Staff Exchanges 2021/ 2022/ 2023 (invite only)	HEu Guarantee: MSCA Staff Exchanges 2023
MSCA COFUND	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA COFUND 2021/ 2022/ 2023 (invite only)	HEu Guarantee: MSCA COFUND 2022

Call	Je-S Scheme Name	Je-S Call Name	The Funding Service Call/ Opportunity Name
MSCA COFUND	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA COFUND 2021/ 2022/ 2023 (invite only)	HEu Guarantee: MSCA COFUND 2023
MSCA Researchers at Risk	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA Researchers at Risk 2021 (invite only)	N/A
ERC Synergy	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee ERC Synergy Grants 2022/ 2023 (invite only)	HEu Guarantee: ERC Synergy Grants 2023
MSCA Doctoral Networks (DN)	ERC and MSCA Other Guarantee Calls	Horizon Europe Guarantee MSCA Doctoral Networks 2021/ 2022/ 2023 (invite only)	HEu Guarantee: MSCA Doctoral Networks 2023

10.8. Applying

- 10.8.1. Specific guidance on how to apply for Guarantee funding for ERC and MSCA grants can be found on the [Horizon Europe Guarantee guidance page](#).

10.9. Start Date

- 10.9.1. The Funding Service System constraints require project start dates to be later than the current date at time of submission. Please note that the duration of the grant does need to match what was in the original proposal.
- 10.9.2. The timing of payments will follow UKRI's standard quarterly pay runs for research grants. Please consider this when deciding the Guarantee grant start date in the application. This date does not need to match the start date in the original proposal.
- 10.9.3. 1 September 2025 will be the latest start date for the MSCA Postdoctoral Fellowships 2023 call. For all other ERC or MSCA grant types, UKRI expects the grant to start within one year of the calls opening in Je-S or the Funding Service.
- 10.9.4. If the desired start date is beyond this, grant holders should contact the Guarantee team at EUGrantsfunding@ukri.org with a rationale for the later proposed start date. Requests will be considered on a case-by-case basis.
- 10.9.5. After the award has been accepted through Je-S or the Funding Service, the research administrator will be sent a start confirmation document with the start date of the

project. The Start Confirmation must be submitted within 42 days of the project start. Any kind of eligible grant expenditure may be used to trigger the submission of the start confirmation.

- 10.9.6. The start confirmation in the Funding Service can be submitted from either the announced start date or the date the grant agreement is issued, whichever is earliest. The start date cannot be earlier than the earliest start date in Je-S. It cannot be a date in the future. The process for accepting and starting awards can be found in [Appendix A](#).

10.10. Time Commitment

- 10.10.1. The PI or fellow's time commitment can be changed on an ERC or MSCA grant subject to the following conditions:
- an increase in PI or fellow commitment on the project, or across multiple projects, cannot exceed an FTE of 100%
 - the total award amount will not be increased if a PI or fellow increases their time commitment
 - PI or fellow time commitment cannot be reduced below the minimum % for each grant type, as specified in the relevant ERC or MSCA Work Programme. Where ERC or MSCA rules would require the researcher to be present in a Horizon Europe Member State or Associated Country for this FTE %, Guarantee grant holders must be present in the UK
 - any reduction in PI or fellow time commitment and/or FTE % must not negatively impact the project, nor reduce the PI or fellow's ability to provide essential supervision, guidance, and other support to researchers and staff employed to work on the project
 - the eligible personnel costs will be reduced commensurate to the reduction in time commitment for Guarantee grants.
- 10.10.2. An email statement must be provided by the PI and sent to EUGrantsFunding@ukri.org stating the intended time change in terms of FTE (e.g., 80% FTE reduced to 50% FTE) and acknowledging the relevant points above. UKRI will then consider the request on a case-by-case basis.
- 10.10.3. An adequate record must be kept for the host organisation's internal auditing procedures. This may be in the form of timesheets, daily records or monthly declarations, as appropriate.

10.11. Remote Working

- 10.11.1. UKRI expect that staff employed on a grant who are based remotely will be able to meet their objectives, and that they will be fully supported to carry out their role and have access to appropriate facilities. While staff may be able to work abroad, depending upon host organisation policies, it is our expectation that Guarantee-funded researchers will be ordinarily based in the UK, and that they will maintain a

formal contractual engagement with the UK based research organisation or business for the full duration of the project.

- 10.11.2. UKRI may, at any time, request assurances that the employer is supporting such arrangements and are able to demonstrate and evidence the staff member is being fully supported to carry out their role. Where a staff member is recruited to work permanently overseas or remotely, the employer and employee are responsible for ensuring compliance with international working regulations.

10.12. Changes to Active Projects

- 10.12.1. Any changes to an ERC or MSCA Guarantee grant once it has become active will follow [UKRI's normal process for requesting changes](#) on Je-S or the Funding Service. More detailed information can be found in [Appendix A](#) of this Guidance.

10.13. Grant Suspensions and No cost Extensions

- 10.13.1. Grants can be suspended through a suspension grant maintenance request on Je-S or the Funding Service if there are no costs to be charged on it until it is live again. If there will be staff working on the grant or costs incurred during the Principal Investigator/Project Lead's leave, then a no-cost extension can be used to cover this.
- 10.13.2. In accordance with standard [UKRI policy \(RGC 6 Extensions\)](#), it is possible to request a no cost extension.
- 10.13.3. No cost extensions for non-people related reasons for longer than 6 months over the lifetime of the grant will be permitted only under exceptional circumstances, with requests considered on a case-by-case basis. Requests for no cost extensions for any reason not covered in the [UKRI Terms and Conditions for Research Grants](#) must be sent to EUGrantsFunding@ukri.org and include all details of the request.
- 10.13.4. No cost extensions towards the end of the grant can be requested via a Je-S or Funding Service grant maintenance extension request. Please see [Appendix A](#) for detailed instructions on requesting suspensions and no-cost extensions in Je-S and the Funding Service.
- 10.13.5. Requests for extensions should be made at least 3 months before the grant end date.

10.14. Grant Transfer to Another UK Institution

- 10.14.1. For UK-UK Guarantee grant transfers where costs have been incurred, UKRI's standard process will apply ([RGC 7.2](#)).

Requests to transfer a grant to a new organisation must be submitted at least six months before the grant's end date and include confirmation that both organisations have agreed to the transfer.

- 10.14.2. Transfers for grants with less than six months duration remaining, must be managed between the relinquishing and receiving organisations.
- 10.14.3. Once the transfer request has been approved by UKRI, the timings of the transfer will be subject to the quarterly payment schedule. Any future payments to the original host will be cancelled and a Transfer Expenditure Statement (TES) will be issued.
- 10.14.4. The original host organisation will have 3 months to submit this back to UKRI. Until the TES is sent back to UKRI the transfer cannot be progressed and payments will be suspended. It is recommended that both research organisations should agree on a TES submission date to ensure the smooth transfer of the grant.
- 10.14.5. The TES should be treated as a [Final Expenditure Statement](#) and based on the actual costs that have been spent on the grant, for both ERC and MSCA.

For MSCA projects, UKRI would expect the actual costs spent on the grant to align with the person-months allocation.

For ERC projects, UKRI would expect the TES to be based on actual spend; however, the Indirects are to be calculated as 25% of the Directs spent, reflecting the calculation ratio of the initial application.
- 10.14.6. As the funding headings have been simplified for all Guarantee calls, please ensure the total amount of costs incurred is accurate and sits under the closest possible available fund heading.

10.15. Cost Eligibility Guidance

- 10.15.1. Cost eligibility guidance is provided in the [Supplementary Cost Eligibility Guidance for HE Guarantee Grants Administered via Je-S and TFS](#). This document contains the cost eligibility criteria for post-award requests to use budgeted funds for new costs which were not in the original proposal/budget, and which have therefore not undergone EC evaluation.

10.16. Budget Transfer

- 10.16.1. Cost category and budget shifts are allowed following the award of the Grant Offer Letter. These adjustments can be made by transferring amounts between cost categories and/or forms of costs, as long as the action is implemented as described in Description of the Action of the Horizon Europe Grant Agreement.

10.17. Project Monitoring

- 10.17.1. Grants may fall under the regular programme of assurance checks carried out on Research Council grants. UKRI reserves the right to carry out additional monitoring as required. However, no project officers will be assigned to these awards, even those which are part of EU consortia (MSCA Doctoral Networks, Staff Exchanges and COFUND Guarantee grants). UK partners in MSCA consortia awards funded by UKRI

under the Guarantee are expected to contribute to the European Research Executive Agency (REA) post-award monitoring requirements as required.

10.18. Project Deliverables

- 10.18.1. If a Guarantee-funded UK partner is unable to complete their part of a multi-beneficiary project, the funding can be transferred to another UK institution capable of completing the work. In exceptional cases where no alternative UK institutions are available, EUGrantsFunding@ukri.org should be contacted to determine if certain tasks can be subcontracted to non-UK institutions.

10.19. Financial Reporting

- 10.19.1. When ERC and MSCA Guarantee grants finish, UKRI's standard processes will apply. More detail can be found on the '[reporting your project's spending](#)' section on the UKRI website. Please note, ERC and MSCA Guarantee grants do not need to submit interim expenditure reports. UKRI expect the Final Expenditure Statement (FES) to report what was spent on the grant once it has finished and to be submitted within 3 months of the grant coming to an end. Any underspend between what was awarded in the offer letter and spends reported in the FES will be recovered by UKRI.

10.20. Final Expenditure Statement

- 10.20.1. The [Final Expenditure Statement](#) (FES) is based on the actual costs that have been spent on the grant, for both ERC and MSCA.
- 10.20.2. As the funding headings have been simplified for all Guarantee calls, please ensure the total amount of costs incurred is accurate and sits under the closest possible available fund heading using the guidance below.
- 10.20.3. For ERC PoC, ERC Synergy and MSCA Guarantee grants, enter all incurred costs under the 'Other Directly Incurred costs' heading.

For MSCA Guarantee grants which follow the EC's unit contributions model, recruited researchers must receive 100% of the eligible researcher allowances over the lifetime of the grant, in accordance with the [MSCA Financial Guide](#).

For the purposes of the FES, institutions are expected to follow the EC person-months costing methodology to calculate spend on researcher contributions (living, mobility, family, long-term leave and/or disability allowances). However, final spend on institutional contributions (research, training, and networking; management and indirect costs) should be calculated on an actual costs.

- 10.20.4. For ERC Starting/ Consolidator/ Advanced Guarantee grants, enter all incurred costs under the most appropriate heading of the following:
- Staff (directly incurred)
 - Project Student (exceptions - Staff)
 - Travel and Subsistence

- Other Directly Incurred costs
- Indirect costs

10.21. Research Outcome Reporting on Researchfish

- 10.21.1. Guarantee grant holders hosted via Je-S or the Funding Service will be expected to report general research outcomes through Researchfish. UKRI's general guidance on [reporting outcomes](#) on Researchfish can be found online. However, UKRI have issued more [detailed Guarantee specific guidance](#) on the website.
- 10.21.2. There is [specific guidance on reporting for grants in a multiple-grant project](#) for those that have applied through Je-S with a lead and non-lead proposal which can be found in the [Guarantee Researchfish guidance](#).
- 10.21.3. Please note, although the grants are being hosted by EPSRC on the Je-S system, there will be no Council-specific rules or questions asked in the reporting for the Guarantee grants.
- 10.21.4. The UKRI Research Outcomes submission period is open each year for six weeks from early February to mid-March as per the UKRI's [Reporting Outcomes](#) guidance. All projects required to submit through Researchfish will receive an email notification. More information on the consequences of not reporting can be found on the '[if you do not or cannot report](#)' part of the UKRI website. If unsure whether Researchfish should be completed for the current submission period, please email EUgrantsfunding@ukri.org.
- 10.21.5. Guidance including how to log into and use Researchfish is available on the [ResearchFish website](#). For any issues using the system, please contact the Researchfish support team by email at support@researchfish.com or online via their [live chat service](#) (available 9am – 5pm Monday to Friday).
- 10.21.6. Along with the Researchfish submission as outlined above, UKRI expects UK Guarantee grant holders to provide reports to the project coordinator as expected within the consortium.

11. Horizon Europe Guarantee ERC Award Specific Guidance

11.1. Guarantee calls in the 2023 work programme

- 11.1.1. For any eligible Guarantee calls in the 2023 work programme UKRI required an additional letter confirming the ERC GAP process has been terminated. These calls were not covered by the association deal and therefore there was a possibility that the ERC grant could be taken up in an eligible EU country. Therefore, UKRI requested a confirmation that a grant agreement has not been signed with a host institution in the EU and that the ERC grant preparation would be terminated.

11.2. ERC Synergy Grants

- 11.2.1. ERC Synergy Grant calls have now been closed. A group of 2-4 PIs were required to apply. Only one of the PI's could have been hosted in an institution outside of the EU or Associated Countries. If the consortium was deemed eligible by the European Research Council, then the UK-based PI would have been able to apply for funding under the Guarantee. EUgrantsfunding@ukri.org had to be contacted with the details of the project (including proposed start dates and the amount of funding sought under the Guarantee), consortium composition and any other relevant details for ERC Synergy Grants.

11.3. Holding Multiple ERC Grants

- 11.3.1. Successful applicants of ERC grants run by the European Research Council, are able to hold both an ERC Guarantee grant and an ERC grant. PIs have to adhere to the ERC's proposal eligibility criteria, time commitment requirements and resubmission policies depending on the type of ERC grant. Grant holders are subject to both UKRI's T&Cs and the European Commission's grant agreement conditions.
- 11.3.2. Only grant holders of an ERC grant funded directly by the European Commission were eligible to apply for an ERC Proof of Concept (PoC) Grant from the 2024 work programme onwards.

11.4. Association of ERC Grantees (AERG)

- 11.4.1. UK based ERC Guarantee grant holders are entitled to join the [Association of ERC Grantees](#) (AERG). The associated costs for membership can be charged to the Guarantee grant.

11.5. Access to the Guarantee Funding

- 11.5.1. To access funding for successful ERC Starting/Consolidator/Advanced/Proof of Concept Grants, applicants must submit PDF copies of:
- the original ERC proposal (including Part A, the application form and Part B, the research proposal)
 - the host organisation letter of support
 - confirmation that the proposal was successful (for example, Invitation to begin Grant Agreement Preparation or 'GAP')
 - the evaluation summary report (also known as 'Step 2 Evaluation Report')
 - a completed cost conversion tool (a template for specific calls is available to download on the UKRI website)
- 11.5.2. The Funding Service submission process has been made as swift as possible to complete, requiring some details about the project for administrative purposes only. The information submitted will not be reassessed by peer reviewers for scientific

merit. Organisational validation and due diligence checks will be carried out in line with UKRI business as usual processes.

11.5.3. Successful Horizon Europe applicants who applied to be hosted outside the UK and wish to move their project to a UK institution before signing their grant agreement and claim funding via the UKRI Horizon Europe Guarantee need to ensure their submission includes:

- A letter of support from the new UK-based host organisation, in addition to the original host organisation letter of support
- Confirmation a grant agreement has not been signed with a host institution in the EU and that the ERC grant preparation will be terminated.

11.5.4. The letter will need to be a PDF on headed paper from a senior representative within the host institution (someone capable of speaking on behalf of the host institution) stating the following:

- names of the Principal Investigator/Project Lead and project title
- confirmation that the original ERC grant will be withdrawn from the ERC grant preparation process.

11.5.5. Any ERC-approved additional funding will be paid through UKRI's Guarantee process. The additional funding will be wrapped into the overall award and paid on the same profiled schedule as the rest of the grant.

11.6. UK-based ERC Guarantee Grant Transfer to Another UK-based Organisation

11.6.1. ERC grant types funded through the Guarantee will be portable within the UK according to UKRI [standard terms and conditions](#).

11.6.2. The process for moving a UK-based ERC Guarantee grant to another UK-based organisation will depend on the status of the Guarantee grant application. If the application has not yet been submitted to UKRI, an extra letter of support from the new host institution will be required as an additional attachment to the grant in the Funding Service. This will need to explain the rationale for the move and that the new host will provide the necessary environment, facilities, and support to ensure the project can successfully proceed. This will need to be a PDF on headed paper from a senior representative within the host institution (someone capable of speaking on behalf of the host institution).

11.6.3. If the offer has been issued but not yet accepted, or if the offer has been accepted, but the grant is not yet active, please email EUgrantsfunding@ukri.org with the additional letter as outlined above. It may be possible to retract the offer letter, or the grant may need to be treated as a transfer. Please see [Appendix A](#) for the process of grant transfers.

11.7. ERC Guarantee Grant Transfer to UK from Europe

- 11.7.1. Awardees of ERC Starting, Consolidator and Advanced Grants through calls covered within Work Programmes 2021, 2022, and 2023 who applied to be hosted in EU country other than UK may move their project to the UK and be funded through the Guarantee, subject to two conditions:
- they have not signed an ERC grant agreement to be hosted elsewhere
 - they can demonstrate through submission of a host institution letter that a UK research organisation is prepared to host them for the lifetime of the grant.
- 11.7.2. Applicants who have applied to be hosted outside the UK and wish to move their project to a UK institution are advised to e-mail EUgrantsfunding@ukri.org before applying.
- 11.7.3. If the Principal Investigator or Project Lead of an ERC Starting, Consolidator or Advanced Grant from a call covered by the UKRI Horizon Guarantee wishes to move the grant to a UK-based host institution **after** signing the ERC grant agreement, this will be possible, regardless of the start date, as long as the following conditions are met:
- no direct costs have been incurred under the ERC grant, i.e., the project has technically started but there have been no costs incurred in the project
 - the ERC grant must be terminated before applying to UKRI for Guarantee funding
 - formal notification from the EC granting authority (e.g., ERCEA) that confirms this termination must be included with the UKRI Guarantee application alongside an up-to-date letter of commitment from a UK-based host institution with the submission on the Funding Service.
- 11.7.4. Transferring an ERC grant which has incurred expenditure is outside the scope of the Horizon Europe Guarantee. However, it may be possible to move the grant to the UK under a pilot scheme. Applications to this scheme will be reviewed on a first come first served basis. Applicants should seek approval from UKRI before terminating their ERC grant or applying to the pilot scheme, as further information will be required. In addition to the conditions above, UKRI will send a template to complete which will require details such as:
- the costs already incurred
 - the remaining grant value to be awarded
 - a supporting statement from the new host organisation
- 11.7.5. The date this form is returned will be considered the date of application to this pilot scheme. These forms will be checked for eligibility to the scheme. Once eligibility and funding availability is confirmed, applicants will be advised to terminate their ER grant and a direct link to apply via the UKRI Funding Service will be sent with instructions on next steps.

11.7.6. Specific conditions for funding under this pilot scheme:

- 11.7.6.1. This is an ERC Starting, Advanced, or Consolidator grant funded through the Horizon Europe Work Programmes 2021, 2022, and 2023.
- 11.7.6.2. Other countries equivalent of the Guarantee scheme are not eligible.
- 11.7.6.3. Only the remaining funds available on the award will be covered, there is no scope for increasing this amount
- 11.7.6.4. Grants must be able to start within 3-months of notification of success, unless agreed in writing, in advance.
- 11.7.6.5. The duration of the grant remaining will be honoured, and the grant can only be extended by up to 6-months (at no additional cost) to accommodate delays due to transferring the grant. If grant durations are to be extended this should be done as the grants are onboarded, not as a later no-cost extension. This will not affect other no-cost extensions.
- 11.7.6.6. Grants must have at least 12 months left to run.
- 11.7.6.7. No additional funding for relocation is available.
- 11.7.6.8. Transferred grants must still be viable as outlined in the project proposal.
- 11.7.6.9. There must be no more than six-months gap from the termination of the ERC award to starting the grant in the UK, unless agreed beforehand in writing with UKRI. As this is a new pilot scheme, grants that terminated on or before April 2026 will be given three-months from this point to apply and agree a start date as part of the application process.
- 11.7.6.10. ERC additional funding for eligible start-up costs for researchers moving from a third country, the purchase of major equipment, access to large facilities, or other major experimental and field work costs is not eligible.
- 11.7.7. In the application, details about the project must be provided for administrative purposes. The information submitted will not undergo any form of qualitative reassessment. Organisational validation and due diligence checks will be carried out in line with UKRI standard processes.

11.8. Free Virement Across Cost Headings

- 11.8.1. The ERC Guarantee grants have an additional call condition, which allows for free virement across cost headings for costs which have been through the ERC's assessment process. The costs may be vired between any fund headings as required for the delivery of the research. Higher amount of funding than what was originally assessed by the ERC will not be provided. However, the funds can be moved across categories to meet the needs of the project.

- 11.8.2. Note that free virement is only allowed for purposes consistent with the original proposal and which have already undergone EC evaluation. On virement or repurposing of funds for new purposes, please see the Costs Not Undergone EC Evaluation section below.

11.9. PhD Studentships

- 11.9.1. PhD studentships applied for on the original ERC proposal will be covered by the Guarantee. If funded on the UKRI studentship model, rather than as a salaried Research Assistant, the minimum stipend paid must match or exceed the UKRI minimum stipend. Please see: [Get a studentship to fund your doctorate – UKRI](#) for more details.

11.10. Overseas Costs

- 11.10.1. Costs originally planned in the ERC application associated with overseas team members may be covered by the Guarantee, including personnel costs, subcontracting, and other direct costs such as travel, subsistence, equipment, and consumables. Guarantee funding will be distributed from UKRI to the Host Institution to be disbursed to other organisations involved in the project.

11.11. Visa Costs

- 11.11.1. Visa fees can be claimed from the grant where directly incurred staff spend at least 50% of their working time on the project for an ERC Guarantee grant. All visa costs incurred, including Immigration Health Surcharge (IHS) and Certificates of Sponsorship, must be a direct result of the person being employed on the grant for 50% or more of their contracted time. This does not extend to family members. All costs must be met within the original grant cash limit.

11.12. Travel and Subsistence Costs

- 11.12.1. For all travel and subsistence (T&S) costs, the research organisation's standard institutional policy should be followed in the first instance, in accordance with standard UKRI Research Grants Terms and Conditions. The [UKRI business expense claims, business travel and subsistence policy](#) provides further guidance.
- 11.12.2. If there is a required cost which would not normally be covered by the standard UKRI policy, please submit the details to EUGrantsFunding@ukri.org for assessment. If the request is justifiable and deemed acceptable, then grant holders must follow their organisation's internal process of consideration for exceptional circumstances.
- 11.12.3. All travel claims should evidence value for money alongside environmental impact, welfare and business need. Consequently, these should only include travel by standard class by train and economy class by air. Exceptions to this would be permitted where there is a justifiable health and wellbeing need and approved by the research organisation prior to purchase and evidence of this should be available.

Consideration to the environmental impact of travel should be in line with the institutional policy.

11.13. Costs Not Undergone EC Evaluation

- 11.13.1. Under certain circumstances, it may be possible to repurpose funds within a cost heading or to vire funds between cost headings to pay for equipment, personnel, subcontracting, or other costs which were not included in the original European Commission (EC) proposal.
- 11.13.2. To repurpose funds or vire funds for a purpose that has not already undergone EC evaluation, a letter of support from the PI/ Project Lead **must** be sent to UKRI (via email to EUGrantsFunding@ukri.org) which addresses the following points:
 - provides an explanation, intelligible to non-specialists, about the nature and purpose of the new cost and the benefit it will provide to the project
 - outlines the circumstances which led to the funding becoming available
 - affirms and explains how the new purpose fulfils the relevant EC cost eligibility rules, both general (i.e., is 'connected to the action and necessary for its implementation', and is 'reasonable, justified, and in line with principles of sound financial management') and specific (see the relevant cost eligibility conditions on the [Annotated Model Grant Agreement](#)).

All decisions will be made on a case-by-case basis using information provided in the PI's letter of support.

11.14. Cost for Exceptional Equipment

- 11.14.1. Requests to use Guarantee funding towards equipment costs not included in proposal will be decided on a case-by-case basis and would have to adhere to the guidance on repurposing funds within a cost heading.
- 11.14.2. In general, in the event that permission is given to use Guarantee funding to make a partial contribution to the overall cost of equipment not described in the original proposal, UKRI would expect that the Guarantee project should benefit from instrument time proportional to the amount contributed. For example, if the Guarantee grant contributes 60% of the equipment cost, then the Guarantee project should be allocated at minimum 60% instrument time over the project duration.

11.15. Subcontracting

- 11.15.1. 'New subcontracting costs' include any subcontracting not explicitly detailed in the original Horizon Europe proposal and therefore not evaluated by the EC. This includes the selection of specific subcontractor(s) for a subcontracting need outlined in the original proposal. Following the award of the Grant Offer Letter, it may be possible to add new subcontracting costs to a Guarantee grant, subject to the following eligibility conditions:

- only a limited proportion of project tasks may be subcontracted
- all relevant EC eligibility conditions (general & specific) contained in the [Annotated Model Grant Agreement](#) are met, and the request complies with the provisions of the Subsidy Control Act 2022 and all EU State Aid obligations
- the requested subcontracting is not subject to any conflicts of interest
- a robust selection and evaluation process has been followed, and the selected subcontractor represents best value for money with public funding (i.e., the best price-quality ratio or the lowest price, as applicable)
- additional subcontracting must not lead to total costs exceeding the maximum grant amount allocated to the project.

To request the addition of new subcontracting costs, the PI/project lead must submit a formal letter of request to EUGrantsFunding@ukri.org for ERC Guarantee grants.

The letter of request must contain a declaration that the new subcontracting agreement will meet the conditions listed above and a full explanation of the necessity of the subcontracting for the successful implementation of the project, including:

- which project task(s) are to be subcontracted
- a summary of the circumstances that led to the need for new subcontracting.
- how the funding would be sourced from within the existing budget (e.g., virement of costs from another cost heading)
- full details of the proposed subcontractor(s) and a brief description of the subcontractor selection process, including justification for why the proposed subcontractor represents best value for money. Full documentation of this process should be retained and must be made available to UKRI upon request
- if a non-UK subcontractor is being proposed, grant holders must demonstrate that no UK-based subcontractor is available who would meet the eligibility criteria; if a UK-based alternative exists, grant holders must be able to demonstrate that the non-UK option would represent best value for money.

Based on the information provided, UKRI will approve or reject new subcontracting requests on a case-by-case basis. UKRI reserves the right to reject new subcontracting requests if there is deemed to be insufficient evidence that the relevant eligibility conditions have been met, the proposed subcontracting would not represent best value for money with public funding, or there is deemed to be a significant risk of conflict(s) of interest.

- 11.15.2. It is possible to replace a subcontractor who was named in the original project proposal under certain circumstances. Any new subcontractor must be selected according to a robust evaluation process and fulfil all applicable UKRI and EC terms and conditions. In cases where multiple subcontractors are being considered to perform project tasks previously undertaken by a single subcontractor, the grant

holder must demonstrate that the task cannot be completed satisfactorily by a single subcontractor.

To request the addition of new subcontractor(s), the PI/project lead must submit a formal letter of request to EUGrantsFunding@ukri.org for ERC Guarantee grants. The letter of request must contain all relevant information.

11.16. Sabbaticals

- 11.16.1. Sabbaticals are permitted on ERC Guarantee grants, subject to the ERC minimum PI time commitment rules, unless agreed otherwise with UKRI's approval.
- 11.16.2. If the minimum ERC PI time commitment cannot be met and there will be no other staff working on the grant during the proposed period of leave, the grant can be suspended for up to 12 months and resumed once the PI is able to meet minimum time commitments again. While the grant is suspended, costs will not be able to be charged to the grant.
- 11.16.3. If a sabbatical needs to be requested, please send answers to the below questions directly to EUGrantsFunding@ukri.org:
 - What are the PI's plans for the sabbatical?
 - What % of the PI's working time do they want to work on the grant whilst on sabbatical?
 - What was the PI's % of working time committed in the original ERC proposal?
 - Does the PI anticipate having any PhDs / PDRAs / technicians / other staff working on the grant whilst they plan to be on sabbatical?
 - What is the number of months the PI plans to be on sabbatical?
 - What plans are in place to ensure the proposed sabbatical does not have a detrimental impact on the project and/or any research staff?
- 11.16.4. UKRI will consider requests for up to 12 months. Requests for periods longer than this will only be considered in exceptional circumstances.

11.17. Maternity, Paternity, Adoption and Parental Leave

- 11.17.1. For maternity, paternity, adoption and parental leave UKRI's standard policies will apply. More details can be found in the links below:
 - [UK Research and Innovation FEC grants](#): standard terms and conditions of grant, RGC 8.3 Parental Leave
 - [UK Research and Innovation FEC grants](#): standard terms and conditions of grant guidance, RGC 8.3 Parental Leave
- 11.17.2. The grant itself can either be suspended through a suspension grant maintenance request if there are no costs to be charged on it until it's live again. If there will be staff still working on the grant or costs incurred during the Principal Investigator's leave, then a no cost extension can be used to cover this time period. No cost

extensions can be requested as standard under UKRI policy with no pre-approval from UKRI required for requesting this.

11.18. Disabled Students' Allowance (DSA)

- 11.18.1. Horizon Europe Guarantee-funded grants follow UKRI's harmonised process for Disabled Students' Allowance (DSA). This means that research organisations can claim back eligible costs at the end of the preceding academic year by submitting a completed DSA claim form by 31 October each year.
- 11.18.2. In addition to the above, Research Organisations will also need to provide a verification letter from the Head of Department, or equivalent, of the host organisation:
- Grant reference number and project title
 - Student's name
 - Confirmation that the student's PhD is being funded from the above-mentioned grant
 - Assurances that the student has undergone an impartial needs assessment and meets the eligibility requirements for additional support
- 11.18.3. At the end of the academic year a separate claim form for each eligible student should be submitted.

The research organisation will be notified of the outcome of the claim, and the payment will be included in the next scheduled grant payment as an additional funding stream to the specified grant. DSA funds will be paid to the research organisation and it will be the responsibility of the research organisation to have systems in place for reimbursement of these funds either to disability services or to the student, as appropriate.

Please see full details of the DSA framework at: [Disabled Students' Allowance \(DSA\) framework](#). The DSA claim form and guidance can be accessed via the following link: [Disabled Students' Allowance \(DSA\) claims](#).

DSA claim forms for grants administered on Je-S can be submitted via a Grant Maintenance Request. DSA claims for grants administered on the Funding Service should be emailed to EUGrantsFunding@ukri.org for UKRI to submit a request on the research organisation's behalf.

11.19. Remote Working

- 11.19.1. Seconded staff members and research staff, excluding Principal Investigators, employed on the grant are able to work remotely on a permanent basis if the research project allows, as long as organisational policies are adhered to. In accordance with standard UKRI policy, the host organisation continues to be wholly responsible for their terms and conditions of employment including any additional laws for overseas staff.

11.20. Timekeeping

11.20.1. For ERC grants, for all persons who work for the action less than 100% FTE, UKRI's expectation is that host organisations will retain, and provide UKRI upon request, either:

- a signed monthly declaration on day-equivalents worked for the action
- timesheets recording all time spent working on the action. These may be formatted according to the host organisation's internal auditing procedures

For staff working on the project at 100% FTE, records should be retained confirming their working conditions (including period of employment and FTE) and their actual engagement with the host organisation throughout the duration of the project (e.g. monthly payslips).

11.20.2. UKRI's normal funding assurance processes will be followed; as such, host organisations are expected to maintain timekeeping records to allow for an audit if required. More information can be found on UKRI's [funding assurance programme](#) pages.

11.21. PhD Student Absence Costs

11.21.1. For students employed as salaried staff on ERC grants who are absent due to parental leave, sick leave, or other leave, [standard UKRI T&Cs](#) apply (RGC 8.3 and 8.4).

11.22. For students funded on the UKRI studentship model who are absent due to family, medical, or additional leave, costs incurred by the research organisation may be charged to the grant. The research organisation's standard institutional policy on duration and pay for leave should be followed.

11.23. The costs incurred due to student absence and leave; are to be absorbed in the existing grant envelope. For further information or queries about student absence costs on ERC grants, please email EUGrantsFunding@ukri.org.

12. Horizon Europe Guarantee Marie Skłodowska-Curie Actions (MSCA) Award Specific Guidance

12.1. Terms and Conditions

12.1.1. MSCA Guarantee grants are subject to UKRI's standard [research grant terms and conditions](#), with additional conditions which are given in the specific call guidance. The policies outlined within this guidance document also form the expectations UKRI

place on award holders and may be used in determining whether awards have been appropriately managed and costs are eligible.

12.2. Recruitment

- 12.2.1. Organisations funded by the Guarantee must adhere to the normal MSCA provisions on recruitment and working conditions. UKRI expects that any recruiting organisations will follow the specific criteria as set out in the [Horizon Europe model grant agreement](#). These include publishing vacancies on the EURAXESS jobs portal, holding an open and impartial recruitment process, and adhering to the [European Charter, and Code of Conduct for the Recruitment of Researchers](#).

12.3. MCAA Membership

- 12.3.1. Currently Guarantee grant holders are not eligible for MCAA membership but are encouraged to participate in the [UK Chapter](#) by becoming a 'Chapter Friend' and engage in activities within the science and innovation community. The UK chapter collaborates with the MCAA to offer opportunities for researchers to benefit from community networking, knowledge sharing and professional development. Any changes to the wider MCAA membership for Horizon Europe Guarantee MSCA award holders will be updated in the Guarantee guidance.
- 12.3.2. Register for the MCAA [UK Chapter newsletter](#) to stay informed about the association and Chapter activities. This membership will cover all those in part funded by the Guarantee MSCA grant, as the MCAA is an alumni community beyond research. Horizon Europe Guarantee MSCA award holders can email the UK Chapter at united-kingdom.chapter@mariecuriealumni.eu to become a Chapter Friend.
- 12.3.3. Costs associated with attending MCAA UK Chapter events in person, or virtually, are considered an eligible cost to charge to Horizon Europe Guarantee grants within the original total funding amount, as no additional funding is available. This should come from the institutional unit contributions part of the budget, as the entirety of the funding under the contributions for recruited researchers should be paid directly to the researcher.

12.4. Funding

- 12.4.1. MSCA Guarantee grants will be funded in pounds sterling by profiled payments based on UKRI standard processes, i.e. quarterly payments in arrears. The total grant value will be based on the total value assigned to the UK participant in the original MSCA grant (calculated as the total applicable MSCA unit contributions for the full grant duration multiplied by the UK country correction coefficient), taking into account the exchange rate.

12.5. Timesheets

- 12.5.1. Timesheets are not required for Guarantee MSCA Grants. It is sufficient to present a contract with the host institution together with additional documents proving the

researcher's or student's dedication to the project. In keeping with UKRI's funding assurance processes, auditable records of all expenditure should be retained. More information can be found on [UKRI's funding assurance](#) programme pages.

12.6. Contributions for Recruited Researchers

- 12.6.1. It is expected that the policies and eligibility criteria as set by the European Research Executive Agency (REA) will continue to be applied.
- 12.6.2. The Guarantee scheme aims to replicate MSCA schemes, therefore Guarantee-funded MSCA projects should follow the same overarching scheme objectives. MSCA grants equip researchers at all levels with skills building across disciplines through global mobility. The projects funded by the Guarantee should be maximising the grant in line with these values.
- 12.6.3. MSCA Guarantee Postdoctoral Fellowships and Guarantee Doctoral Networks grants require that the full value under the heading "Contributions for the recruited researcher" in the original MSCA proposal (i.e., Living Allowance, Mobility Allowance, Family Allowance, Long-Term Leave Allowance, Special Needs Allowance) be paid to the researcher/fellow by the end of their fellowship, minus mandatory deductions under national law.
- 12.6.4. Fellows will be subject to the usual practices of their UK host organisation concerning how their allowances are paid. The European Commission respects national taxation rules which can differ depending on how the allowance is paid. The most common practice is to pay all allowances as a salary with necessary deductions.
- 12.6.5. It is UKRI policy that recruited researchers must receive 100% of the value of all eligible contributions for recruited researchers. It is expected that the full amounts of all researcher allowances which were claimed (proportional to researcher FTE%, where part-time engagement has been approved) will be recorded in the Final Expenditure Statement (FES). Records must be retained which confirm that the period of the fellow's employment corresponds to the number of person-months claimed, and that the researcher allowances have been disbursed as salary in accordance with the grant terms and conditions.
- 12.6.6. Please see [Appendix A](#) for how to submit a request for additional allowances on Je-S or the Funding Service.

12.7. Family Allowance

- 12.7.1. Family Allowance can be added to MSCA Guarantee Postdoctoral Fellowships and Guarantee Doctoral Networks grants if the researcher becomes eligible throughout the lifetime of the project.
- 12.7.2. If family is acquired during the implementation, evidence must be provided to show that the Research Organisation has confirmed the researcher's eligibility for Family

Allowance to UKRI. The additional allowance will then be added for the remainder of the grant through an additional funding stream. It will appear in the quarterly profile as standard over the grant.

- 12.7.3. Eligible applicants for family allowance who have not yet submitted an application for funding will need to submit the following as additional attachments along with the standard Guarantee application documentation listed in the specific call guidance.

A verification letter from the Head of Department, or equivalent, of the host organisation:

- indicating that the necessary documentation has been checked and meets the eligibility criteria as defined by the European Research Executive Agency (REA)
- confirming the total amount of eligible additional funding to be added to the grant
- an amended version of the UKRI cost conversion tool which reflects the additional allowance in GBP (£).

- 12.7.4. Any proportion of Family Allowance which has been paid out to host organisations in advance of need will be recovered if the recruited researcher does not become eligible during the project duration.

12.8. Special Needs Allowance

- 12.8.1. MSCA Special Needs Allowance for MSCA Guarantee Postdoctoral Fellowships, Doctoral Networks and COFUND Guarantee grants can be claimed either at the start of the grant when submitting details to UKRI, or during the lifetime of the grant if situation changes.

- 12.8.2. If a researcher becomes eligible before applying via Je-S or the Funding Service, they will need to include an additional letter from host organisation to confirm their eligibility along with the standard documentation in the call specific guidance on the [apply for Horizon Europe Guarantee funding](#) section of the UKRI website.

12.9. Long term Leave Allowance

- 12.9.1. For MSCA Guarantee Postdoctoral Fellowships, Doctoral Networks and COFUND grants, UKRI will align with MSCA's standard policy surrounding long-term leave allowance. UKRI will use their standard processes to cover the costs using an 'additional funding stream' to honor what would have been allowed under the European Research Executive Agency (REA) aligning with their eligibility criteria.

- 12.9.2. Long-term leave is defined as when the researcher goes on leave for longer than 30 days, for reasons other than annual leave. The person month contributions to both the researcher and the institution are suspended and replaced with long-term leave allowance.

The minimum eligible period for long-term leave is 31 consecutive calendar days.

- 12.9.3. The calculation will follow MSCA budget allocation for contributions for recruited researchers for each work program for personnel costs incurred by the employer in case of the researchers' leave. The amount is subject to all national legislation and internal policies of the host organisation. The host organisation's normal rules for duration and pay should be followed. The percentage covered by the host organisation is the amount the research organisation would normally be responsible for paying and is dependent on the internal policies of the research organisation and may change over time. Any remaining percentage should be provided by social security contributions where applicable. The long-term leave allowance will be payable only for the percentage of time that the staff are contracted on the grant.
- 12.9.4. The host organisation is responsible for providing accurate information as to the length of leave taken, the researcher's full-time equivalent as a percentage (FTE %), the host organisation's long-term leave contribution per month (as a decimal), and the proportion covered by statutory sick pay or equivalent government support.
- 12.9.5. A Guarantee grant can be extended up to the same number of person months as taken for the long-term leave. By submitting a request to UKRI for long-term leave allowances, the host organisation confirms that the costs funded through UKRI are not being claimed from any other source, for example HM Revenue and Customs.
- 12.9.6. To request a long-term leave allowance in advance of the proposed period of leave, a grant maintenance request will need to be submitted by the host organisation to suspend the grant. A letter from someone capable of speaking on behalf of the host organisation must be submitted via email to EUgrantsfunding@ukri.org which documents the eligibility of the researcher going on long-term leave and the length of leave being taken, noting that the no cost extension cannot exceed this duration. At the end of the leave period, or the end of the grant period, for any period of long-term leave which has been taken, the grant holder must provide UKRI with a completed long-term leave cost calculator. Guidance for calculating long-term leave allowance, along with a form template and the calculator, is available on the [Guarantee website](#) or can be provided via email upon request to EUgrantsfunding@ukri.org.

12.10. Parental Leave

- 12.10.1. UKRI will replicate MSCA policy on additional allowances for parental leave on MSCA Guarantee Postdoctoral Fellowships and Guarantee Doctoral Networks grants by using additional funding streams. If parental leave is required during the lifetime of an active grant, the host organisation is required to submit a completed long-term leave calculator submission and a letter confirming eligibility and date from which additional allowances will be claimed from. The template can be found on the [additional allowance page](#) of the Guarantee website.

12.11. Maternity Leave

- 12.11.1. Host organisation's normal rules for duration and pay should be followed for maternity leave. The decision about when the maternity leave can start is to be

decided by the researcher and host organisation. UKRI are able to grant a no cost extension for up to the duration of the period of leave. Guarantee grants can be extended by the same number of person months as taken for parental leave and this can be requested at the end of the grant via a grant maintenance request.

12.12. Institutional contributions

- 12.12.1. It is expected that auditable records will be retained which confirm the eligibility of all person-months claimed for the contributions for recruited researchers, and of all project-related expenditures covered by the institutional contributions. The Final Expenditure Statement should reflect the actual expenses incurred via the research, training, and networking costs and management/indirect costs budget, and any underspend remaining at the end of the grant will be recovered in accordance with UKRI funding assurance procedures.
- 12.12.2. The actual costs spent on the MSCA Guarantee grant should align with MSCA's pre-defined funding units, based on person-months, with minimal underspend. This factors in the exchange rate implemented at the point the project was onboarded to UKRI. Similarly, UKRI expect grants that do not run their full duration to spend in line with the person-month units. It is not acceptable for grants terminating early to utilise savings made here (for example, salary) to be repurposed for increased research or development activities.
- 12.12.3. The Guarantee requires that essential costs for living and working in the UK are covered from the institutional unit cost contributions in line with MSCA policy. Costs required for MSCA Guarantee fellows to have the right to work and live in the UK are covered from the institutional unit contributions.
- 12.12.4. Visa fees can be claimed from the Guarantee grant to cover the costs of the recruited researcher moving to the UK. This includes the Immigration Health Charge and any associated visa fees. These must come from the Institutional Costs part of the budget and the recruited researcher should not be asked to use their researcher allowances to cover any visa related costs for themselves.
- 12.12.5. Under the Guarantee, where the recruited researcher has family members who will be relocating with them, only the family allowance should be used to cover the travel and other relocation costs, including visa entry costs, for the family members. Any visa costs associated with eligible family members or dependents who are moving with the recruited researcher cannot be directly paid by the host organisation and instead should be offset via the family or mobility allowance that is paid to the researcher.

12.13. Research, Training and Networking Contributions

- 12.13.1. For MSCA Guarantee Postdoctoral Fellowships or Guarantee Doctoral Networks, the schemes aim to develop the recruited researchers or fellow. If research, training, and networking (RTN) costs have been lower than expected, grant holders are

encouraged to use the remainder to fund unplanned research, training, and networking opportunities which are directly linked to the research action.

Grant holders should seek to make use of these opportunities within the grant period wherever possible, ensuring that costs remain eligible under the Horizon Europe Guarantee and are clearly linked to the objectives of the action.

Where appropriate development opportunities arise close to the end of the grant period, and it is not reasonably possible for the activity to take place before the grant end date, the UKRI may consider no-cost extension requests for up to 6 months on an exceptional case-by-case basis, where:

- the activity clearly supports the development of the fellow or researcher;
- the activity is directly linked to the research action; and
- the costs remain consistent with eligible RTN expenditure.

These must follow eligible costs under the Guarantee. For questions regarding the eligibility of specific proposed costs, please email EUgrantsfunding@ukri.org.

- 12.13.2. RTN costs can be used towards the costs of going on secondment, including making payments to the secondment host directly to cover their related costs. This includes secondments which are specifically set out in the original proposal and secondments where the details are determined during the lifetime of the grant.
- 12.13.3. For MSCA Guarantee Staff Exchanges, the scheme aims to benefit staff members through exchanging knowledge, skills and boosting career development. If the institutional contributions per person-month are lower than originally expected, the funds can be used to cover additional training, transfer of knowledge, and networking activities, for example. All spend must continue to follow the cost eligibility rules of the Guarantee.

12.14. Management and Indirect Contributions

- 12.14.1. MSCA Guarantee projects have flexibility to use the management and indirect costs contributions as required for the successful implementation of the project. These contributions should be used for researchers' project management costs for these grant types.
- 12.14.2. Host institutions should not charge institutional overheads beyond the amount covered by the total maximum sum of management/indirect costs units.

13. MSCA Postdoctoral Fellowships

13.1. Start Dates

- 13.1.1. The MSCA Guarantee Postdoctoral Fellowships will align with MSCA standard practice with 1 September 2023 being the latest start date for the 2021 call, 1

September 2024 is the latest start date for the 2022 call and 1 September 2025 is the latest start date for the 2023 call.

- 13.1.2. It may be possible to change the specified start date for the fellow, with approval from UKRI. It will be permitted on a case-by-case basis. In order to request this, Change Request on the grant need to be raised. Please see [Appendix A](#) for requests to extend the start date.

13.2. Deliverables

- 13.2.1. Although deliverables (such as a career development plan and data management plan) should be developed and maintained for the project and the fellow in line with MSCA procedure, it is not necessary to submit this to UKRI. However, the plans should be made available to UKRI upon request.

13.3. Non-fellowship activities

- 13.3.1. Academic-hosted applicants may spend up to 6 hours per week of their time on non-fellowship activities and still claim for the full 100% of a fellow's time. This allows for existing teaching, managerial and administrative responsibilities an applicant may have. To do more than 6 hours, time spent on the grant will need to be reduced.

13.4. Changes to Working Time

- 13.4.1. UKRI will consider requests to change MSCA Guarantee Postdoctoral Fellowship grants to part-time and extend the grant duration. Grant holders should apply to change their percentage of hours on a grant by submitting a change request or emailing EUgrantsfunding@ukri.org. UKRI will be aligning with the European Research Executive Agency's (REA) policy of a minimum of 50% of time working on the grant.

13.5. Transfers

- 13.5.1. In exceptional circumstances UKRI will consider changes to MSCA Guarantee Postdoctoral Fellowships grants. Please submit a grant holder change request with the documents required as per below.

Exceptional circumstances, in line with MSCA rules, include:

- the PI (supervisor) moving host institute, then the fellow can follow them
- a severe relationship breakdown and no other suitable PI at current host institute

Cases that would not be viewed as exceptional in line with MSCA rules:

- fellow secures a lectureship at another host institute
- fellow wants to move host institute to relocate for family reasons e.g., partner has a new job

- 13.5.2. For a [change of UK-based host organisation](#), UKRI will require:

- an additional supporting letter from the current supervisor to confirm that the research environment being moved to at least matches the current host organisation for the benefit of the fellow
- an additional supporting letter from the proposed supervisor to confirm they are happy to supervise and support the fellow
- confirmation from the fellow themselves that they are happy with the move.
- the name of the new department within the new host institution.

13.5.3. The supervisor, affiliated to the host organisation, can remain as the supervisor to the fellow despite being linked to another university. However, the arrangement cannot impact the project outputs or the support and development of the fellow. Please submit the following documentation as supporting evidence to EUGrantsFunding@ukri.org:

- a supporting letter from the host organisation to confirm the project and the support for the development of the fellow will not be impacted by the arrangement
- a letter from the supervisor stating the arrangement does not affect their commitment to the project and the fellow
- confirmation from the fellow themselves that they are happy with the support and development received.

UKRI will respond with the decision via email.

13.6. Secondments

13.6.1. There are policy variations depending on the type of postdoctoral fellowship, as below.

Any proposed secondments for European Postdoctoral Fellowships cannot exceed one third of the requested fellowship duration (excluding any additional period for a non-academic placement).

Any proposed secondments for Global Postdoctoral Fellowships are permitted for up to one third of the outgoing phase. A maximum of three months of such secondments can be spent at the start of the project at the beneficiary (or associated partners linked to the beneficiary), allowing the researcher to spend time there before going to the associated partner in the Third Country. This period of maximum three months will be considered as part of the outgoing phase. Secondments cannot take place during the mandatory 12-month return period.

13.6.2. For secondments which have not been included in the original proposal, UKRI will be aligning with MSCA's policy. The secondment should be in line with the project's objectives and add significant value to the fellowship. No additional funding will be made available to cover the secondment and the secondment details should be covered in the contract between the fellow and the host organisation.

13.6.3. To approve this change to what was initially planned, an additional letter from the UK host organisation is required to provide:

- confirmation that the proposed host for the secondment will provide the necessary supervisor, environment and facilities to ensure that the fellow is fully supported whilst on secondment
- the value and impact this would add to the project
- the duration of the secondment
- the fellow's agreement and assurance that the proposed changes won't undermine the rest of project (this can be included via email from the fellow themselves).

This must be a PDF on headed paper from within the host organisation and can be submitted back via email to EUgrantsfunding@ukri.org which UKRI will manually attach to the grant whilst assessing the case. The outcome of the review will be communicated by UKRI via email.

13.7. Other Placements and Visits

13.7.1. Non-academic placements, which were not included in the proposal, may be added to fellowships. UKRI will align with MSCA's policies on the inclusion of non-academic placement periods. No further funding will be made available, but a no-cost extension can be requested to cover the duration of the placement.

13.7.2. The placement should be an additional period of time at the end of the fellowship, maximum of 6 months in duration. It should include supervision, be in line with the project's objectives and add significant value to the fellowship. No additional funding will be made available to cover the placement if it wasn't included in the original proposal and the non-academic placement details should be covered in the contract between the fellow and the host organisation.

13.7.3. To approve this change to what was initially planned, an additional letter from the UK host organisation is required to provide:

- confirmation that the proposed host for the non-academic placement will provide the necessary supervisor, environment and facilities to ensure that the fellow is fully supported whilst on placement
- assurance that the placement will add value and impact to the project
- the duration of the placement
- the fellow's agreement and reasoning for wanting to include the non-academic placement (this can be included via email from the fellow themselves).

This will need to be a PDF on headed paper from within the host organisation and can be submitted back via email to EUgrantsfunding@ukri.org which UKRI will manually attach to the grant whilst assessing the case. The outcome of the review will be communicated by UKRI via email.

- 13.7.4. Short-stay visits, which were not included in the proposal, may be added to fellowships. UKRI will align with MSCA's policies on the inclusion of short stay visits where they can be included as the need arises during the fellowship. No further funding will be made available, but a no-cost extension can be requested to cover the duration of the visit if required.
- 13.7.5. The short stay visit does not follow a set duration, but it should be proportionate and represent a small part of the fellowship. It does not require defined supervision but should be in line with the project's objectives and add significant value to the fellowship. No additional funding will be made available to cover the short visit if it wasn't included in the original proposal.
- 13.7.6. To approve this change to what was initially planned, an additional letter from the UK host organisation is required to outline:
- the proposed location for the short stay visit
 - how the short visit will add value and impact to the project or fellow's development
 - the duration of the visit
 - the fellow's agreement and reasoning for wanting to include the visit (this can be included via email from the fellow themselves).

This will need to be a PDF on headed paper from within the host organisation and can be submitted back via email to EUgrantsfunding@ukri.org which UKRI will manually attach to the grant in the system whilst assessing the case. The outcome of the review will be communicated by UKRI via email.

13.8. Global Fellowships

- 13.8.1. The Horizon Europe Guarantee will cover MSCA Global Fellowships that have their return phase hosted by a UK institution in the original proposal.
- 13.8.2. UKRI will require a partnership agreement between Associated Partners and host organisations for the outgoing phase of a Global Postdoctoral Fellowship. UKRI expect a partnership agreement to be recorded between all parties where required to ensure that any specific provisions are covered. This agreement should be made available to UKRI upon request.

13.9. Remote Working

- 13.9.1. Fellows are ordinarily expected to perform their work in-person at their host institution as far as reasonably possible. If a Guarantee MSCA Postdoctoral Fellow intends to work remotely on a permanent basis, they must request permission by emailing EUGrantsFunding@ukri.org, copying their supervisor in the email, with an explanation as to why long-term remote working will be necessary, detailing:
- the reason for wanting to work remotely

- how much time, if any, to be spent at the host organisation
- the frequency and duration of any visits to the host organisation
- how the project as outlined would be affected by the fellow being based overseas and any mitigations in place
- how the fellow will receive the support and development originally planned
- how the host organisation will comply with organisational policy and UK laws for the fellow's employment, while the fellow is based overseas.

13.10. Termination

- 13.10.1. To terminate a live MSCA Guarantee Postdoctoral Fellowship, a grant maintenance request will need to be made. Please see [Appendix A](#) for further instructions.

A termination request can be made if the live project is:

- no longer viable due to an irreplaceable person leaving the project (the fellow)
- failing

- 13.10.2. A date must be chosen for the termination in the request. UKRI will need to see evidence of the fellow agreeing to the termination reasoning, which can be added as an attachment to the termination request.

13.11. Confirmation for Completion of MSCA Guarantee Postdoctoral Fellowships

- 13.11.1. Under the UKRI Guarantee, MSCA Certificates are not issued to MSCA Guarantee Postdoctoral Fellows. However, researchers may request a Letter of Confirmation as evidence of participation in the fellowship.
- 13.11.2. To request a Letter of Confirmation, please email EUGrantsFunding@ukri.org with a Research Organisation (RO) headed letter confirming the:
- full name of the researcher and their supervisor
 - grant reference number and project title
 - fellowship completion date.
- 13.11.3. Upon receipt and an internal review of your request, a headed Letter of Confirmation by email will be issued recognising the MSCA award under the UKRI Guarantee.

14. MSCA Doctoral Networks (DN)

14.1. Eligibility and Recruitment

- 14.1.1. Awardees are expected to follow the MSCA eligibility rules for the recruited researchers and staff members as well as following the specific obligations as found in the annotated [Horizon Europe Model Grant Agreement](#) related to recruitment (Article 18, page 97), contract requirements (Article 6), and working

conditions (Article 18, page 97). As such, doctoral candidates should be recruited on an employment contract, in line with MSCA policy and not as students paid with a stipend as would be normal UKRI policy.

- 14.1.2. The standard MSCA mobility rule (i.e., the candidate should have spent fewer than 12 months of the 36 months immediately prior to the call deadline in the UK) will apply for UK participants in Doctoral Networks funded by the Guarantee. However, if a host organisation has an exceptional candidate who doesn't follow the standard rule, please submit the details to EUgrantsfunding@ukri.org and UKRI will review it on a case-by-case basis.
- 14.1.3. UKRI does not require notification of successful recruitment. The only instance where UKRI must be made aware is if the candidate does not meet the MSCA mobility rule, as above.
- 14.1.4. Details surrounding the recruitment and development of the PhD student can be reported directly via Researchfish from the February/March 2025 submission period onwards. However, the details surrounding the recruitment and the further development of the PhD student should be made available to UKRI upon request.
- 14.1.5. Awarding institutions must be based in the UK to be funded through the Guarantee scheme. UKRI expects the students to be placed at a UK university, as otherwise the policy to support activities based in the UK is not being fulfilled. The mobility of able students to the UK is the key facet of this scheme under the Guarantee.

14.2. Project-wide Costs

- 14.2.1. UK beneficiaries will be able to transfer some of the UKRI funding to cover project-wide activities. These costs will be eligible under the Guarantee, provided that proof of payment can be provided in line with UKRI's standard terms and conditions. UKRI expects the research organisation to keep an adequate record for its own internal auditing procedures.

14.3. Doctoral Student Fees

- 14.3.1. Under MSCA standard policy, university practice varies as to what fees are charged for Doctoral Networks students, and by extension the Guarantee will align with this policy. The rate can be charged at a domestic or international rate but will be at the discretion of the UK-based host organisation.
- 14.3.2. Fees cannot be charged to the doctoral candidate and must come from the institutional unit costs. As the doctoral candidates are recruited as staff, if the university would offer their staff a reduced or waived fee this must be offered to the MSCA recruited researcher.

14.4. Transfers

- 14.4.1. It may be possible to transfer UK-based MSCA Guarantee Doctoral Networks grant to [another UK-based organisation](#). An extra letter of support from the new host institution is required, which can be supplied with the Funding Service application during submission. If the grant is already submitted, then the letter can be sent by email to EUgrantsfunding@ukri.org. Please see [Appendix A](#) for the process of grant transfers.

The support letter must:

- explain the rationale for the move and affirm that the new host will provide the necessary environment, facilities, and support to ensure the project can proceed successfully
- be a PDF on headed paper from a senior representative within the host institution (i.e. an individual capable of speaking on behalf of the host institution)
- be accompanied with confirmation from the coordinator of the project that the consortium is happy with the proposed change to the UK-based partner to be funded through the Guarantee. This can be an attachment of the email confirmation of the approval by the coordinator of the consortium.

- 14.4.2. UKRI also require a copy of the amended grant agreement from the European Commission's portal when the change has been made in the official documentation. This can be submitted via email to EUgrantsfunding@ukri.org once finalised and it will be attached retrospectively to the Guarantee grant.

14.5. Doctoral Candidates leaving part way through the project

- 14.5.1. You must notify the Guarantee team if a Doctoral Networks candidate leaves the project for any reason. If the candidate will not be replaced, then the underspend for the person-months not used will need to be returned to UKRI at reconciliation. This includes the allowances for the candidate as well as the management and indirect costs allocated with that candidate.
- 14.5.2. In line with MSCA rules, it is possible under certain circumstances to recruit a replacement candidate for Doctoral Networks research projects. Please note that the Guarantee will not provide any uplift in funding for a replacement candidate. Please email EUGrantsFunding@ukri.org with the following information for the request to be considered:
- Grant reference
 - The dates that the original candidate started and left the project
 - The number of person-months remaining
 - Proposed method of funding the replacement candidate should the person-months remaining not be enough to fund the entire studentship

- Details of proposed replacement process (e.g., whether candidate will come from previous short listing round, an existing PhD student at the institution, or a new recruitment round)
- Estimated start date of the replacement and whether a no-cost extension is forecast to be required

All requests will be reviewed on a case by case basis.

15. MSCA Staff Exchanges

15.1. Secondments

- 15.1.1. UKRI will honour the original planned exchanges under the Guarantee, even if they do not explicitly appear in the grant agreement. These include:
- secondments from the UK based associated partner to a beneficiary in an EU Member State or Associated Country
 - secondments from the UK based associated partner to a third country eligible for EC funding
 - secondments from the UK based associated partner to a third country not eligible for EC funding
 - secondments from a third country eligible for EC funding to the UK based associated partner.
- 15.1.2. The same level of funding as applied for in the original budget will be provided under the Guarantee to cover these exchanges. Standard staff and secondment eligibility rules will apply. UKRI will accept flexibility in how the budget is used to meet the needs of the project, including changes to the planned secondments.
- 15.1.3. Time spent travelling reflects time spent working on the secondment. Adequate records should be kept according to the host organisations internal auditing procedures. UKRI's normal funding assurance processes will be followed, so UKRI would expect good records to allow an audit if required. More information can be found on UKRI's funding assurance programme pages.

15.2. Allowances

- 15.2.1. The Guarantee will require that the full value of the unit costs under the heading 'Contributions for seconded staff members' is paid to the seconded staff member by the end of the project. In line with MSCA practices, Guarantee grant holders have the flexibility to spend the allowance according to their usual practice, provided the full allowance is spent.
- 15.2.2. Payments for top-up allowances are paid quarterly in arrears based on UKRI standard processes. The payment of the top up allowance can be paid in advance by the awarded research organisation if required for staff members, so they do not have to wait for reimbursement of any significant upfront costs. This is allowable whilst

following the total applicable unit contributions as listed in the corresponding MSCA work programme. To change the payment profile of the grant, please email EUgrantsfunding@ukri.org and UKRI can investigate whether this is possible.

15.3. Transfers

- 15.3.1. It might be possible to transfer UK-based MSCA Guarantee Staff Exchanges grant to [another UK-based organisation](#). An extra letter of support from the new host institution is required which can be supplied with the Funding Service application during submission. If the grant is already submitted, then the letter can be sent by email to EUgrantsfunding@ukri.org. Please see [Appendix A](#) for the process of grant transfers.
- 15.3.2. The letter must:
- explain the rationale for the move and affirm that the new host will provide the necessary environment, facilities, and support to ensure the project can proceed successfully
 - be a PDF on headed paper from a senior representative within the host institution (i.e. an individual capable of speaking on behalf of the host institution)
 - be accompanied with confirmation from the coordinator of the project that the consortium is happy with the proposed change to the UK-based partner to be funded through the Guarantee. This can be an attachment of the email confirmation of the approval by the coordinator of the consortium.
- 15.3.3. UKRI also require a copy of the amended grant agreement from the European Commission's portal when the change has been made in the official documentation. This can be submitted via email to EUgrantsfunding@ukri.org once the finalised and it will be attached retrospectively to the Guarantee grant.

15.4. Additional Funding

- 15.4.1. The process to receive the additional funding for Third Country-Third Country secondments will require a letter from the coordinator of the MSCA Staff Exchanges project to confirm:
- that the secondment is eligible according to the consortium agreement and active participation is taking place
 - the costs associated with the secondment are not being covered elsewhere and there is no risk of double funding within the project

An email from a representative within the UK organisation (someone capable of speaking on behalf of the organisation) is also required, stating:

- the Je-S or the Funding Service grant reference number, the name of the Principal Investigator or Project Lead and project title

- the total amount of person months being claimed under the Guarantee to cover the secondment and acceptance that the UK organisation is responsible for declaring these costs to UKRI.

An amended version of the UKRI cost conversion tool which reflects the additional allowance in GBP (£) must also be provided. This can be found on the [Guarantee funding for MSCA additional allowances for live grants](#) page on the website.

- 15.4.2. Requests for additional funding can be made as part of the application. Please add the above documents as additional attachments in the submission.
- 15.4.3. If the funding is required whilst the grant is active, a request will need to be submitted. Please see [Appendix A](#) for how to submit a request for additional allowances on Je-S or the Funding Service. The additional funding will appear in the quarterly profile for the duration of the grant.

15.5. Doctoral Students

- 15.5.1. Doctoral candidates are eligible to participate in MSCA Guarantee Staff Exchanges projects. As per the MSCA Staff Exchanges rules, PhD students are regarded as “staff members” provided they fulfil other Staff Exchanges conditions, e.g., seconded staff need to be committed full-time to the MSCA Guarantee project during the secondment.
- 15.5.2. MSCA Guarantee Staff Exchanges allow self-funded PhD students or students on fellowships to go on secondment, as long as their relationship is compliant with UK legislation. However, the sending institution and the seconded fellow must have a contract or agreement in place, which puts him/her under the directions of the sending institution – the sending institution must be able to provide assurance that the seconded fellow will perform the tasks set out in the original proposal and grant agreement. The seconded fellows also must be seconded full-time, for at least one month or weeks that add up to one month (30 days) to the same hosting institution, in order for this month to be eligible for funding. They must have worked at the sending institution for at least one month before the secondment.

16. MSCA COFUND

16.1. Applying

- 16.1.1. The Guarantee will cover the EU contribution where Implementing Partners are clearly listed in Part B Section 5 Partner Organisations of the original proposal. When completing the UKRI conversion tool, please multiply the number of recruited researchers by the corresponding COFUND allowance. The letter of commitment as well as the original proposal and grant agreement should be included in submissions. If required, additional attachments can be submitted.

16.2. Allowances

- 16.2.1. The Guarantee will require that the full value of the unit costs under the heading 'Contributions for recruited researcher' is paid to the recruited researcher/student by the end of the project.

16.3. Remote Working

- 16.3.1. Seconded staff members and research staff, excluding Principal Investigators, employed on the grant are able to work remotely on a permanent basis if the research project allows, as long as organisational policies are adhered to. In accordance with standard UKRI policy, the host organisation continues to be wholly responsible for their terms and conditions of employment including any additional laws for overseas staff.

Appendix A: Managing Grants in Je-S and the Funding Service

ERC and MSCA Guarantee Grants will be moving from Je-S to the Funding Service.

The move from Je-S to the Funding Service is part of an organisation-wide transition which is being led by UKRI's Simpler and Better Funding (SBF) programme. This change only affects ERC and MSCA grant types. All non-ERC and non-MSCA grant types currently hosted on the Innovation Funding Service (IFS) will continue to be hosted on IFS.

The [UKRI website](#) contains guidance for managing all UKRI-funded grants. For ERC and MSCA grants hosted on Je-S, specific guidance for grant management is available in the [Je-S handbook](#). The following sections contain guidance on both Je-S and the Funding Service processes.

Accepting and Starting Awards

In the Funding Service

To start an award, go to the award overview page and select Start Award to be taken to the start confirmation form. The start confirmation will need to be submitted within 42 days of the date the project started. Any kind of eligible grant expenditure may be used to trigger the submission of the start confirmation.

Further guidance is visible across the top of the page with information about starting awards. The start date entered can be either a date from the past or the day the form is complete. It cannot be a date in the future. Once the form is completed with the required information, the award can start.

In Je-S

After the research development manager or officer at the host institution accepts the award through Je-S, a start confirmation document will be sent with the start date of the project. The host institution must submit this through Je-S within 42 days of the date the project started. Any kind of eligible grant expenditure may be used to trigger the submission of the start confirmation.

More information about Starting of Awards can be found on the [UKRI website](#).

Additional Funding Streams: Secondments and Allowances

In the Funding Service

Additional Funding Streams are not currently available to be requested through the Award Management function in the Funding Service. Instead, please email EUGrantsfunding@ukri.org with the required details and supporting evidence and the Guarantee team will make the request through internal systems.

In Je-S

Please raise a Generic Change Request. Additional supporting documents should be uploaded with the request as noted above. Please note only one attachment may be added to grant maintenance requests; if more than one document is required, please insert all supporting documents into a single PDF attachment.

Project Changes and Requests: Start Date Extensions, End Date Extensions, Suspensions, and Resumptions

In the Funding Service

Please navigate to Award Overview and scroll down to Manage Award. Click Change Request and follow the steps to request the change. Please ensure to include a detailed justification in the text box.

In Je-S

Please raise the relevant [Change Request](#) through the grant maintenance request process. Any additional supporting evidence should be uploaded with the request. Please note only one attachment may be added to grant maintenance requests; if more than one document is required, please insert all supporting documents into a single PDF attachment.

Project Changes and Requests: Transfers, Terminations, Staff Changes

In the Funding Service

These changes are not currently available to be requested through the Award Management function in the Funding Service. Instead, please email EUGrantsfunding@ukri.org with the required details and supporting evidence and the Guarantee team will make the request through internal systems.

In Je-S

Please raise the relevant [Change Request](#). Additional supporting documents should be uploaded with the request as noted above. Please note only one attachment may be added to grant maintenance requests; if more than one document is required, please insert all supporting documents into a single PDF attachment.

For Transfers, the request should be submitted by the original host organisation in Je-S and a grant transfer response will be sent to the new host organisation to accept.

If an offer has been accepted but the grant is not yet active, the grant holder should email EUGrantsfunding@ukri.org with the additional letter and confirmation from the coordinator as outlined above. It may be possible to retract the offer letter, or the grant may need to be treated as a transfer.

Appendix B: Version Control

Version	Date Published	Changes
1.0	25 April 2025	Guidance has been reformatted, reordered, and renumbered. Guidance specific to Horizon Europe Guarantee grants administered via Je-S/TFS and those administered via IFS has been separated into 2 documents. New guidance added: 9.2.1: No-cost Extensions Necessary for Final Project Reporting 12.9: Long-term Leave Allowance - Appendix A: Managing Grants in Je-S and the Funding Service Further clarification provided on MSCA institutional unit contributions (excess RTN budget, virement between institutional funding units). Clarification on calculation of ERC Indirect costs for transfer expenditure statements (TES).
1.1	29 July 2025	1.4 & 10.6.2: Guidance has been updated to include information on closing the Guarantee to new applications.
1.2	29 October 2025	Guidance has been revised for accessibility. 1.4: further clarification on the closure of the Guarantee to new applications. 4.5: clarification around consortium budgets going over the total allocated award. 4.5.5: clarification around funding for international affiliated entities. 4.6: details on eligibility of IHI call 11 and a parallel Diabetes UK funding opportunity. 4.6.5-4.6.9: clarification around FPA and SGA grants 5.1.6: exchange rate updated.

		○ 10.4.2: Inclusion of contact email address for branding pack ○ 10.7.1: Restructure of Call Names table ○ 10.10.1: Clarification of wording related to researcher presence in the UK ○ 10.13.5: Added guidance on timelines for extension requests. ○ 10.14.1-2: Added guidance on timelines for requests to transfer a grant to a new organisation. ○ 11.7.4: Clarification that transferring an ERC grant which has incurred expenditure is outside the scope of the Horizon Europe Guarantee. ○ 11.12.1: Clarification of language relating to travel and subsistence costs. ○ 11.20.1: Updated policy and guidance related to timekeeping and reporting. ○ 12.7.4: Addition of guidance related to recovery of Family Allowance. ○ 12.12.3: Clarification of text 12.14: clarification of wording. 13.5.2: link added, and clarification of requirement for an additional supporting letter from the proposed supervisor in the case of a transfer. 13.11: new section on confirmation for completion of MSCA Guarantee Postdoctoral Fellows. Appendix A: clarification of wording.
1.3	10 th February 2026	10.21.4 ResearchFish information updated for 2026 11.18.2 additional guidance for claiming DSA on ERC grants 14.5 new guidance for replacement of MSCA Doctoral Networks candidates
1.4	5 th March 2026	4.1 new section on ERC grant transfer to the UK from Europe Changes for document accessibility
1.5	8 th April 2026	4.1 section on ERC grant transfer to the UK from Europe removed to remove duplication with section 11.7 5.6: inclusion of Research Ethics, linking to the UKRI Good research resource hub 8.1.7: clarification about Open Access costs

		8.1.9: clarification about alcohol cost eligibility. 11. 7 new section on ERC grant transfer to the UK from Europe 11.21 new section on PhD Student Absence Costs for ERC grants revision of Changelog entries for July and October 2025 for formatting and completeness
1.6	July 2026	4.5.5. clarification added about cost eligibility of including UK-based affiliated entities of Guarantee grant holders. 4.5.6. updated numbering 5.1.6 period covered by exchange rate for new applications in 2026 corrected 8.2-8.2.6. use of funds for additional strategic activities 12.9.5 and 12.11 removal of specific duration of 12 months for long term and maternity leave 12.13.1 guidance regarding MSCA RTN underspend revised to allow limited NCE for up to 6 months 15.6 removed from guidance