



TurkeyinFP7
Cooperation | Research | Technology

*This project is co-financed by the European Union
and the Republic of Turkey*

FP7 Project Proposal Preparation, Submission and Project Management Training Programme

Day 2

26th November 2013 – Dedeman Hotel, Gaziantep



Agenda

09:00 – 10:00	Impact
10:00 – 10:30	Implementation (1)
10:30 – 10:45	<i>Coffee Break</i>
10:45 – 11:45	Implementation (2)
11:45 – 12:00	Other Considerations
12:00 – 12:30	Finishing Touches
12:30 – 13:30	<i>Lunch</i>
13:30 – 14:00	Proposal Evaluation
14:00 – 14:30	Role of Coordinator
14:30 – 15:00	Consortium Agreement
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15:15 – 16:00	Contract Negotiation
16:00 – 17:00	Project Management Basics
17:00 – 17:30	Preparing for Horizon 2020

Objectives

- Developing strong impact and implementation sections
- Understand the evaluation process
- Being the project Technical and Administrative leader
 - Overview of responsibilities
- Pitfalls and best practice to run smooth negotiations
- Building a strong consortium agreement
 - Templates and dos and don'ts
- Understand the EC requirements for Knowledge management
- Understand the basis of good project management and reporting

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Writing Skills Impact

Preparation of Impact Section

- **2.1 Expected impacts listed in the work programme**
 - Evaluators looking to establish the size and nature of the potential impact your project will have on the impacts specified in the work programme
- **2.2 Measure for Communicating the Project and Disseminating the Results**
 - ✓ Evaluators looking to see you are systematically and effectively communicating the project and its outputs to relevant stakeholders
- **2.3 Specific Measures for Use and Exploitation of Project Results, and Management of Intellectual Property**
 - Evaluators looking to see you are giving your outputs the best chance to realise the potential impacts

2.1 Expected Impacts Listed in the WP **TurkeyinFP7**

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Guide for Applicants

- Describe how your project will contribute towards the expected impacts listed in the work programme
- What steps will be needed to bring about these impacts
- Explain why a European rather than a national or local approach is needed
- Indicate how account is taken of other national or international research activities.
- Mention any assumptions and external factors that may determine whether the impacts will be achieved.

2.1 Expected Impacts Listed in the WP **TurkeyinFP7**

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What the Evaluator will look for

- What are your claimed impacts
 - Market Information, opportunity, likely penetration
 - Social
 - Environmental
 - Other, political, legislative, FP7 specific, etc
- How they compare with the existing status
 - Needs identified in the call
 - Problems you identified in your logic train
- What is their significance – quantified/realistic
- How they are going to be achieved
- Who will be doing what to achieve them
- What timescales will they be achieved over
 - Within consortium
 - Outside consortium

Do Your
Research!

Ensure
Consistency
with Partner
Profiles!

Expect Impact

Call Specific Impacts

Need to address the required impacts stated in the call for proposals

Generic Impacts

Need to address the wider generic impacts of the FP7 programme

Expected Impacts

Strategic and Economic Impacts

- The ***Europe 2020 Strategy***
 - Vision for Europe's social market economy over the next decade
- 5 representative EU-level targets
 - 75 % of the population aged 20-64 should be employed
 - 3% of the EU's GDP should be invested in R&D
 - The "20/20/20" climate/energy targets should be met
 - At least 40% of the younger generation should have a degree or diploma
 - 20 million less people should be at risk of poverty

Expected Impacts

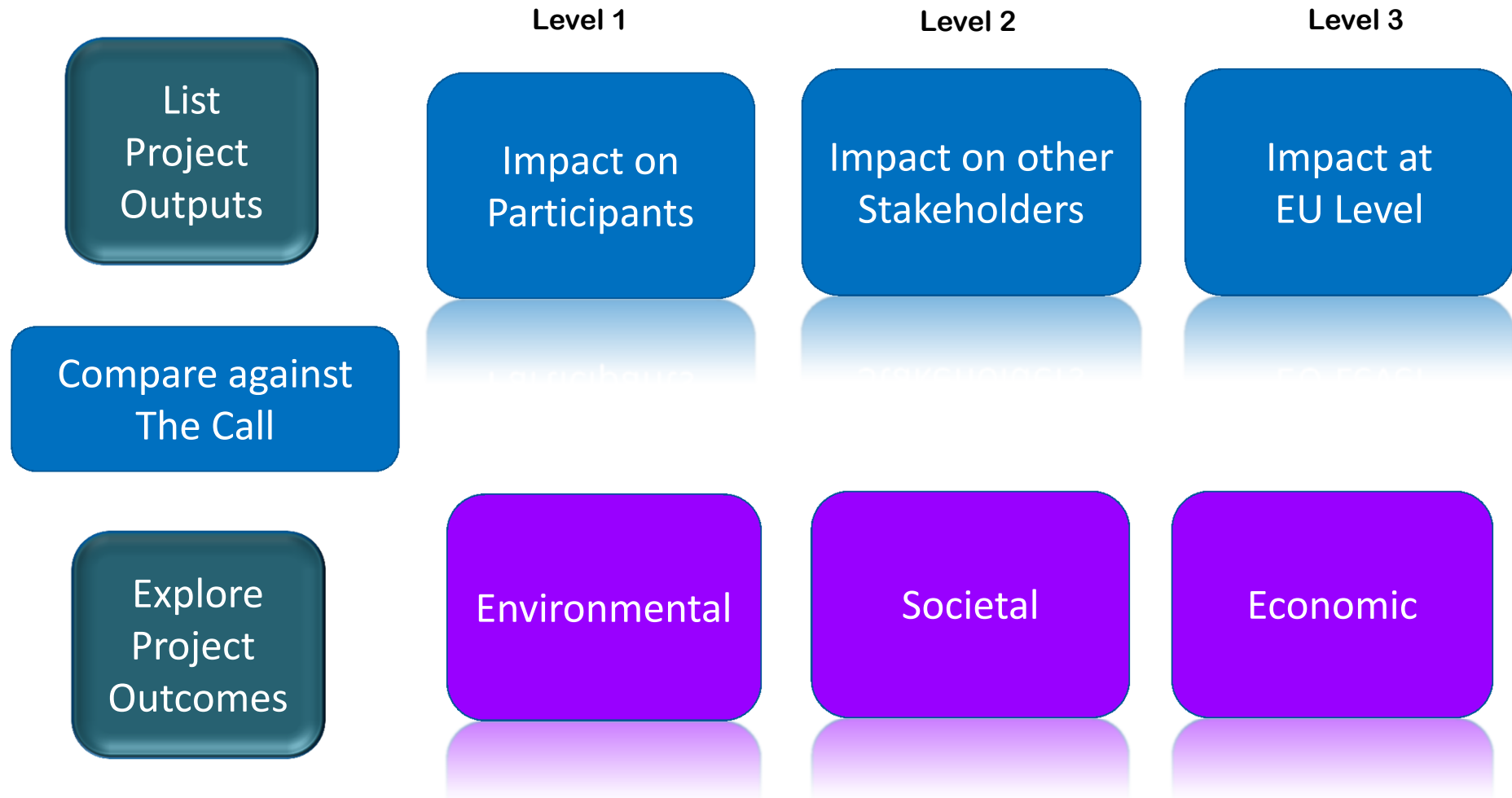
- End results of a Project = **‘Something of Value’ to ‘Someone’**
- Potentially a medium to long period before **‘application/use’**
 - For STREPS – 5-10 years
 - For IPs – 2-5 years
 - For Capacities – 1-3 years
- **How** will you move from the end of the project to the point where you can start to have an impact?
- **Research for SMEs:** clear economic impact for the SME participants, improving their industrial competitiveness across the EU

NOTE:

H2020 is nearer market than FP7

Expected Impacts

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Expected Impacts

Mention

- Further technical development (be explicit)
- Tests or clinical trials to allow it to be placed on the market
- Production, sales & distribution resources needed to reach the market
 - At least in Europe
- Structure of the market
 - Who do you need to sell to?
 - How many people need this for it to have the expected impact?
 - What broad markets can this be applied to?
- Timescales to do the above (2 - 5 years)
- Assumptions & risks in achieving the impacts stated

Expected Impacts

Economic & Competitiveness Benefits

- Additional turnover for all European licensees
- Increased productivity of end users
- Reduced Energy/Materials/consumables Costs
- Increased Quality and Reliability
- Improved Functionality
- Creation/protection of Employment (Wealth & Social security)

Quantify in €M p.a.

Add “Creating/safeguarding xx Jobs”

Competitiveness

- Reduced imports
- Increase domestic sales into Europe
- Increase exports into global markets
- Cost savings on the product/process/system

Quantify in €M p.a.



From Europe-map.org

Market Statistics

- <http://ec.europa.eu/enterprise/library/index.htm> – European publications related to enterprise and business
- http://ec.europa.eu/enterprise/sectors/index_en.htm – market figures for a number of industry sectors
- http://ec.europa.eu/enterprise/enterprise_policy/industry/com_2005/sec_2005_1216.pdf – data on the competitiveness of EU sectors
- <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home> – European statistics on manufactured goods
- http://trade.ec.europa.eu/doclib/cfm/doclib_results.cfm?key=&opt=1&dis=20&lan=all&ty=Statistics - European import/export trade statistics
- http://www.researchwikis.com/Main_Page – free market research reports for a large number of areas

Relevance to 'EU Policy'

- **Europa** (Official EU Website) <http://europa.eu>
 - White Papers = Policy Documents
 - Green Papers = Discussion Documents - start of policy process
 - http://europa.eu/documents/comm/index_en.htm
- **SCAD+** - Summaries of EU legislation
http://europa.eu/legislation_summaries/index_en.htm
- **EUR-lex** - Database of EU law, including the Official Journal, treaties, case law and parliamentary questions - <http://eur-lex.europa.eu/en/index.htm>
- **Prelex** - decisions and laws in the pipeline
<http://ec.europa.eu/prelex/apcnet.cfm?CL=en>
- **Eurostat** <http://epp.eurostat.ec.europa.eu>
- **Grants & Loans** (financial transparency system)
http://ec.europa.eu/beneficiaries/fts/index_en.htm

Societal impacts

- **Quantifying improvements to**
 - Quality of life
 - Health & safety
 - Working conditions & employment opportunities
 - Improving levels of skills & education
 - Environmental aspects
- **Describe** the issues addressed & **quantify** the realistic impact
 - In people numbers
 - Justify any improvement generated
 - Relative to market/affected population size and estimated market penetration
- Direct or indirect impact

Societal impacts

- OECD - www.oecd.org/els/social
- The Futures Report - <http://www.steria.com/sharing-our-views/your-challenges/challenges-news-detail/article/the-futures-report-2011/>
- Society, the Endless Frontier - http://europa.eu/comm/research/publ/society_en.html
- EU and NGOs - http://ec.europa.eu/civil_society/ngo/index_en.htm
- EU Special Interest Groups - http://ec.europa.eu/civil_society/interest_groups/measure/intro_mes_en.htm
- Help in calculations of reduction in CO2 emissions - www.thecarbontrust.co.uk/foundation

Environmental impacts

- **Quantifying improvements to**
 - Energy Efficiency
 - CO₂ Footprint
 - Other GHG Emissions
 - Conservation of Raw Materials
 - Reduction in Waste Generated
 - Potential for Recycling/ReUse
- **Describe** the issues addressed and **quantify** the realistic impact
 - In tonnes
 - Justify any improvement generated
 - Be consistent with the rest of your project and put in context
 - Address any negative aspects

Expected impacts - Transnationality

- **European Added Value**
 - Multi-disciplinary
 - Complementarity of skills
 - Critical mass of effort assembled at European level
 - Requires a team of world-class specialists
- **Impact is greater than the sum of that of National projects**

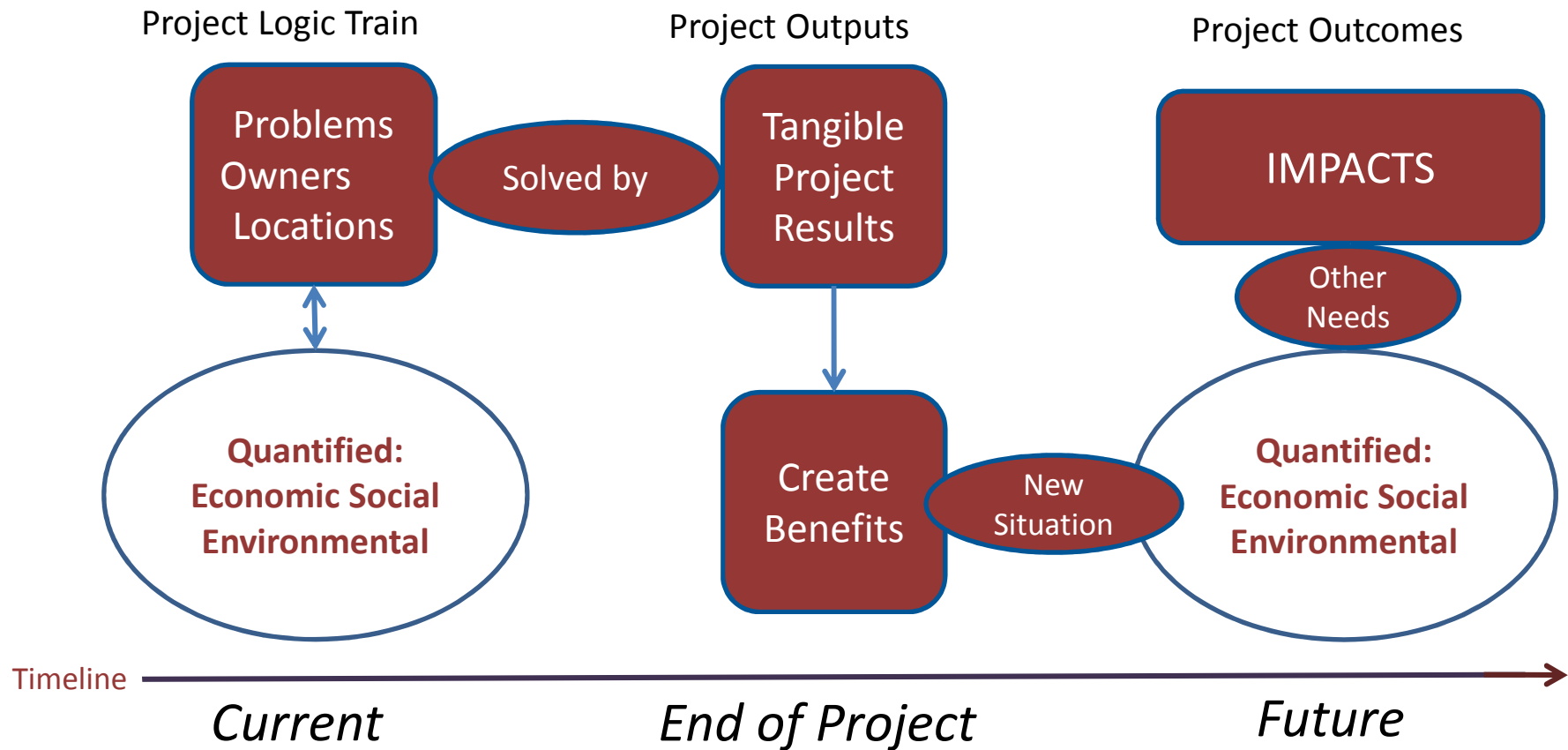
Expected impacts

Contributions to Standards

- Identify safety or product standards (ISO)
- Show how your project conforms to satisfy existing ones
- Contributions to the Development or Dissemination of
 - New standards
 - Codes of Best Practice and Standards
- Identify relevant organisation for each standard

Expected Impacts – Summary

Suggested Methodology



Practical Exercise

Impact sections – “dos & don’ts”

- Compare sections and comment

2.2/2.3 Dissemination/Exploitation

Guide for Applicants

- Describe the measures you propose for the dissemination and/or exploitation of project results
- How these will increase the impact of the project?
- How will you communicate to a variety of appropriate target groups such as policy-makers, interest groups, media and the public at large?

Define Strategies

Develop Action
Plans

Be consistent
with your Work
Packages

2.2/2.3 Dissemination/Exploitation

Dissemination

- Spreading knowledge about your work and results
- Generally passive

Can be in
conflict

Exploitation

- Getting people to adopt/use your results – often for commercial gain
- Protecting your results and giving access to them
- Generally proactive

Useful to appoint an Exploitation
Manager – Preferably from
Industry with appropriate
expertise in this aspect

2.2/2.3 Dissemination/Exploitation

Target Appropriate Stakeholders

- Academic
- Industrial
- Close link with SMEs
- Regional Government Agencies
- Approvals Bodies & Regulatory Authorities
- General public populations
- Consumer Groups

Be Specific:

Who?
Why?
Where?
How?
How many?
How often?

2.2/2.3 Dissemination/Exploitation

Vehicles for Dissemination and Exploitation can Include

- Websites, hot-links, databases, CD ROMs & DVDs
- Scientific publications in journals and academic conferences
- National trade press
- Pre-marketing activities such as editorials and industrial conference papers
- Networks of contacts within partners' supply chain structures
- Technology demonstrator events, road shows
- Major exhibitions, technology stimulation events

Quantify:

Where?
Why?
How many?
How often?

and

Look to measure
effectiveness!

2.2/2.3 Dissemination/Exploitation

Build into a coherent plan of actions during AND after the project

- Consider Intellectual Property (IP) ownership and protection
- Consider access and rights to Background and Foreground IP
- Assign actions, responsible parties and timescales
- Plan measures within your Consortium Agreement (CA) and explain the basic principles
- **Above all be consistent with your logic train and predicted impact**

FP7 Consortium Agreement Models

- Comparison of FP7 consortium agreement models – IPR Helpdesk
 - http://www.ipr-helpdesk.org/documents/ComparisonFP7Models_0000006611_00.xml.html
- Simplified FP7 Model Consortium Agreement
 - <http://www.desca-fp7.eu/>
- Specific Targeted Projects Consortium Agreement (STREPCA)
 - http://www.eicta.org/index.php?id=242&id_article=229
- EC check list for Consortium Agreement
 - ftp://ftp.cordis.europa.eu/pub/fp7/docs/checklist_en.pdf

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Preparation of the Implementation section

- **3.1 Work Plan**
 - Is your project structure logical and coherent
- **3.2 Management Structure and Procedures**
 - Are your management provisions appropriate? How well are your risks identified and addressed?
- **3.3 Individual Participants**
 - Clarity of role and quality of participants
- **3.4 Consortium as a Whole**
 - Quality and appropriateness of the consortium
- **3.5 Resources to be Committed**
 - Are your resources appropriate and well justified

MAXIMUM
PAGE LENGTHS
APPLY

3.2 Management Structure and Procedures

Guide for Applicants

- Describe the organisational structure and decision-making mechanisms of the project.
- Show how they are matched to the complexity and scale of the project.
- Define all significant risks and the mitigating actions proposed

Evaluation criteria

Appropriateness of the management structure and procedures to the requirements of the project

3.2 Management Structure and Procedures

- The Governance of the project



3.2 Management Structure and Procedures

What decisions will be made by the consortium?

- Reallocation of tasks and budgets
- Strategic research decisions
- Admission or elimination of partners
- Define dissemination and IPR plans
- Communication with the Commission (through Coordinator)

The consortium is the executive power over the direction of the project

3.2 Management Structure and Procedures

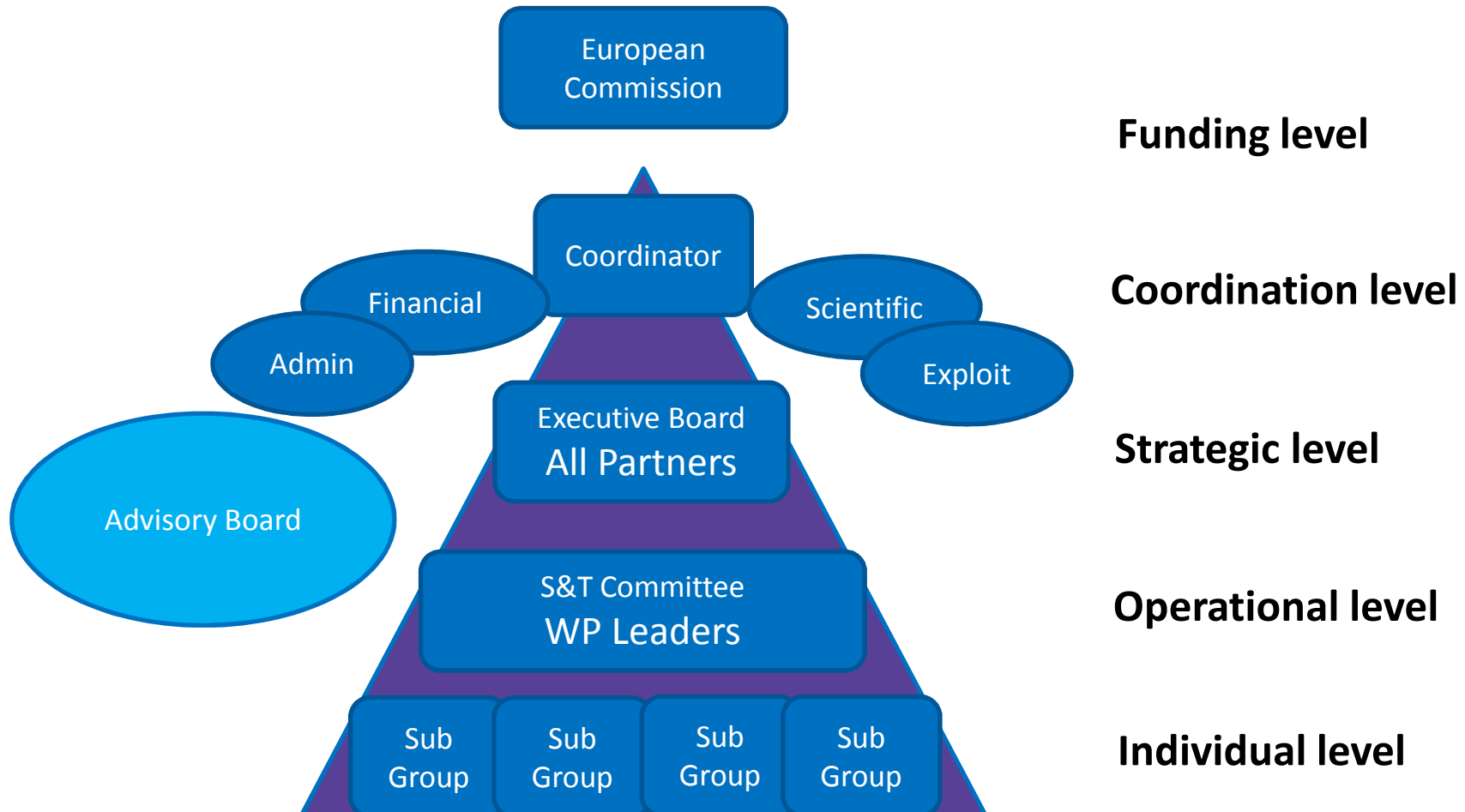
Project Coordinator

- Co-ordination at consortium level of contractual obligations & collective responsibilities
- Supervise legal, financial, contractual, ethical & admin management of the consortium
- Supervise the Consortium Agreement
- Chairing Project Board meetings
- Communications between the consortium & the consortium/EC

Administrative Manager

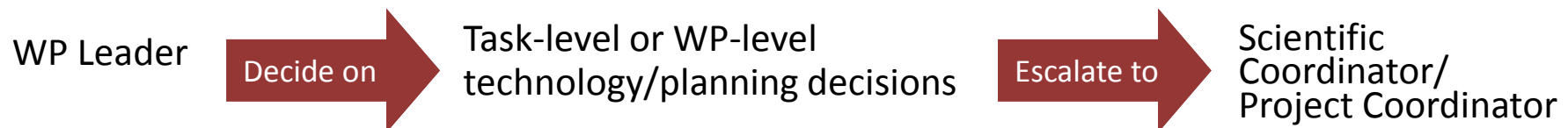
- Collation of deliverables & milestone
- Ensure legal, contractual, ethical, financial & admin management
- Preparing, updating & managing the Consortium Agreement
- Organisation of Project Board & Exploitation Board meetings
- Collation of cost statements & audits
- Preparing for & facilitating EC audits
- Issuing payments

Organisation Structure



Role of various management bodies

- Refer to organisational structure, show how each level has specific responsibilities and who is the person in charge and what are their credentials for this role
- Project board is the ultimate decision maker for the project
- Major decisions on progress made at milestones
- Escalate issues in case of problems:



Conflict Resolution

- Decision taken within each level of the structure
- In case of dispute about the best course of action
 - Project Board or Exploitation Committee will decide
 - By majority voting
- EC can also be consulted
- Third party mediation possible
- Be sure it meets the Programme requirements
- Describe in your Consortium Agreement and be consistent

Meetings and Progress Review

Link meetings with milestones

- Executive Board
 - At least once a year
- S&T Committee – Include detailed milestone reviews
 - At least twice a year
- Sub Project/WP Committee
 - At least every three months
- **Try to Optimise Travel!**

How to handle risk

- **Risk is the chance that an event will occur that will prevent you achieving the stated project objectives**
- **For each of the tasks and project innovations consider:**
 - What could go wrong (Identify)
 - What are the chances that this could happen (Likelihood)
 - What impact would this have for the project (Impact)
 - What mitigation or contingency actions could be taken to Prevent the risk from happen or Reducing its impact (Action)
 - How will implementing the action affect the overall results (Impact of Action)

How to handle risk

- **Show the evaluator that you have considered risk by:**
 - Mentioning that you have undertaken a risk assessment
 - Discussing the identified risks, risk mitigation and contingency strategies (e.g. including a table) and how you have considered them within the project
 - Including milestone control points where key risks have been identified
 - Including risk management activities within the work programme
- **It is essential to consider and discuss risks. This is an important evaluation criteria.**

Key Management Tips

- This section of a proposal is usually the one that has the **least attention**
 - But can make a big difference!
- **Make sure your management section is CUSTOMISED to YOUR Project**
 - Provide a hierarchical diagram
 - Ensure EU Commission and contact with it is represented clearly
 - Justify the coordinator credibility
 - Allocate and explain partner roles in the various management tiers
 - How are decisions taken - scientific, administrative, financial, legal etc?
 - Explain who is responsible for what ensuring they are competent to do this role
 - Ensure that risk management is included in the management structure
 - **Explain what procedures you intend to use and why they are appropriate**
 - Progress monitoring, reporting, meetings, milestone reviews and risk assessment
 - Dispute resolution and voting rights
 - Explain any sub committees and justify them
 - Take care of any project or call specific aspects – eg. role of SMEs
 - Do not forget knowledge management and dissemination/exploitation aspects

3.3 Individual Participants

Guide for Applicants

- Provide a brief description of the legal entity, the main tasks they have been attributed, and the previous experience relevant to those tasks
- Provide also a short profile of the staff members who will be undertaking the work – CV, Previous Projects!

Evaluation criteria

- Quality and relevant experience of the individual participants

3.3 Individual Participants

- If you structured your consortium properly this aspect is straightforward!

- **Brief RELEVANT overview of partner**
- **What will they be doing during the project**
 - Focus on their specific **UNIQUE** roles
 - Describe which WPs/tasks they lead and why
- **Explain the appropriate expertise they bring**
 - Why are they suitable?
 - Why are they the best in EU?
- **Key staff to demonstrate this required expertise (Brief)**

TIP!

Use a standard
template for
each partner

3.4 Consortium as a whole

Guide for Applicants

- Describe how the participants collectively constitute a consortium capable of achieving the project objectives, and how they are suited and are committed to the tasks assigned to them
- Show the complementarity between participants
- Explain how the composition of the consortium is well-balanced in relation to the objectives of the project
- If appropriate describe the industrial/commercial involvement to ensure exploitation

Evaluation criteria

- Quality of the consortium as a whole (including complementarity & balance)

3.4 Consortium as a whole

- Show the partners as a whole fully address the skills needed in the project
 - Skills, facilities, equipment etc (show against work plan)
- Demonstrate that there is no unnecessary overlap in roles
- Show how the location of partners fits the project scope and desired impact
 - Refer to project 'logic train' – problems, owners, needs etc
- Explain why they are motivated and committed (Particularly Industrial and SMEs)
 - Commercial activities, strategic match etc

3.4 Consortium as a whole

- Show how the partners are structured
 - **Research supply chains** to address the required project skills
 - **Application sectors** for any new technology developed
 - **Supply chain** for any new product/service
 - **Value chain** for the knowledge creation & dissemination

3.4 Consortium as a whole

Participants

- Minimum conditions
 - At least 3 legal entities
 - Established in a Member state or Associated country
 - In 3 different countries
 - Must be independent of each other
- Additional conditions
 - Detailed in each work programme (e.g. minimum number of participants, Industry etc...)
- Third countries
 - After the minimum conditions have been met
 - Once any additional conditions in the WP are fulfilled
 - Only if **CLEAR MUTUAL BENEFIT**
- Subcontracting
 - **BE CAREFUL!**

If in doubt
Keep it SIMPLE!

Do not Subcontract
Critical Research!

3.5 Resources to be committed

Guide for Applicants

- Describe how the totality of the necessary resources will be mobilised, including any resources that will complement the EC contribution. Show how the resources will be integrated in a coherent way, and show how the overall financial plan for the project is adequate.
- In addition to the costs indicated in Part A3 of the proposal, and the staff effort shown in section 3.1, indicate any other major costs (e.g. equipment).

Evaluation criteria

- Appropriateness and justification of the resources
 - budget, staff, equipment

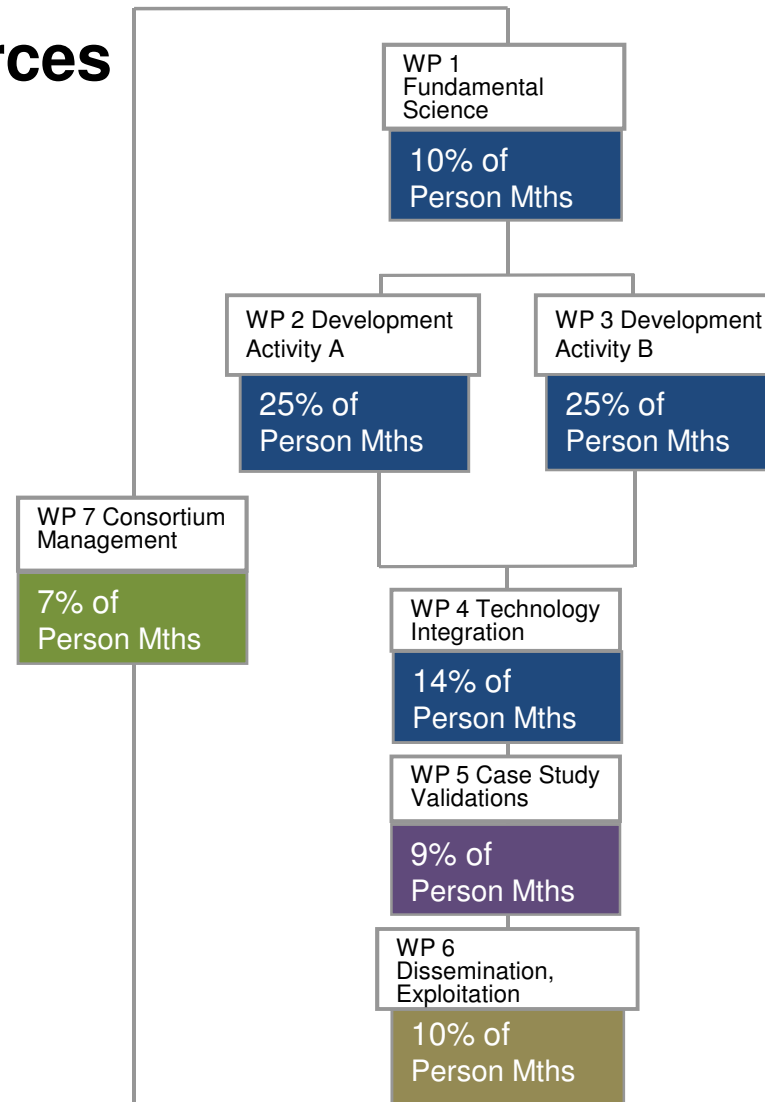
3.5 Resources to be committed

- What you need to do

- Present and Justify all the resources required
- Cost using a Bottom up approach – from the needs of the work programme
- Use additional tables – preferably develop Excel spreadsheet
- Show estimated workings for travel and subsistence
- Take care of consumables, equipment etc – Provide table listing equipment
- Answer the questions – WHY? and What For?

3.5 Resources to be committed

Human Resources



Show how resources are to be distributed throughout the project

3.5 Resources to be committed

Provide a table giving the major durable equipment

- Include computing and other facilities
- Indicate if it is to be provided or purchased by each partner (refer to the tasks)

Partner	Equipment
W	Scanning Electron Microscope (WP 3) , Bio-propagation cell (WP 3), Certified proteomics lab (WP 5) – Provided Specialist cell multiplication unit (WP 3) – To be Purchased
X	Psychology lab (WP 4), sleep deprivation unit (WP 4) – Provided
Y	Specialist data on population sleep trends in Austria, Benelux (WP 2), Linux hard drive system (WP2) – Provided Access to data on population sleep trends in Norway, Sweden (WP 2) – To be Purchased
Z	Certified drug testing laboratory (WP 6) - Provided

3.5 Resources to be committed

Create an in-depth cost analysis

- Use a detailed “**bottom up**” approach to develop the resources and costs of each partner per Work Package - (Preferably per Task)
 - Time for meetings
 - Time for trials
 - Time for research activities
 - Travel costs (number and cost of flights)
 - Expenses
 - Consumables
 - keep below 10%
 - allocated to selected partners only

An Excel spreadsheet will be invaluable!

Explain any assumptions

Resources – Also Consider

- **Collective project resources**
 - People
 - Equipment & Consumables
 - Facilities
 - Time & money (budget is sufficient + value for money!)
- Cross-reference to other parts of the proposal
- Partners bring significant **complementary resources** by giving access to their equipment & facilities

Resources – Link to the WP

- **Value for money for the EC!**
- **Quantify** volume of work (ref. section 1.3)
 - Experiments to be carried out
 - Variables to be tested
 - Samples, test pieces or prototype components to be made
 - Data to be gathered
 - Companies to be sampled or involved in validation
- **Justify** why you have included each task
 - How it facilitates other tasks
 - How it facilitates or compensates in other WPs
 - How it facilitates the WP deliverable

Summary of Staff Effort

Partic. no.	Partic. short name	WP1	WP2	WP3	...	Total person months
1						
2						
3						
etc						
Total						

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Section 3.1

Work plan

1.3 S/T methodology and associated work plan

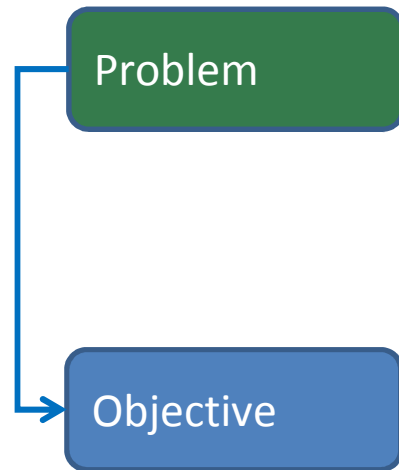
- **Guide for applicants:**
 - A detailed work plan should be presented, broken down into work packages. A work package is a major sub-division of the proposed project with a verifiable end-point, normally a deliverable or a milestone in the overall project
 - Work packages should follow the logical phases of the implementation of the project, and include consortium management and assessment of progress and results
- **It is essential to show that you have a coherent plan to achieve the project objectives and handle any unexpected events (risks)**

3.1 Work plan

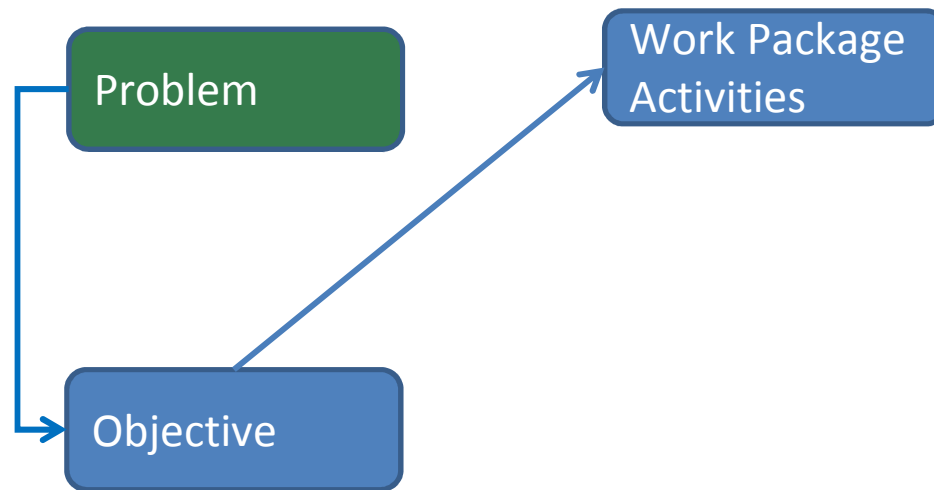
- Number of WPs must be **appropriate**
 - to the complexity of the work
 - the overall value of the proposed project
- Planning should be **sufficiently detailed** to
 - justify the proposed effort
 - allow progress monitoring by the EC

Structure of the Work Programme

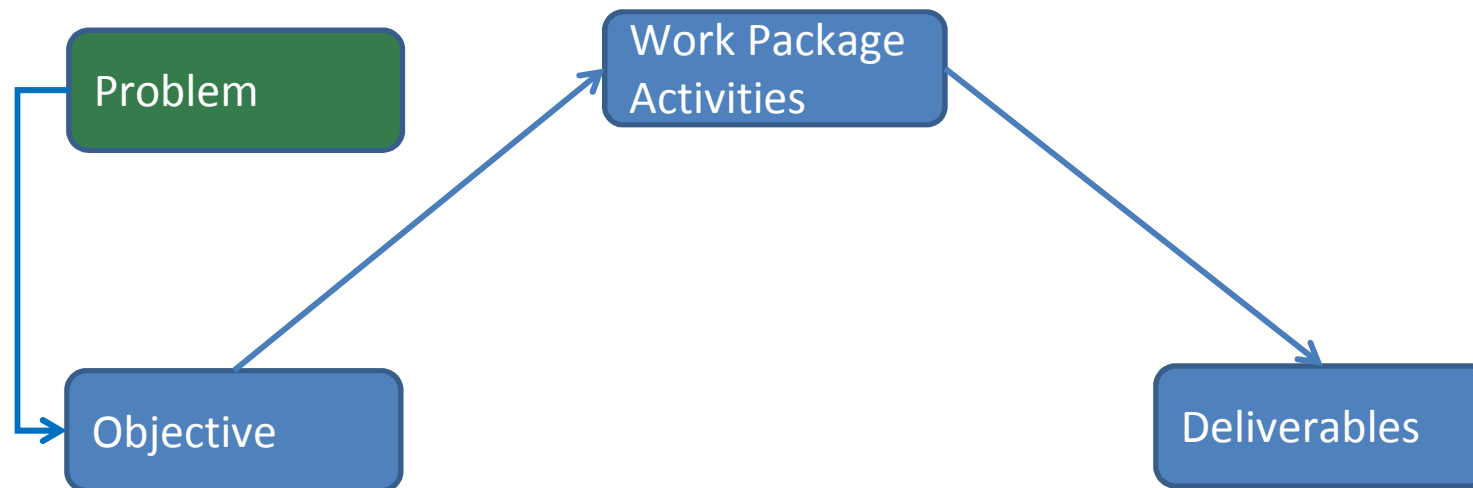
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Structure of the Work Programme

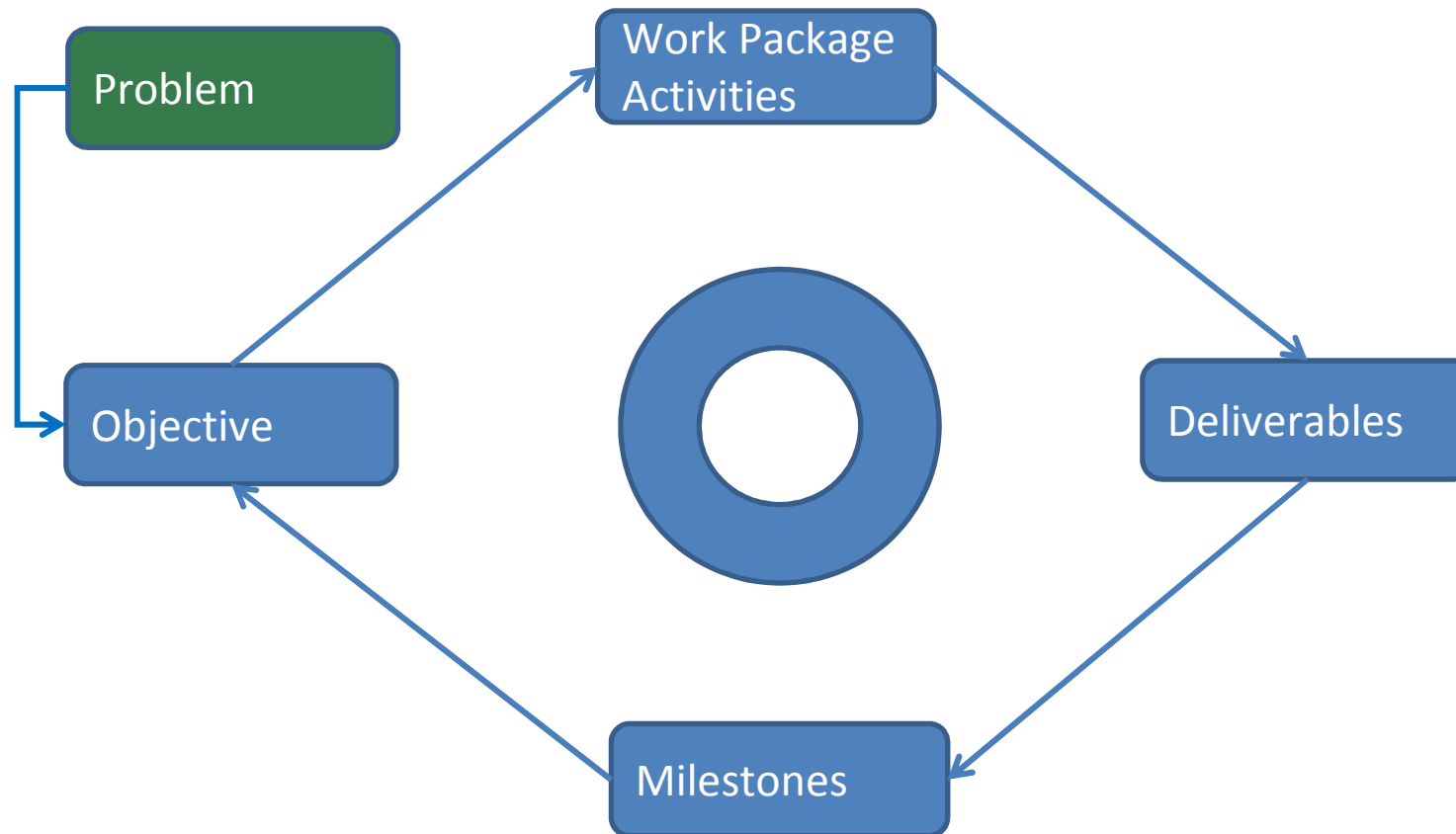


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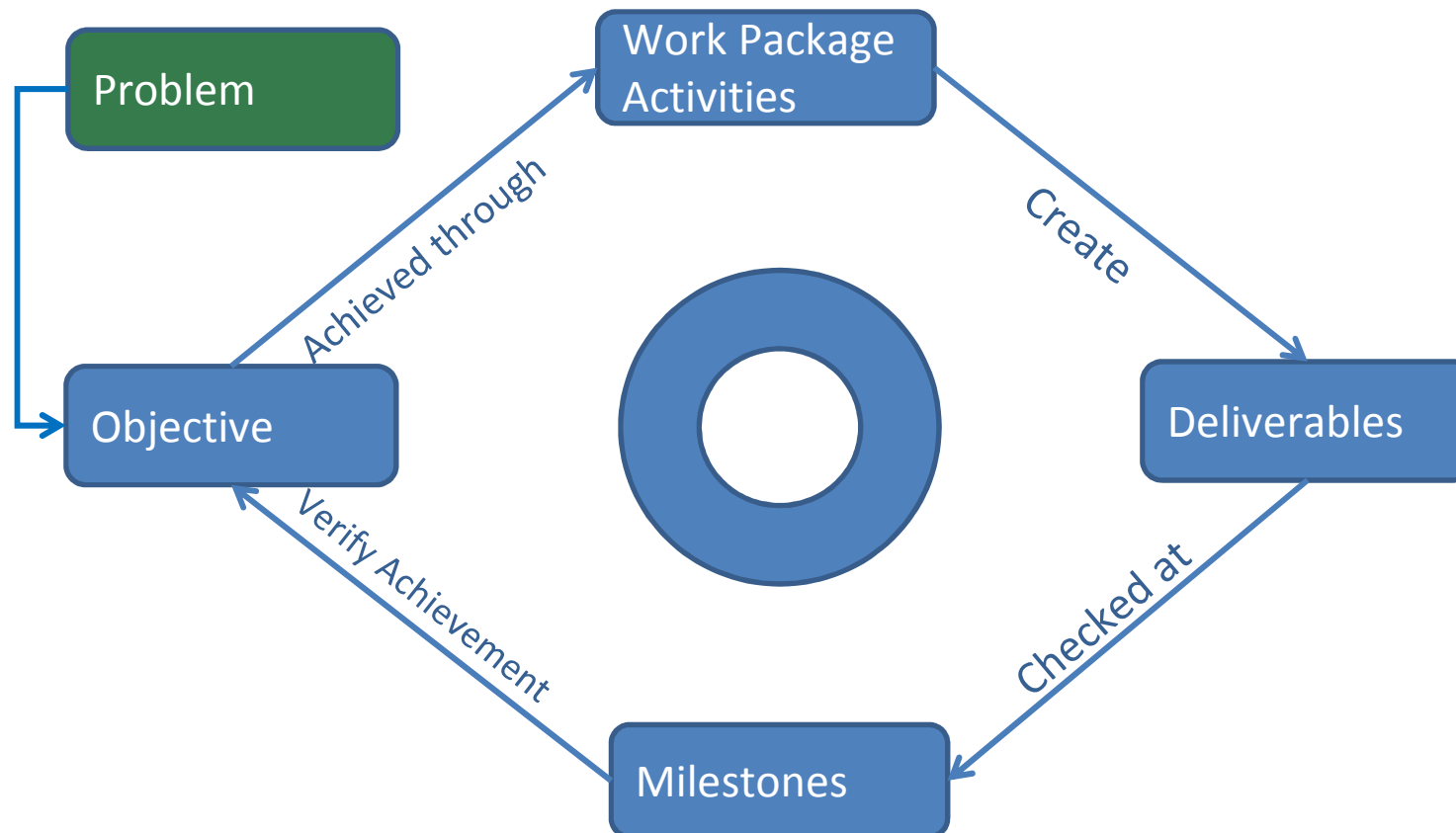


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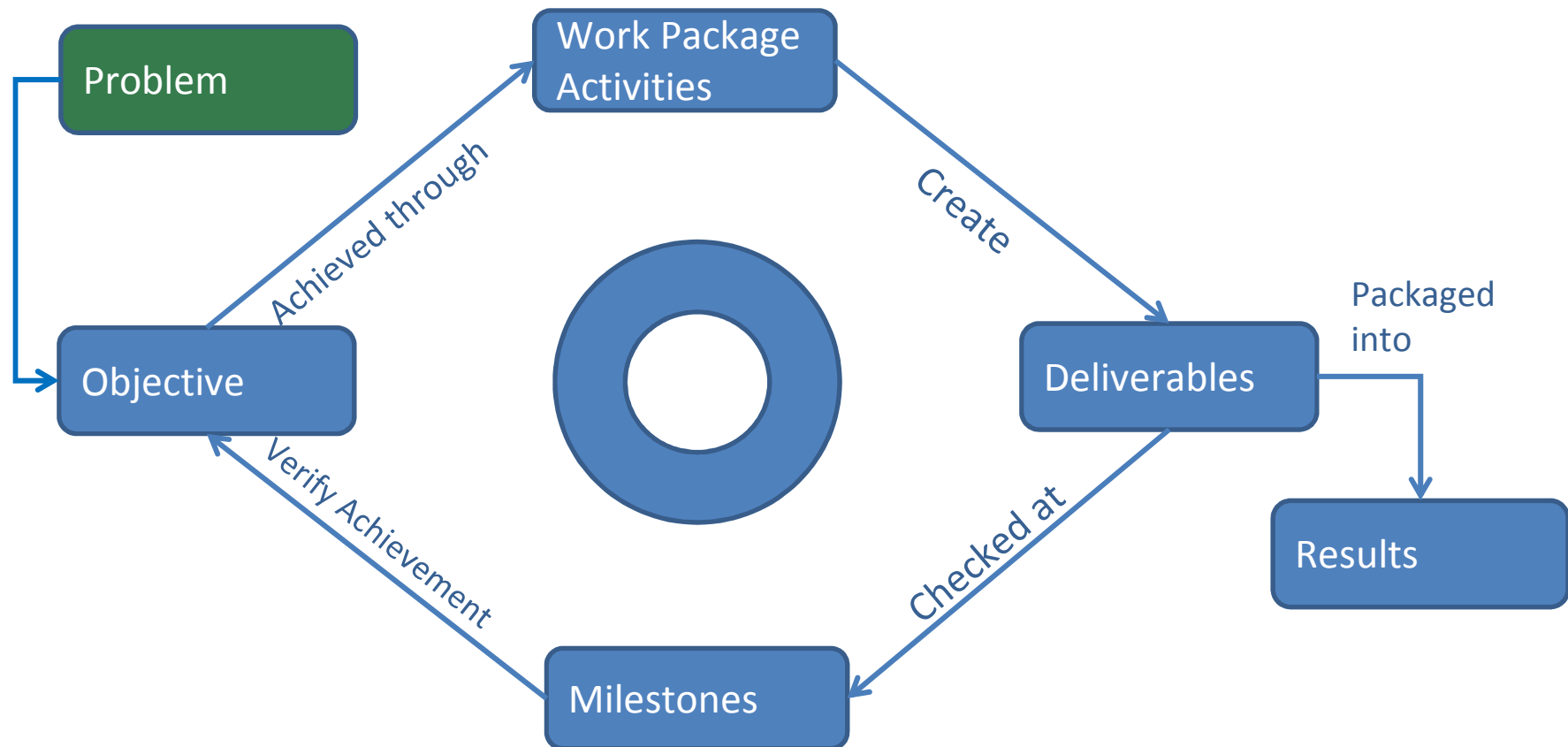
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Structure of the Work Programme



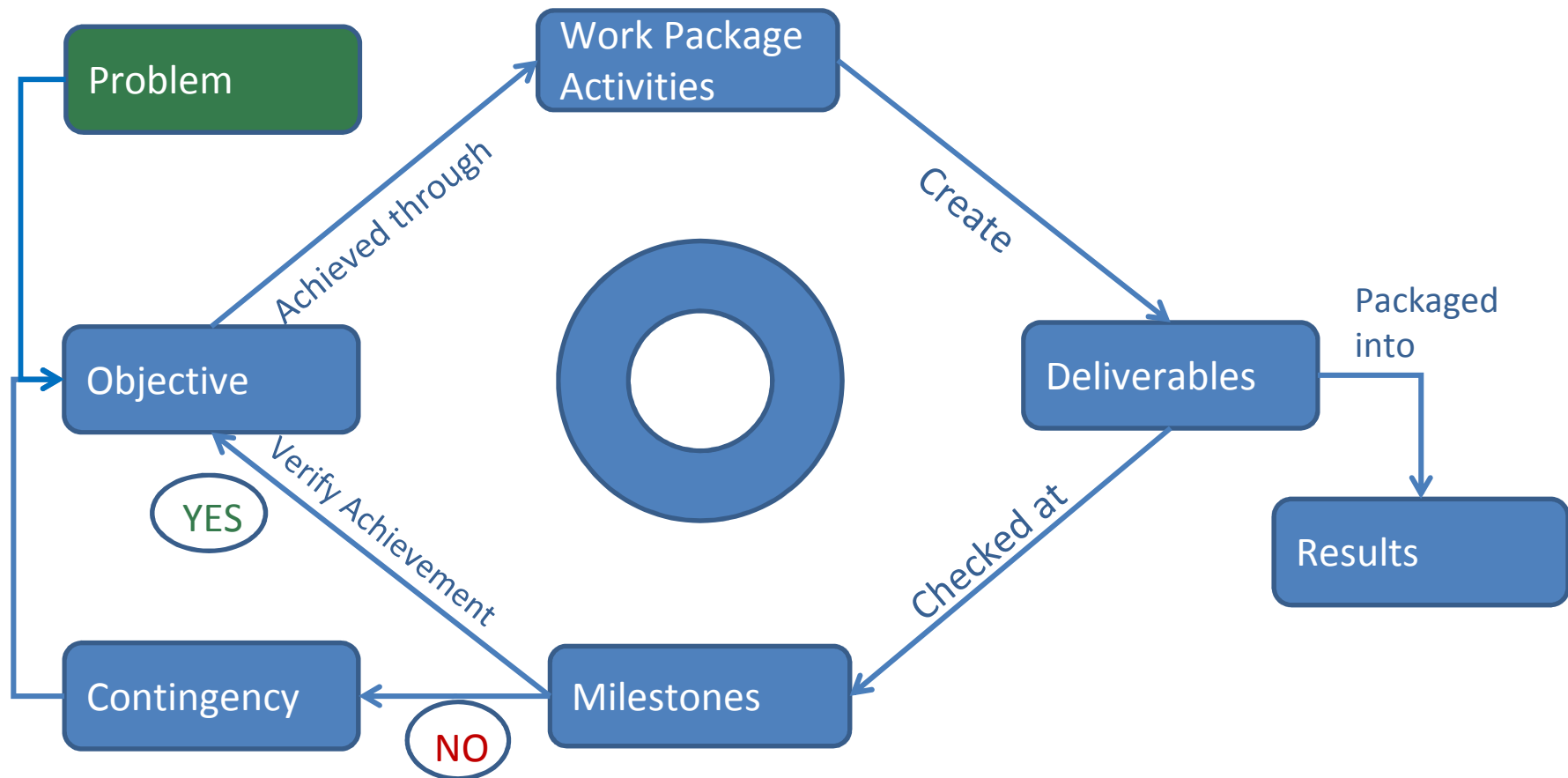
Structure of the Work Programme



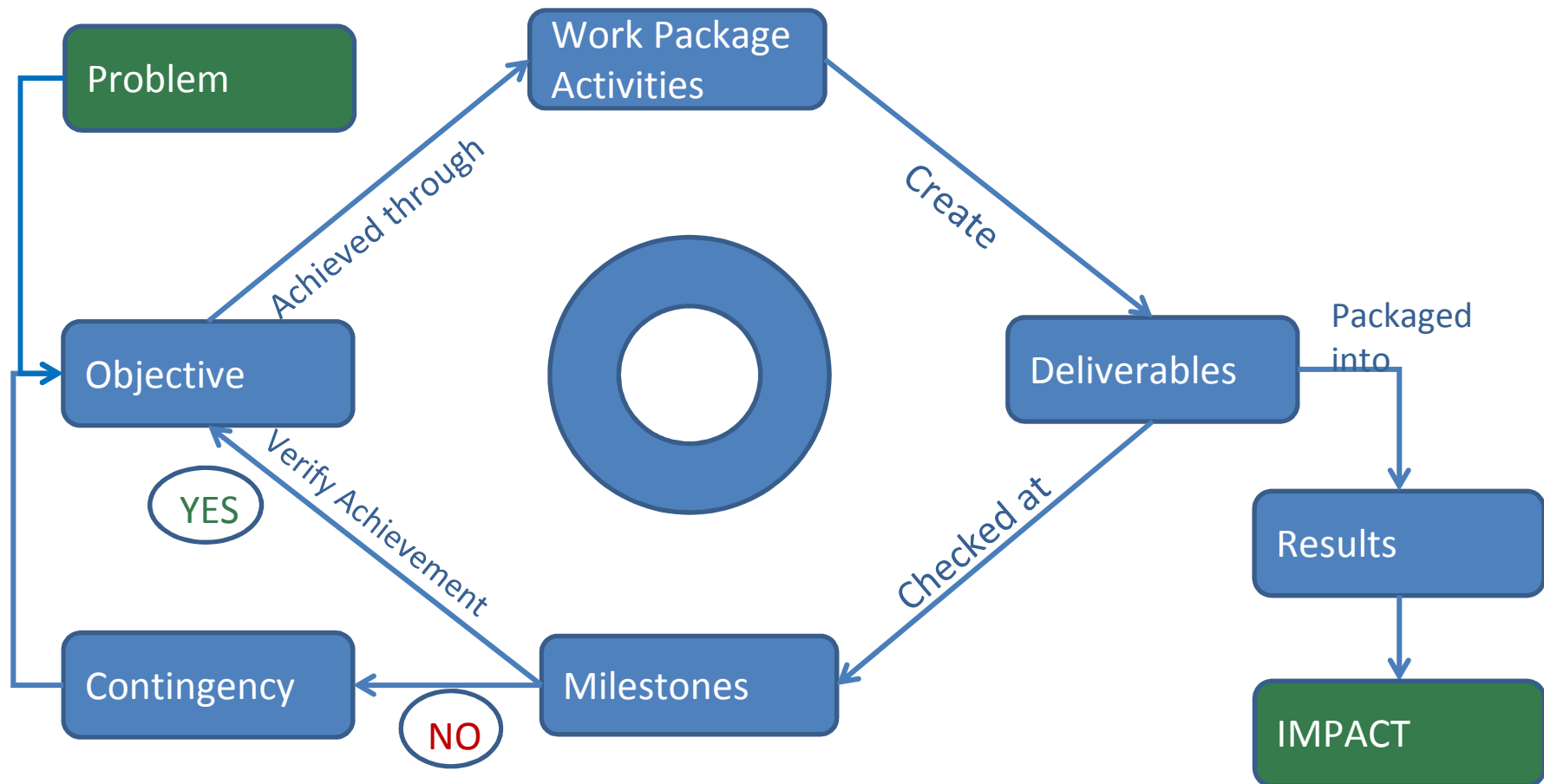
Link Risks Identified to Section 3.2!

- **Risk is the chance that an event will occur that will prevent you achieving the stated project objectives**
- **For each of the tasks and project innovations consider:**
 - What could go wrong (Identify)
 - What are the chances that this could happen (Likelihood)
 - What impact would this have for the project (Impact)
 - What mitigation or contingency actions could be taken to Prevent the risk from happen or Reducing its impact (Action)
 - How will implementing the action affect the overall results (Impact of Action)

Structure of the Work Programme



Structure of the Work Programme

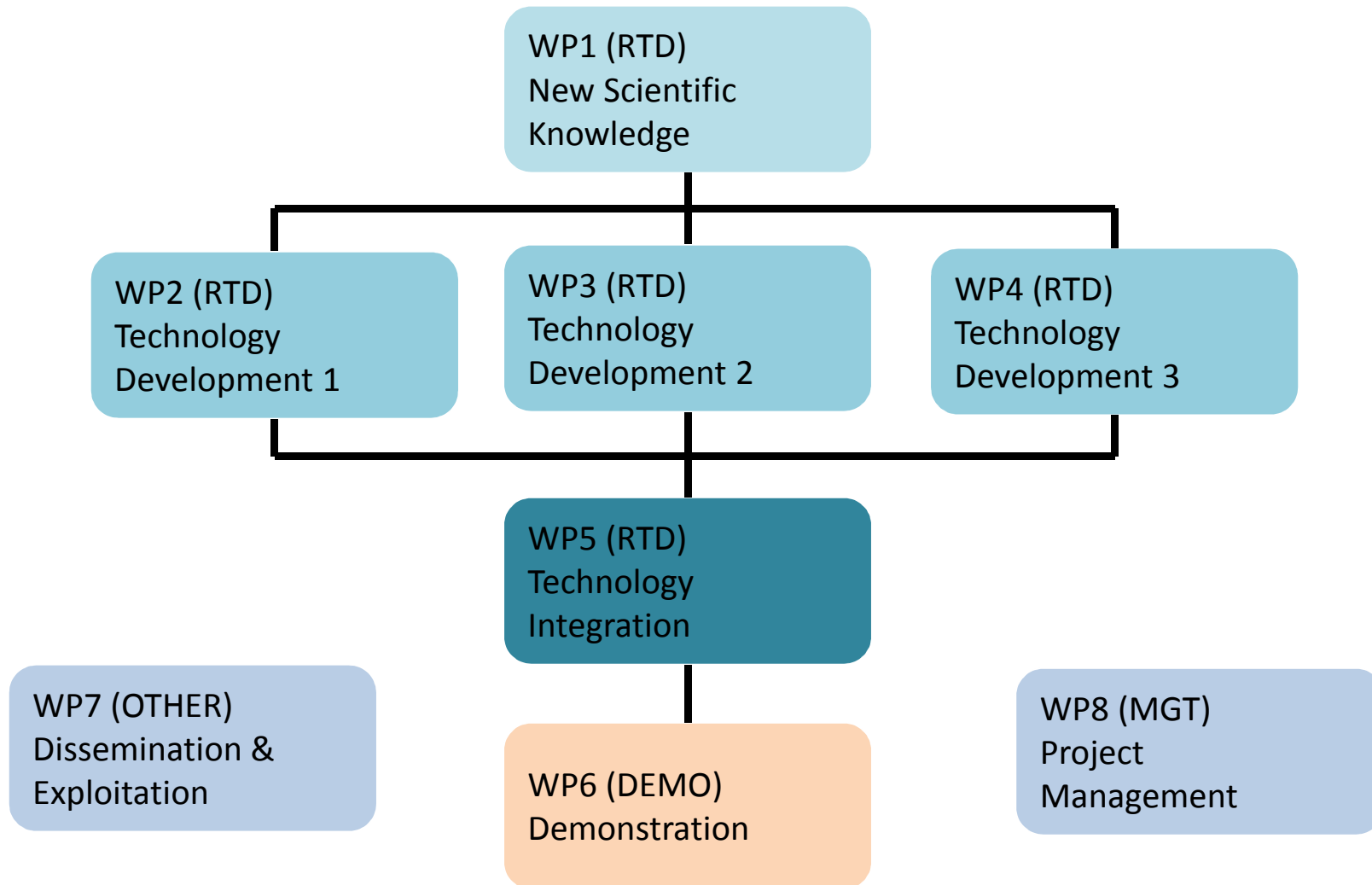


Types of Activity

Activity Type	Funding Rate	Eligible Activities
RTD	75% - SMEs, Uni's 50% - Other	Research Technological development Technical Coordination
Demonstration	50% - All	Validation testing of technology and prototypes Commercial demonstration
OTHER (typically <10% of funding)	100% - All	Exploitation planning Dissemination Intellectual Property Training
Management (typically <7% of funding)	100% - All	Consortium management Financial Administration Legal

Example – Work Programme Structure TurkeyⁱⁿFP7

Cooperation | Research | Technology



Structure of Section 3.1

- **Description of the Work Programme Strategy**
- **Work programme Chart and Tables**
 - Work Programme Flow Diagram
 - Project Gantt Chart
 - Work Package List
 - Deliverables List
 - Work Package Descriptions
 - Summary of Staff Effort – (Now in section 3.5)
 - List of Milestones
- **Use the tables provided in the ‘Guide for Applicants’**

Description of the work programme strategy

- **Describe the overall structure and strategy of the work plan:**
 - What are the main activities and what is the purpose of including them?
 - Describe the key project risks within each work package, how these risks have been mitigated and the contingency plans
- **Explain which partners are leading each WP activity, ensuring a specific and unique role for each partner**
- **It is important not just to list the work pack objectives and activities, but rather explain the reasoning behind your approach and how it will enable you to achieve your objectives**

Example text

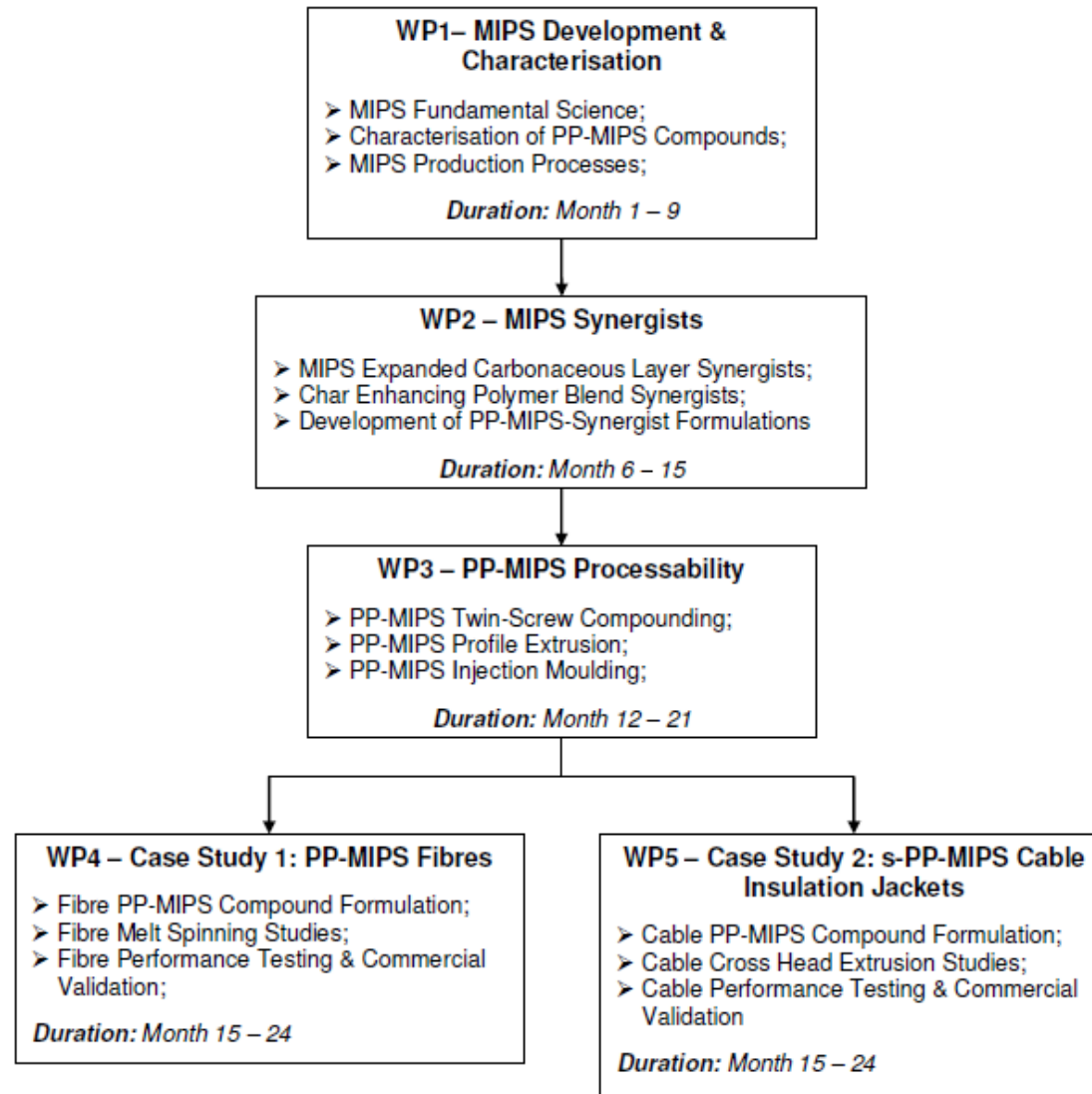


- Pre-clinical trials will be performed to analyse the biocompatibility of the copolymer coated components:
 - Determine the material and sample biocompatibility and toxicity by applying biochemical test
 - Study of the biological effect of mechanically produced particle fragments on T-cell and other cellular components of the immune system

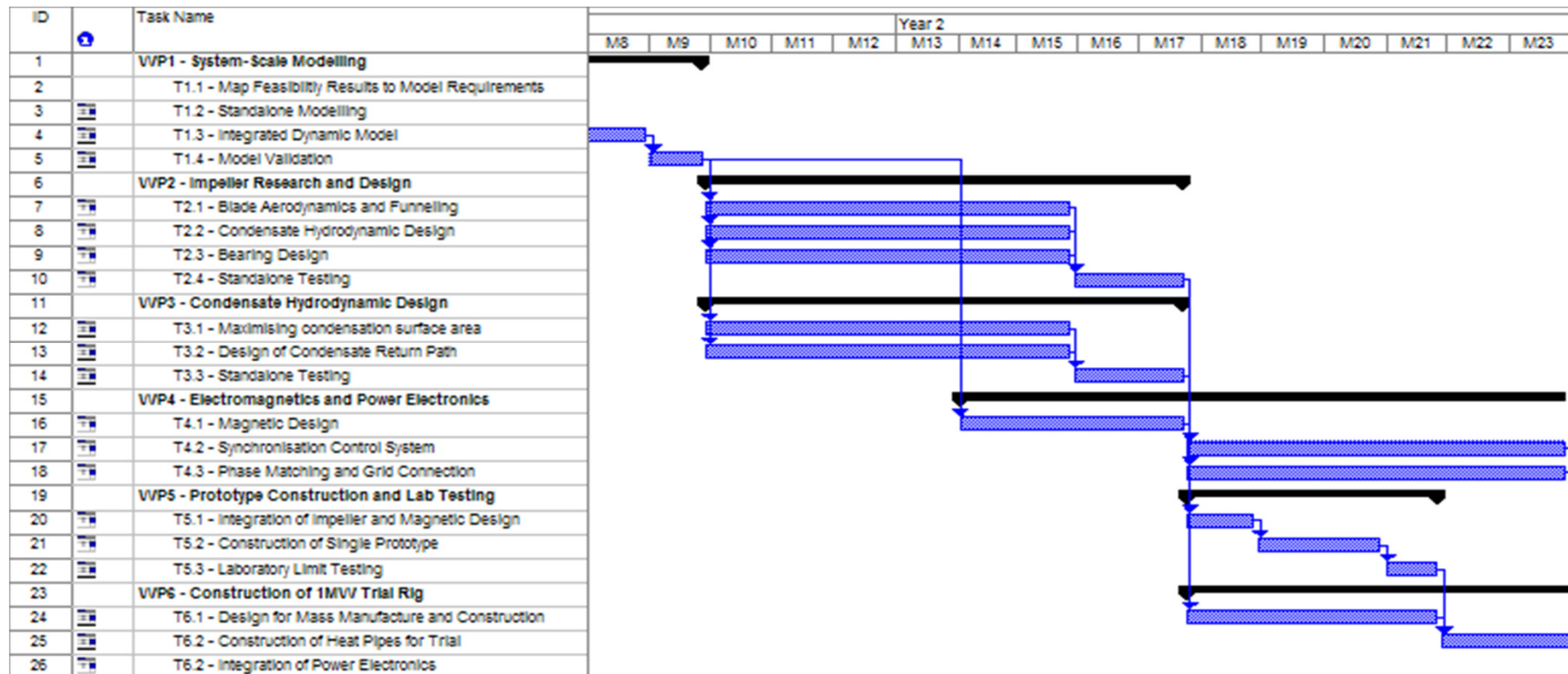


- Before we can take our developments forward to clinical trials and approvals, we must first perform a number of laboratory tests. In particular, we will need to assess the biocompatibility of the copolymer coated components. We will do this by applying biochemical assays to at least 50 clinical samples and studying the biological effect of mechanically produced particle fragments on T-cell and other cellular components of the immune system. This work will be undertaken by Partner X.

Work Programme Flow Diagram



Project Gantt Chart



- Show the work package and task interdependencies and timings in the form of a Gantt Chart (using a professional PM software package if possible)
- Remember to show the 'Milestones'

Work package No	Work package title	Type of activity	Lead partic. No	Lead partic. Short Name	Person months	Start month	End month
	TOTAL						

Work Package Tables (1)

Workpackage number		Start date or starting event:	
Work package title			
Activity type			
Participant number			
Person-months per participant:			

Objectives

Description of the work *(possibly broken down into tasks), and role of participants*

Deliverables *(Brief Description and month of delivery)*

Work Package Tables (2)

- **When writing work packages:**
 - Ensure SMART objectives that closely match those defined in Section 1.1
 - Create 3 or 4 tasks per work package
 - Quantification – justify the size of the grant by quantifying the volume of work (e.g. number of materials, tests, samples etc...)
 - Don't say 'we' say 'who' – be specific about who is doing what in each work package and task
 - Avoid overlap – if multiple partners are engaged in the same task, ensure that their roles are defined and clearly different
 - Level of detail – 1 or 2 lines is not sufficient. Clearly define exactly what work will be undertaken and by who (~2 pages per WP)
 - A work package usual has ~3 deliverables that represent the key outputs of the project

List of Deliverables

Deliverable No	Deliverable Name	WP No	Nature	Dissemination level	Delivery Date

- The **Nature** indicates the ‘thing’ that will be delivered:
 - **R** = Report, **P** = Prototype, **D** = Demonstrator, **O** = Other
- The **Dissemination Level** will use one of the following codes:
 - **PU** = Public
 - **PP** = Restricted to other programme participants
 - **RE** = Restricted to a group specified by the consortium
 - **CO** = Confidential, only for members of the consortium

List of Milestones

No	Milestone Description	Related WP's	Expected Date	Means of Verification
M1	<i>Advancement of MIPS chemistry achieving at least one optimised chemistry (form) achieving efficient carbonisation and intumescence, thermal and light stability, controlled rheological properties and low moisture absorption within PP materials</i>	WP1	Month 6	➤ MIPS additive achieving: thermal stability $>240^{\circ}\text{C}$, efficient carbonisation & intumescence $<320^{\circ}\text{C}$, melting point $<160^{\circ}\text{C}$ and moisture absorption $<0.1\%$;
M2	<i>Optimisation of the MIPS pilot scale production processes achieving consistent MIPS quality and form</i>	WP1	Month 9	➤ Availability of MIPS in kg quantities and of consistent chemistry and form
M3	<i>Mid Term review and demonstration of PP-MIPS synergists mechanism of action and attainment of target fire protection properties</i>	WP2	Month 12	➤ Expanded carbonaceous layer formation $<300^{\circ}\text{C}$, thermal stability $>550^{\circ}\text{C}$ & max RHR $<140 \text{ kW.m}^{-2}$; ➤ PP loading level $<15\%$;

- List the key milestones – points in the project at which a progress check has to be made
- Provide a quantifiable means for verification of the milestone

Practical Exercise – 30 minutes

Build your house!

- Specifications (Overall Objective)
 - Construct a house with 4 bedrooms and 5 bathrooms within a budget of €1 million, within 12 months having a final market value of at least €1.5 million
- Tasks
 - 1/ Identify SMART objectives
 - 2/ Present a list of interim deliverables
 - 3/ Identify a number of clear milestones

SMART Objectives

Specific
Measurable
Achievable
Relevant
Timed

Agenda

09:00 – 10:00	Impact
10:00 – 10:30	Implementation (1)
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17:00 – 17:30	Preparing for Horizon 2020

Section 4 – Ethics issues

Guide for applicants

- Ethical issues - **explain the benefit & burden of the experiments** & the effects it may have on the research subject.
- Identify the **countries** where research will be undertaken and which **ethical committees** and regulatory organisations will need to be approached during the life of the project.
- Table to fill in the guide

Details in Annex of the Guide for Applicants

(and http://cordis.europa.eu/fp7/ethics_en.html)

Ethics issues

- **Rules for Participation, Article 10** «*A proposal [...] which contravenes fundamental ethical principles [...] shall not be selected . Such a proposal may be excluded from the evaluation & selection procedures at any time.*
- Consult the “Commission’s ethical rules” for FP7 projects

Ethics issues

- Assess whether the topic & scope requires **consultation**
 - Relevant national ethics committees
 - Sought & received approval prior to submission
- **Complete the table** & include it within the proposal
- Might need the EC to set up an **Ethical Review Panel**
 - **Automatic** when research intervention on humans, the use of hESC and/or foetal issues, and non-human primates
 - Or evaluators decide

Ethics Help Desk for FP7 projects

TurkeyinFP7
Cooperation | Research | Technology

- Provides information & offers consultation on FP7 **funded** research
- Help to meet the EU & international ethical standards
 - As per issues outlined in the "**Ethics check list**"
- **Contact:** Isidoros Karatzas, Head of the Ethics Review Sector - Unit for Governance and Ethics
 - Isidoros.karatzas@ec.europa.eu

Ethics check list

	YES	Page
Informed consent		
Research on Human embryo/foetus		
Privacy		
Research on Animals		
Research involving Developing countries		
Dual use		
ICT Implants (ICT only)		
I confirm that none of the above issues apply to my proposal		

Ethics Issues

- Involve one or more ethicists in the Project Board
- Create a separate Ethical Issues Board
- Include a WP to analyse the ethical issues
 - Include an ethical impact assessment of the project as a deliverable
- In your project periodic reports
 - Include a section describing the handling of the ethical aspects

Consideration of Gender Aspects

- Optional
- Actions to promote gender equality in your project, or in your field of research
 - Improving the gender balance in the project consortium
 - Measures to help reconcile work and private life
 - Awareness raising within the consortium
 - Events organised in schools or universities
 - Don't do positive **discrimination**!
- Will **not** be evaluated
 - But discussed during negotiations if proposal is successful
- Maximum length is 1 page

Other considerations

If you feel there are gender aspects or ethical issues relevant to your proposal you should have a member of your consortium who understands the legislation landscape and can support you.

If this is not the case then you need to go back and be critical on how you built your consortium

Agenda

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Writing Skills - Style

Golden Rules - Presentation

- REMEMBER
 - Your evaluators may not speak English or read it very well
 - Your evaluators may not all be in your specific field – particularly on joint submissions – eg: NMP-ENV-ENERGY-ICT
- Write clear simple English
- Space the text out so it is easy to read
- Use paragraphs properly
- Do not repeat the same text throughout the document
- Do not go mad with bold and underlining
- If someone else thinks it is confusing or unclear – IT IS!!!

Golden Rules – Clear English -1

- Aim for an average sentence length of 15-20 words
- Vary between long and short sentences to help the flow and make your points punchy
- Assign one idea per sentence, and add another point if it is closely related
- Use paragraphs and avoid large blocks of text
- Write in the active voice to keep your sentences lively (use doing words)
- Remember that you're writing for the evaluator, rather than yourself. Whilst a thesaurus might be useful for sprucing up research papers, clear writing should not include words simply to sound impressive
- Do not use long words when a short one will do
- Do not over use technical jargon and abbreviations, unless they are terms **ALL** your potential evaluators will be familiar with

Golden Rules – Clear English -2

- Use positive, inspiring language that motivates readers. Say how your ideas 'will' solve the ECs problem and how you 'can' save them lots of money
- Avoid negative words, such as 'can't', 'don't' and 'won't'
- Avoid uncertain words, such as 'could', 'should', 'may', 'possibly', particularly when describing the work programme activities and impacts
- Start sentences using connectors to split long ones in two, such as 'but', 'so' and 'because'
- Wield an axe and chop out unnecessary words. Brevity is the basis of clear writing
- Use subheadings, bullet points and summaries to aid evaluators find specific information
- When you have finished, read it out loud. Does it sound natural? If not, refer to the above points again

Writing Skills - Style

Golden Rules - Layout

- Stick to the specified font sizes and margins
- Times New Roman is a good one – 11pt minimum
- Stick to the specified page lengths
- Use **simple** diagrams to help clarify your text
- Use tables to present figures/data more clearly
- Use the section headings provided in the GFA
- Do not mix the content and put under the wrong headings
- Make headings and sub headings clear – numbering/bullet points
- Make sure each section is consistently the same layout

Writing Skills - Style

Golden Rules - Content

- Get to the point you are trying to make quickly
- Do not waffle or go off the point
- Make sure there is a real point to everything you write
- Back up every key statement with references or data
- Avoid making a long list of pointless statements
- Use summaries to reinforce key aspects
- Check for consistency between sections
- Check for coherence throughout the proposal

Writing Skills - Style

Golden Rules - Abstract

- The first thing most evaluators will read
- Cover all key aspects
 - Need and Concept
 - Innovative Content and Methodology
 - Key Partners and Reason for them
 - Main Outputs and Potential Impacts
- Develop it over the entire writing period – 5 or more rewrites
- **DO NOT RUSH IT OFF AT THE END**

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The Evaluation Process Terminologies

- IER - Individual Evaluation Report
 - Normally remotely
 - Produced independently
 - Should be no conflicts of interest
 - Between 3 to 5 evaluators involved
- CR - Consensus Report
 - Produced by the Rapporteur after the Consensus Meeting
 - Amalgamated and sanitised version of evaluators IERs and views in meeting
- Panel Report
 - Summary of the events and decisions taken in the panel ranking meeting
 - Proposals are ranked based on score
 - Proposals with the same score in the funding cut off zone are sorted
- ESR - Evaluation Summary Report
 - In principle the EU authorised version of the Consensus Report
 - Sent to the Coordinator to inform about the decision to invite to negotiation

Right to
Redress



Meet the Evaluator

INDIVIDUAL

- Member of the EU27
- Member of the EU Associated or Accession Countries
- Anywhere else felt appropriate
- Should have a research qualification (PhD)
- Active in Academia or Industrial Research

- **PANEL COMPOSITION**

- Gender Balance
- Balance of Old and 'New Evaluators'
- Country Balance
- Technical Expertise in 'appropriate' field
- Balance between academic and industrial



Evaluator Tasks

- **REMOTE WORK**

- Read Proposals Independently
- Generally Between 5 - 12
- Prepare Initial Few Individual Evaluation Reports
- Scoring Consistency Check
- Finalise all IERs
- Rapporteur to Prepare Consensus Reports

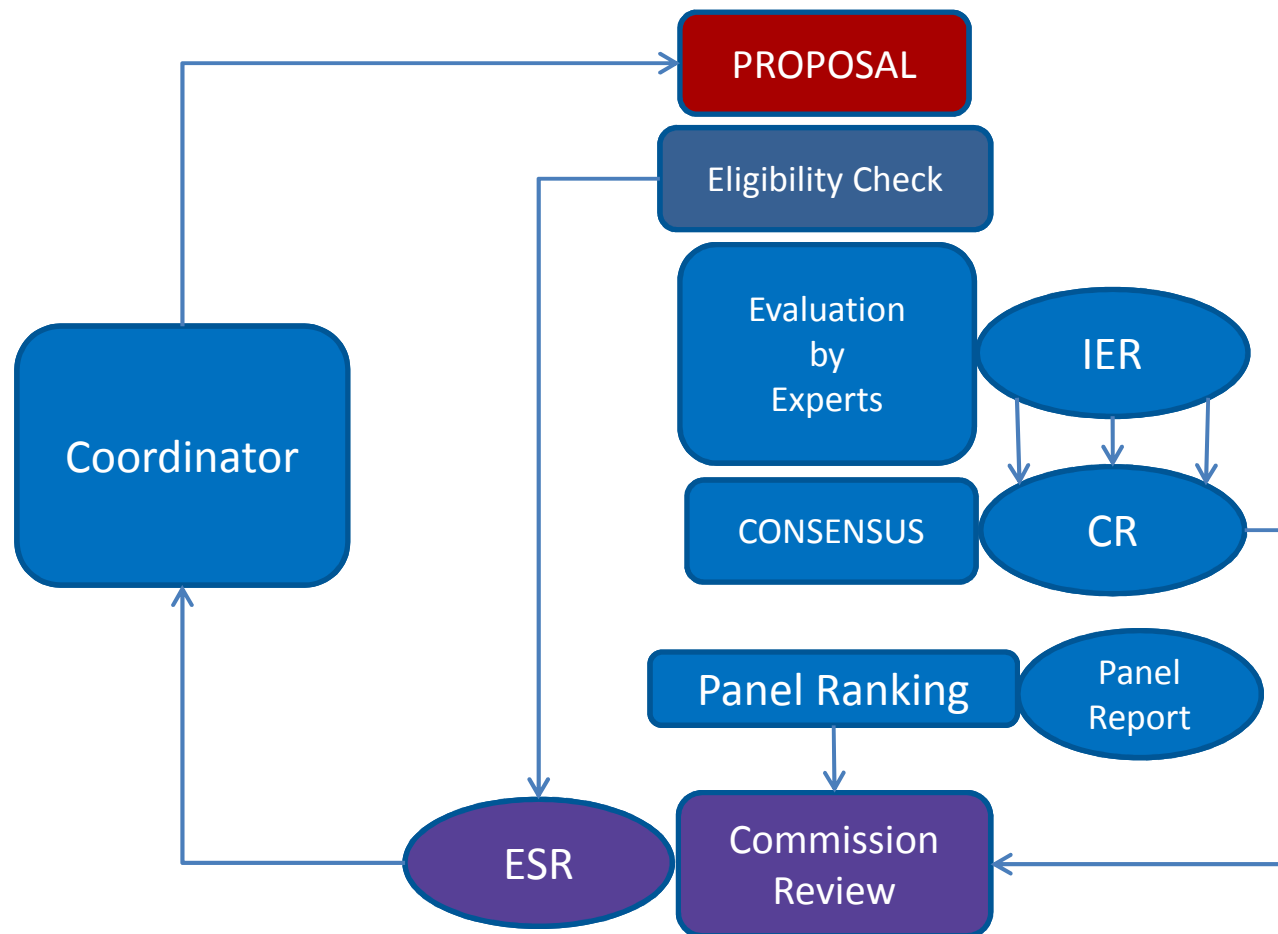
BRIEFING
PP Presentation
Work Programme

- **CENTRAL WORK**

- Consensus Meeting
- Rapporteur to finalise the Consensus Reports
- Quality Checking
- Panel Ranking Meetings

BRIEFING
Presentation
Q & As

The Evaluation Process



The Evaluation Process

The Typical Scoring System

0	The proposal fails to address the criterion under examination and cannot be judged due to missing or incomplete information.
1	Poor: the criterion is addressed in a cursory and unsatisfactory manner.
2	Fair: there are serious inherent weaknesses in relation to the criterion in question.
3	Good: while the proposal broadly addresses the criterion, there are significant weaknesses that would need correcting.
4	Very Good: the proposal addresses the criterion well, although certain improvements are possible.
5	Excellent: the proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

The Evaluation Process

Thresholds

- Thresholds are set for specific evaluation criterion
 - Depending on the funding scheme and call
 - Detail is given in the Work Programme or the Call Fiche
 - Typically these are
 - **3 or 4** for individual criteria
 - **10, 11 or 12** for overall threshold
- If the proposals fails to achieve any threshold for a criterion
 - Proposal will not be eligible for funding

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The Coordinator Role

Teamwork!

- The administration team includes:
 - Coordination
 - Project management
 - Partner management
 - Financial management
 - Administrative duties
 - Legal aspects

The Coordinator

What Skills Do You Need?

- Good Communication Skills (Stay in touch with your team, partners and the Commission)
- Sales Skills (“re-sell” the project to the partners)
- Technical Knowledge (To write and apply the DoW)
- Good Organisation Skills (Keep Your Paperwork in Order)
- Awareness of EC requirements (Keep order in the project and other participants)

The Coordination Role

Liaison with Commission

Work Programme
Mandate
Main Grant Agreement
Potential Problems
Consortium Agreement

Administration

Contractual Obligations
Filing System
Financial Issues
Cost Statements
Payment Procedure

Managing the Project

The Work Plan
Monitoring Progress
Communications
Reporting
Meetings
Conflicts

Liaison with the EC

- Intermediary between the partners and the EC
 - The main contact point with the Commission
 - GA negotiation and contractual agreements
 - GA amendment
 - Project extension
 - Project delays
 - Partnership changes
 - Reporting – progress and financial
 - Publications - dissemination

Relationship with the Commission

- What Project Officers like
 - Problem solving attitude
 - Paperwork exactly as required
 - Real success and exploitation of the results
 - Understanding and respecting their system
- What Project Officers dislike
 - Problems without solutions
 - Surprises
 - Being kept in the dark
 - Unjustified delays

Consider him/her as a colleague

Liaison with the Commission

- The Project Officer may appoint a PTA to assist them (NMP)
 - External assistance to enable detailed, prompt, pro-active, & scientifically competent follow-up by the Commission of NMP projects
 - The Project Officer is still in charge
 - The PTA advises the Project Officer on technical issues
 - Normally the PTA will attend most management meetings
 - You need to copy all invites and reports to the PTA

Treat them well as the Project Officer will take their advice

- Overall administrative management of the project
 - Day to day Commission procedures
 - Managing and maintaining records through good filing system
 - Responsible for the financial and administration coordination
 - Timely submission of reports and cost statements
 - Ensuring prompt payment of financial contributions

Managing the work

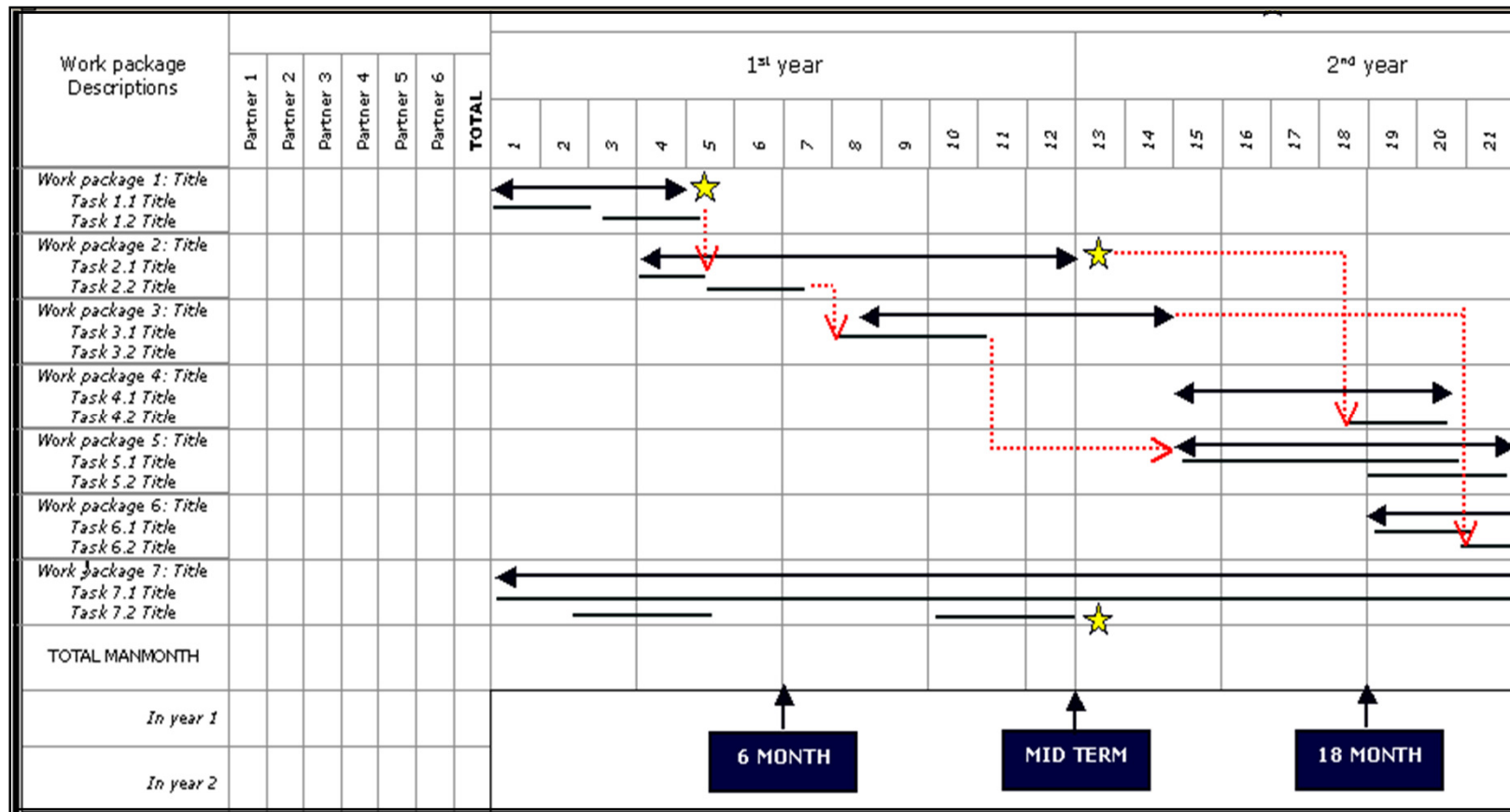
Responsible for the **scientific/technical** coordination

- Control and monitor technical progress during the project, ensuring that the project schedule is met
- Oversee all work to ensure task sequencing is maintained
- Review progress against budgets and critical path
- Collate all deliverables and milestone reports

Through support of nominated Work Package and Task Leaders

Work package bar chart

Status of project

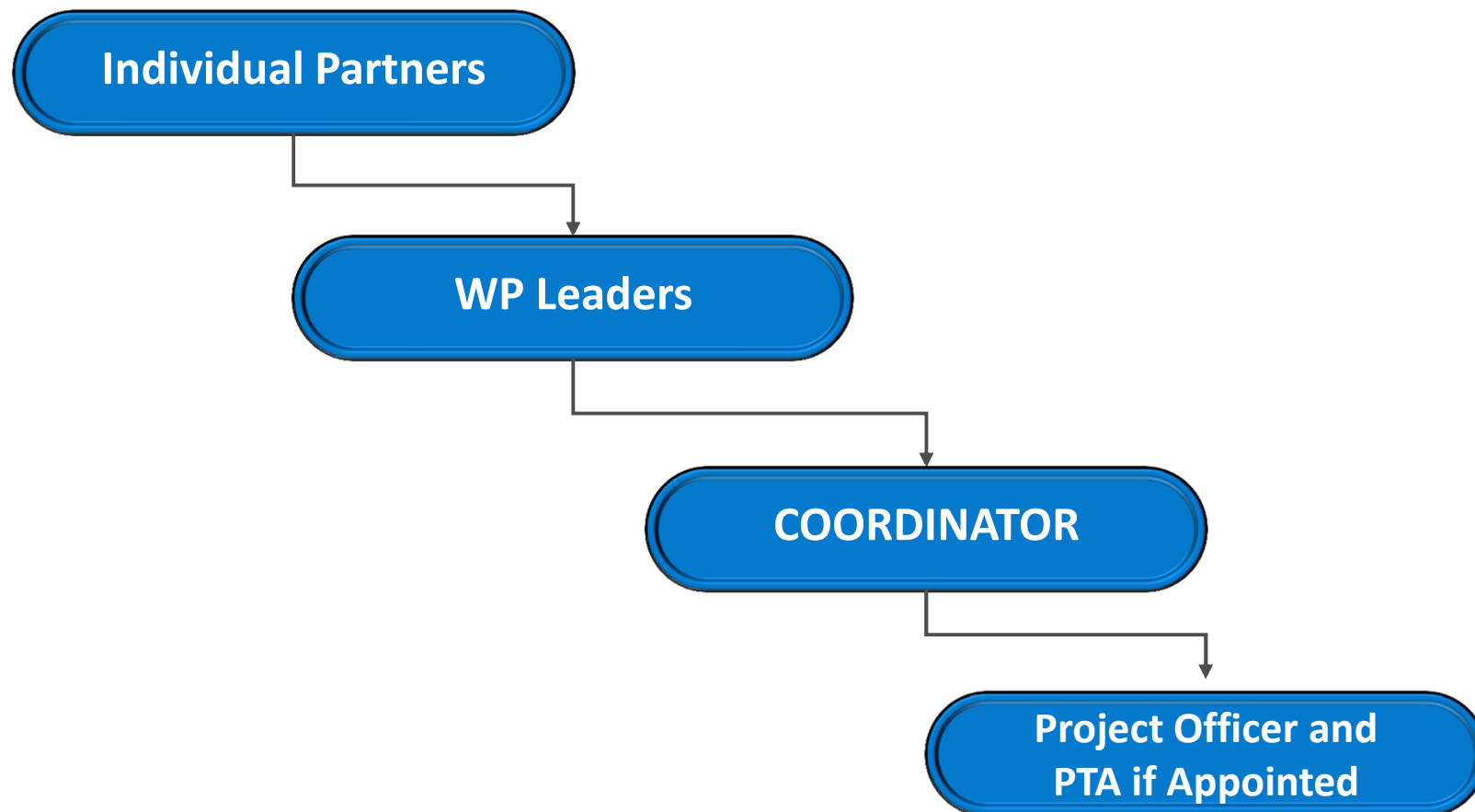


Project Meetings

- Responsible for the Organisation of Management, Technical and Exploitation meetings
- Provision of the minutes taken at these meetings

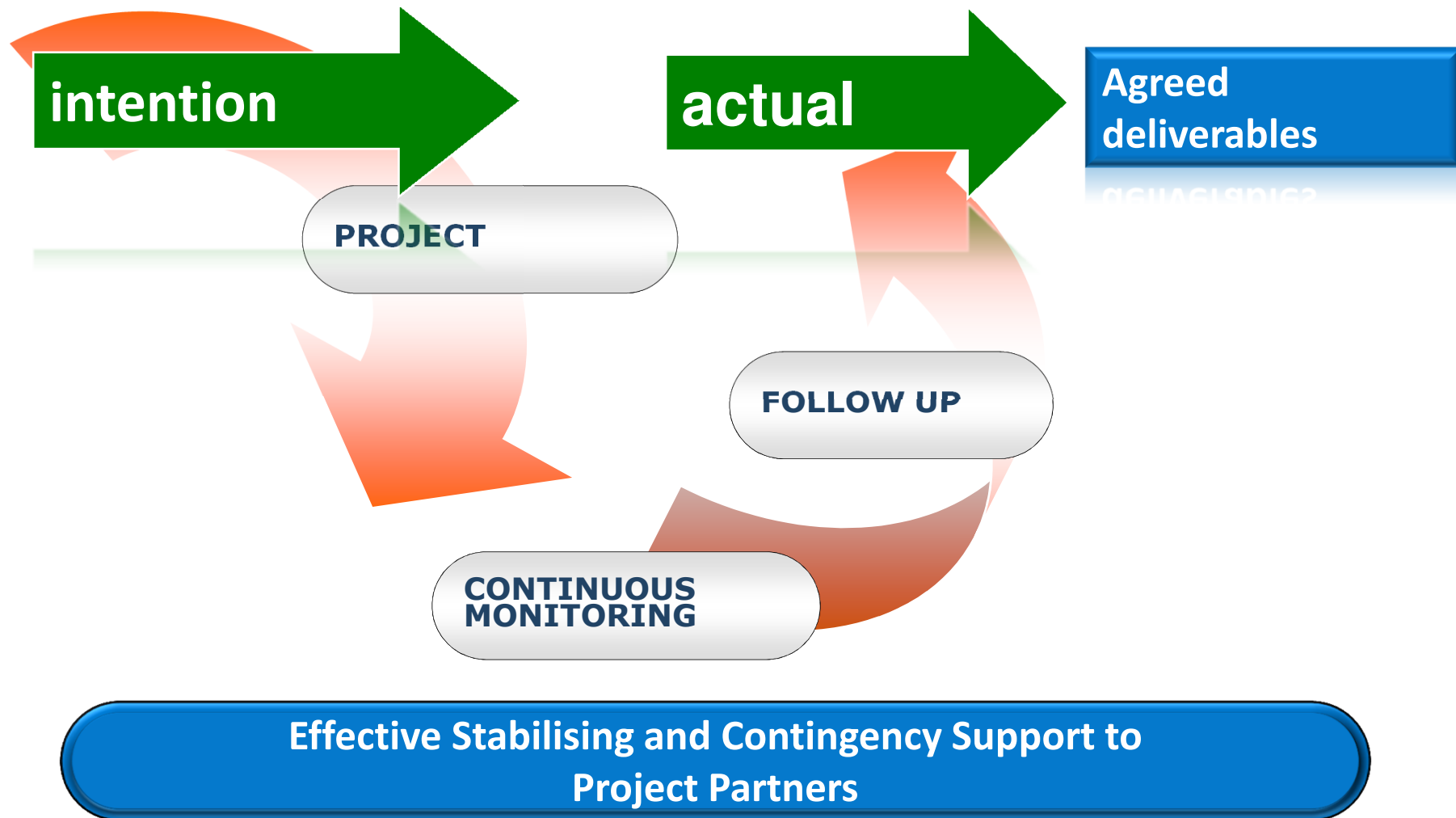
Ensure accuracy of the minutes
Ensure acceptance of all minutes taken

Collation and reporting Progress of work



Principal Role of Coordination Team

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Cooperation | Research | Technology



Agenda

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Consortium Agreement

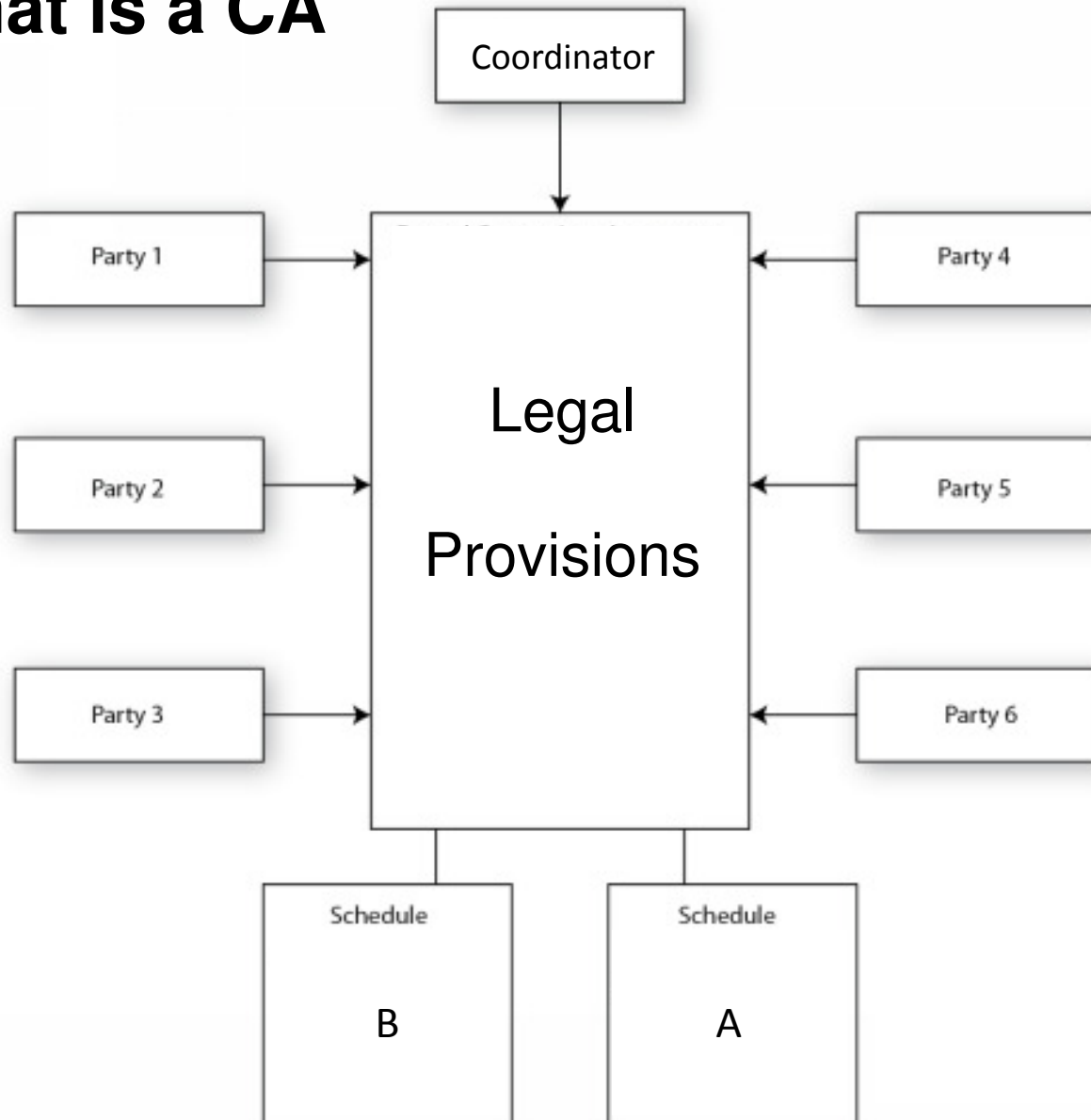
- A **private agreement** that the participants in a research or innovation-related project conclude amongst themselves
- It allows participants to implement and complement the provisions of the EU Grant Agreement
- It regulates internal issues related to
 - Work organisation
 - Intellectual property
 - Financial and other matters
 - It should not contradict the grant agreement signed with the EC

What is a CA

Consortium Agreement

- Legally binding agreement between several parties
- Typically comprises two parts:
 - Body of the agreement
 - Variety of Schedules or Annexes (supporting docs)

What is a CA



What is a CA

Consortium Agreement

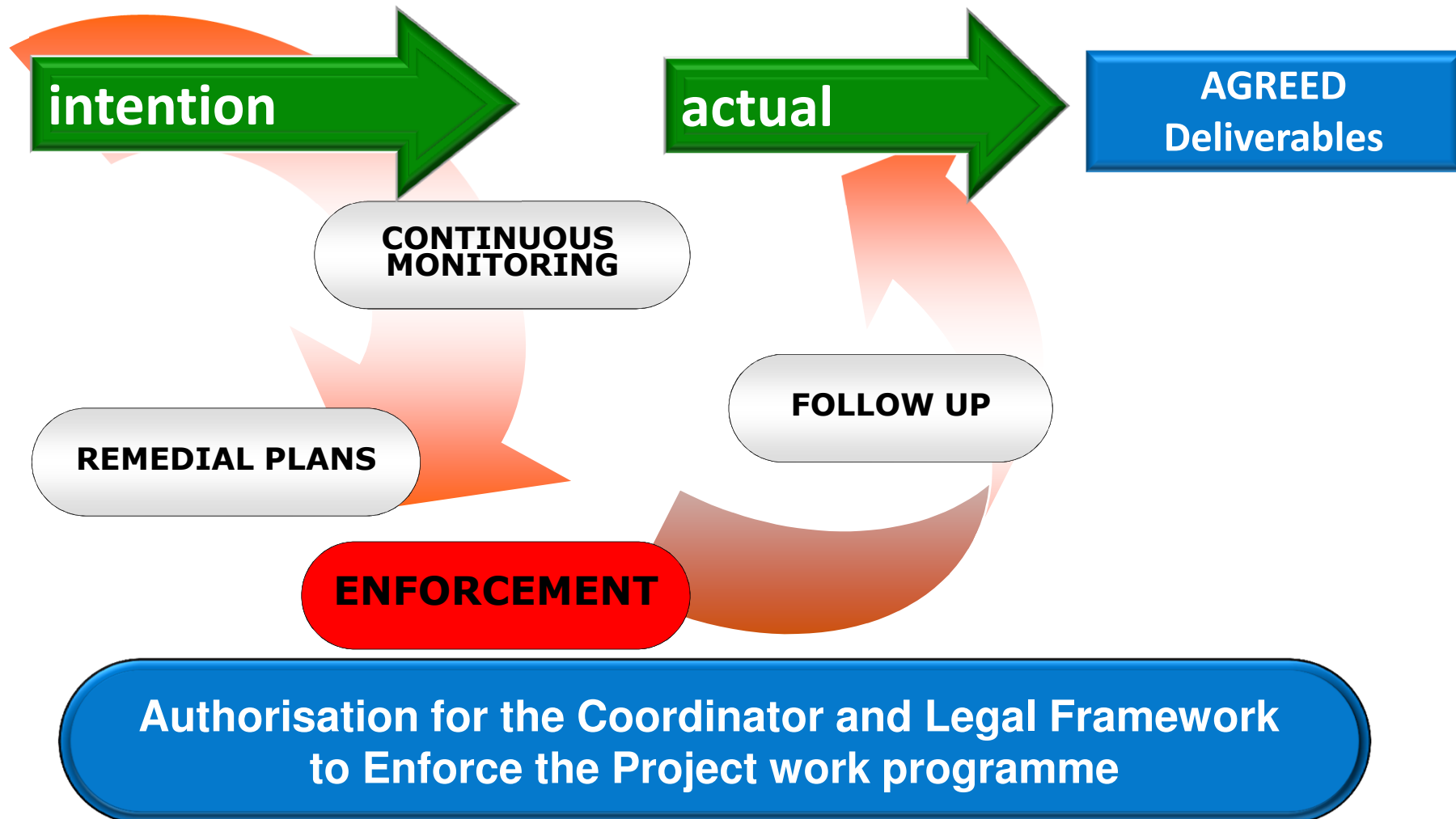
- Can also comprise of a general administration agreement and a series of bi-lateral contracts between the Coordinator and individual Parties.
- Can also comprise of a general administration agreement and a series of Memoranda of Understanding (MOU) or Letters of Agreement (LOA) between the Coordinator and individual Parties.
- Hybrids using all three.

Why do we need it

An effectively developed CA will

- Help ensure that producing project deliverables and achieving outcomes are made as efficiently as possible
- Provide a clear set of rules for managing the project
- And for regulating issues amongst the partners
- In many cases you will not get EU funding without one!

What the CA can do



Top Tip

- View the CA as a valuable management tool to aid efficient and effective management
- Do not consider it as just a piece of administrative paperwork
- Prepare well in advance so it can underpin the proposal preparation process

The Structure of a CA

- There are many different forms of CA but all contain the following typical aspects

PREAMBLE AND DEFINITIONS

- Identify all the participating parties and their official representatives
- Describe the context of the cooperation, its objectives and scope
- Define the purposes of the consortium agreement eg
 - to specify the relationship among the parties
 - the organisation of the work between the parties
 - the management of the project and
 - the rights and obligations of the parties
 - liability
 - intellectual property rights
 - dispute resolution
- Define the key legal and technical terminology in order to avoid misunderstandings
- List the annexes

PROJECT IMPLEMENTATION

- Describe the project in general terms and refer to a technical annexes for details including;
 - work packages
 - allocation of tasks
 - milestones
 - planning of the project
- Define the foreseen achievements in terms of deliverables
- Describe the technical responsibility and contribution of each party in the implementation of the project
- Indicate how much and what kind of assistance parties are obliged to give to each other in order to secure the proper execution of the project
- Determine key reports to be submitted and timetable

ORGANISATION AND MANAGEMENT

- Define the roles and responsibilities of each party from an administrative, legal, financial and technical point of view
- Specify the additional duties of the leading party
- Define the internal organisation of the consortium
 - management bodies
 - committees and/or working groups
 - communication between the parties
- Describe the different bodies:
 - Role and internal rules
 - How are the members appointed
 - How are decisions taken
 - How many and when will meetings be organized
- Define the procedures set up to monitor the project from a scientific, technical and financial point of view
- Describe procedures in case of additional tasks or review of the initial workplan
- Determine conditions under which existing parties may withdraw from the project, or reduce or increase their contribution
- Define conditions under which additional parties may join the project

FINANCIAL ISSUES

- Indicate the global budget of the project and the planned costs for each party
- If the planning is not observed, explain the mechanism for making changes to the budgets and allocation of work
- Indicate any audit requirements and timetable
- Propose a payment schedule inline with the funding instrument/call
- If Third Countries are involved explain their funding mechanisms

CONFIDENTIALITY

- Define parties' obligations for confidentiality and for how long this is to remain in force
- Indicate to what extent information disclosed by the partners during the project has to be considered as confidential
- Stipulate which type of documents should be stamped and treated as confidential and the eventual exceptions
- Define to which extent publications of the project results are allowed and under which conditions

RIGHTS AND OBLIGATIONS

- Define the specific rights and obligations of Parties;
 - undertaking their work with diligence
 - reporting on time
 - keeping appropriate records
 - attending specified meetings
 - rights of access to facilities by other parties

IP OWNERSHIP

- Determine which and how pre-existing know-how (protected or not) has to be exchanged for the proper execution of the project
- Define how the intellectual property of the project's results will be allocated between the parties
- Describe how joint ownership will be managed
- Define conditions under which property of pre-existing know-how and project results may be transferred between the parties and towards third parties - notably affiliated entities
- Indicate how the project's results will be protected;
 - type of protection
 - duration
 - who pays for the costs

IP ACCESS

- Define the access rights (including financial conditions, if any) to be granted to use the pre-existing know-how and project results (protected or not) during the implementation of the project
- Define the access rights including financial conditions to be granted for exploitation of the project's results
- Determine if and to which extent exclusive licenses may be granted between the parties and towards third parties
- Indicate how the parties will exploit the project results, i.e. jointly or separately, sub licensing etc
- Indicate conditions for exploitation by third parties
- Define potential royalties, or at least principles for agreeing on potential royalties

LIABILITY

- Provisions indicating to what extent a party causing damages or injury to another party or to goods or persons will be held liable
- Define possible actions and financial penalties in case of damage or injury, including in case of withdrawal, fault or dismissal from the consortium
- Define actions, solutions, penalties in case of bankruptcy
- Provide for actions and remedies in case of force majeure

FINAL CLAUSES

- Define when the consortium agreement comes into force and ends. Indicate whether part or all of its provisions are concerned.
- Provide for a flexible procedure where amendments to the consortium agreement would be required.
- Determine the termination clauses and the consequences of the withdrawal of one or more parties, particularly in terms of communication, ownership and exploitation of the project's results.
- Define the working and governing language.
- Provide for a governing law of the consortium agreement.
- Decide and organise which are the dispute resolution methods in case of internal conflict;
 - competent court
 - mediation
 - conciliation or arbitration

OTHER ISSUES – TIPS!

- Be sure to defer to the Grant Agreement
- Establish clear reporting procedures
- Establish clear quality checking provisions
- Regarding dispute resolution – define dispute escalation and notice periods
- Establish risk assessment and control procedures
- Publication procedure for academia
 - Industry – time limit for protection
- Clarify procedures for parties who:
 - under-perform (technically or administratively)
 - become bankrupt
 - are taken over by other companies
 - change their status

SCHEDULES

- Signatures of all Parties – Each countersigned by coordinator
- The Description of Work (DOW)
- Funding tables and grant allocation/timings
- Accession documents to the Grant Agreement
- Description of work for each party
- Management procedures and financial principles
- Parties' declaration of 'relevant' background IP
- Schedule of reporting periods
- List of Parties contact details (Legal and Technical)
- Risk register and agreed contingencies

Coherence with Proposal

- **Proposal** should have clearly stated the IP arrangements
- **Resulting DOW** should clearly state the IP arrangements
- **The CA MUST** be coherent with these

Tip

- If coordinator is worried about IP ownership he can define the concept as their **background**
 - Best done by applying for a provisional national patent(s) based on the key part of the concept

Consortium Agreement Templates

FP7 Models

- Comparison of FP7 consortium agreement models – IPR Helpdesk
 - <http://www.ipr-helpdesk.org/>
- EC check list for Consortium Agreement
 - ftp://ftp.cordis.europa.eu/pub/fp7/docs/checklist_en.pdf

- <http://www.desca-fp7.eu/>
- Collaboration between several organisations from the research sector
- Drafted in a relatively simplified and comprehensive way
- Proposes alternative options for several key clauses, incorporated in the different illustrative examples available
 - “Fair and reasonable”, closer to the provisions of Annex II to the grant agreement
 - “Royalty-free” for a more business-oriented approach
- Proposes 2 alternatives for the internal organisation of the consortium (consortium bodies and decision making) to fit small & large projects
- There is also a special module with detailed provisions on software

- <http://www.aerosme.com/news/article.asp?article=250>
- **IMG4** is drafted by ASD-IMG4 - Industrial Management Group representing the biggest aerospace companies in Europe
- Based on the DESCAs model
- However, it does not propose alternative options, and some IP clauses are modified to fit the needs of FP7 Aeronautics projects
- It includes an agreement to loan material and equipment developed in the project

- http://www.digitaleurope.org/index.php?id=32&id_article=163
- **IPCA - Integrated Projects Consortium Agreement**
- Published by the European Information & Communications Technology Industry Association (EICTA)
- Meant to suit the needs of the industry - contains several clauses supporting the commercial exploitation of the results
- It also contains detailed provisions on software, as well as alternatives (option 1 & 2) in several key clauses
- It also suggests a model *Memorandum of Understanding* for the proposal preparation

EUCAR

- <http://www.eucar.be/>
- **EUCAR**, European Council for Automotive R&D
- Contains provisions that encourage both the economic exploitation and the dissemination of the project results
- Less detailed than the other models but proposes alternatives for the access rights regime and the management of background
- It is accompanied by an optional *Letter of Intent* for the proposal stage

Summary

- **DESCA** seems more appropriate for universities and research centres but can also be used in business-oriented projects (likely to choose the “royalty-free” option)
- **IMG4** is closer to DESCA’s “fair and reasonable” option, with differences meant to facilitate the effective utilisation of the results by the participants
- **IPCA** could be more suitable for projects and partners with a strong focus on commercial exploitation.
- **EUCAR** is also business-oriented, but facilitates the dissemination of the results, as mentioned
- Don’t mix & match, as it could lead to inconsistencies

IPR Online Courses

- *IPR Helpdesk* proposes online modules on Intellectual Property and the EU-funded programmes for research and innovation
- The modules are interactive
 - Can circulate freely among the slides & repeat some sections or skip others if necessary
- There is a quiz at the end of each module to test your knowledge of the issues involved
- <http://www.ipr-helpdesk.org/>
- *TurkeyinFP7* IPR Helpdesk – ipr@turkeyinfp7.eu
- +44 1664 567666

Tips on Reaching Agreement

- **Communicate** with your Partners
- Understand what each of them want
- Ensure that ambitions are realistic and in line with the funding programme
- Everyone should be adequately motivated
- As coordinator it is up to you to drive the agreement
 - Do not be afraid to eject partners who cannot agree
- Send round an early draft
- Try to avoid meetings of lawyers from different parties – collaboration is not their strong point
- Be sure that you understand it

Agenda

- 09:00 – 10:00 Impact
- 10:00 – 10:30 Implementation (1)
- 10:30 – 10:45 Coffee Break*
- 10:45 – 11:45 Implementation (2)
- 11:45 – 12:00 Other Considerations
- 12:00 – 12:30 Finishing Touches
- 12:30 – 13:30 Lunch*
- 13:30 – 14:00 Proposal Evaluation
- 14:00 – 14:30 Role of Coordinator
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- 16:00 – 17:00 Project Management Basics
- 17:00 – 17:30 Preparing for Horizon 2020

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Negotiation Process

Negotiation Guidance Notes for coordinators EC/REA - Version 10 September 2010

- Adapt proposal to the recommendations of the evaluation
 - As per *Negotiation Mandate*
 - Project objectives are 'SMART'
- Define the full work plan of the project in sufficient detail
- Define the work to be carried out by each of the beneficiaries & any potential future expansion of the consortium in sufficient detail
- Agree deliverables & their content, timing & dissemination level
- Agree milestones and their assessment criteria
- Establish an indicative time schedule for the project reviews

Negotiation Process

NEGOTIATION MANDATE

- Project Officer
 - Send him/her Description of Work-Annex 1
- Administrative Officer
 - Your contact for obtaining the grant agreement preparation forms
- Maximum EC financial contribution
- Duration of the project
- Changes in technical content
- Timetable for negotiation

Negotiation Process



- **Project/Scientific Officer**
- Your interface
- Evaluate & Monitor the Project Delivery
 - ✓ Description of Work
 - ✓ Transaction Table
 - ✓ Results Table
 - ✓ Partner changes
 - ✓ Will change over the years!

Legal and Financial Officer

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Ensure Legal and Financial obligations are met

- Project Budget
- GPF Forms
- Issue NEF Log-ins
- A4 Bank Form
- Bank Guarantees
- Financial Viability of Coordinator
- Start Date
- Grant Agreement

Negotiation Facility (NEF)

- Online tool supporting the negotiation process
- Located at Participant Portal
<http://ec.europa.eu/research/participants/portal>
- Main channel for the communication between the Consortium and the Project Officer
 - All administrative, legal and financial data about the projects and the participants are collected and agreed through NEF
 - Negotiation sessions on NEF are open by the EC PO
 - Only the coordinator can submit a session back to the PO

Grant Preparation Form (GPF)

- You will be sent a password for NEF
 - EC's on-line repository for partner information
 - Grant Preparation Forms (GPFs)
- The EC will issue 2 deadlines
 - Unsigned (draft)
 - Final signed forms

Negotiation Process

What documents do you need to start?

- Internal Checklist
- The Proposal as Submitted
- A3 Form as Submitted
- Understand Partner Benefits
- Partner Data – A2 Forms
- Legal Entity Form for each Partner
- Draft Consortium Agreement
- Banking Information

Grant Preparation Form (GPF)

Download the GPF editor

ftp://ftp.cordis.europa.eu/pub/fp7/ict/docs/participating/gpf-editor-user-manual_en.pdf

- Form A1– Our Project
- Form A2.1 – Who we are
- Form A2.2 – Who we are
- Form A2.3 – Authorised representatives
- Form A2.4 – How to contact us
- Form A2.5 – Our Commitment
- Form A2.6 – Data Protection & Coordination Role
- Form A3.1 – What it costs
- Form A3.2 – What it costs (summary)
- Form A4 – Bank Account

EC-FP7-IT-HELPDESK@ec.europa.eu

Grant Preparation Form (GPF)

3 forms have to be signed manually

- Form A2.5, *Our Commitment* ,1 per beneficiary
 - Signed by the authorised representatives of the coordinator & each participant
- Form A2.6, *Data Protection and Coordination Role*
 - Signed by the coordinator's authorised rep.
- Form A4, *Bank Account*
 - Bank stamp
 - Signature of the bank representative
 - Signature of account holder's signature, with date

Draft the DoW

Your DoW is a re-ordered version of the proposal (with a few tweaks)

- Use the Template & EC Guidelines Provided
 - Section 5 and Appendix 6
- Include the Transaction forms
- Amend the content to address any recommendations made in your “Negotiation Mandate Letter”
- Include 2 new tables (not in the proposal)
 - Tentative Schedule of Project Reviews
 - Indicative efforts per activity type per beneficiary

Annex I to the Grant Agreement - DOW TurkeyⁱⁿFP7

Cooperation | Research | Technology

1. **Part A** of Annex I

- Contains the cover page
- Project summary
- List of participants
- Budget breakdown
- Workplan Tables providing details on the project implementation

2. **Part B** of Annex I

- Based on information from Part B of the proposal
- Several sections of the original proposal need to be updated/shortened
- Part B of Annex I is the narrative part of Annex I

Part A – Structured Information

- **Cover page**

Table of contents

- A1. Project summary
- A.2 List of beneficiaries
- A.3 Overall budget breakdown for the project

Workplan Tables

- WT1 List of work packages
- WT2 List of deliverables
- WT3 Work package descriptions
- WT4 List of milestones
- WT5 Tentative schedule of project reviews
- WT6 Project effort by beneficiaries and work package
- WT7 Project effort by activity type per beneficiary
- WT8 Project efforts and costs

Part B – Narrative Information

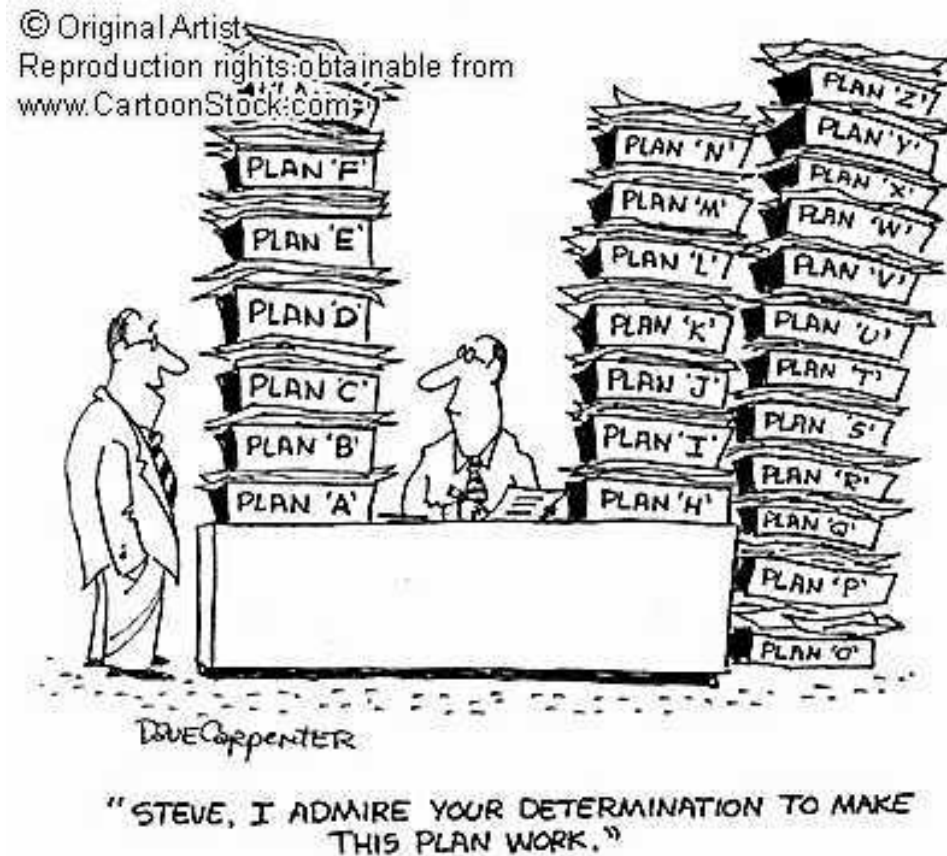
Table of contents

- B1. Concept & objectives, progress beyond state-of-the-art, S/T methodology & work plan
 - B.1.1 Concept & project objective(s)
 - B.1.2 Progress beyond the state of the art
 - B.1.3 S/T methodology & associated work plan
 - B.1.3.1 Overall strategy & general description
 - B.1.3.2 Timing of work packages & their components
- B2. Implementation
 - B.2.1 Management structure & procedures
 - B.2.2 Beneficiaries
 - B.2.3 Consortium as a whole
 - *If applicable* [Sub-contracting], [Funding for beneficiaries from third countries], [Additional beneficiaries / Competitive calls], [Third parties]

Part B – Narrative Information

- B.2.4 Resources to be committed
- B3. Potential impact
 - B.3.1 Strategic impact
 - B.3.2 Plan for the use and dissemination of foreground
 - *If applicable* [Contributions to standards], [Contribution to policy developments], [Risk assessment and related communication strategy]
- [B4. Ethical issues] *if applicable*
- [B5. Consideration of gender aspects] *optional*

Your DOW may need several revisions TurkeyinFP7



...ask a colleague to check it

Validate the legal existence of each beneficiary

- Legal Entity Forms
- VAT Registration
- Company Registration
- Audited Accounts
- Financial ID (Coordinator)

Send and re-send and re-send and...

Your Partners

- Contact each partner (use the most appropriate person)
- “Resell” project benefits
 - To re-establish their commitment!!
- Send
 - Partner information forms (basis for GPFs)
 - Legal Entities Document (Excel)
 - SME check-list (Word)
- In addition each partner must provide
 - Legal registration certificate
 - VAT registration
 - Accounts, balance sheet & proof of number of employees

Financial Verification

At GA negotiation stage

- The EC **do check** the financial viability of the Coordinator as the grant funding will be handled by the coordinator
- Usually, the EC does **NOT** check other SME participants
 - Although they will reserve the right to do this at their discretion

Financial Verification

Does one of your partners need any?

- Yes if they
 - Request an estimate EC contribution >€500k
 - Are identified in the Early Warning System (EWS)
 - If they have been subject to substantial findings following an EC audit within the last 2 years

EC Contract Issue & Signature

- Once the EC are satisfied they will issue draft GA
- Coordinator signs 2 copies & returns 1 to EC
- The EC then Sign
 - At this stage they may release the Pre-financing
- The Partners will “Accede to the GA” by signing Form A’s
- The EC may recommend a start date of the first day of the month after the GA is signed
 - You can make a request for a different start date

Agenda

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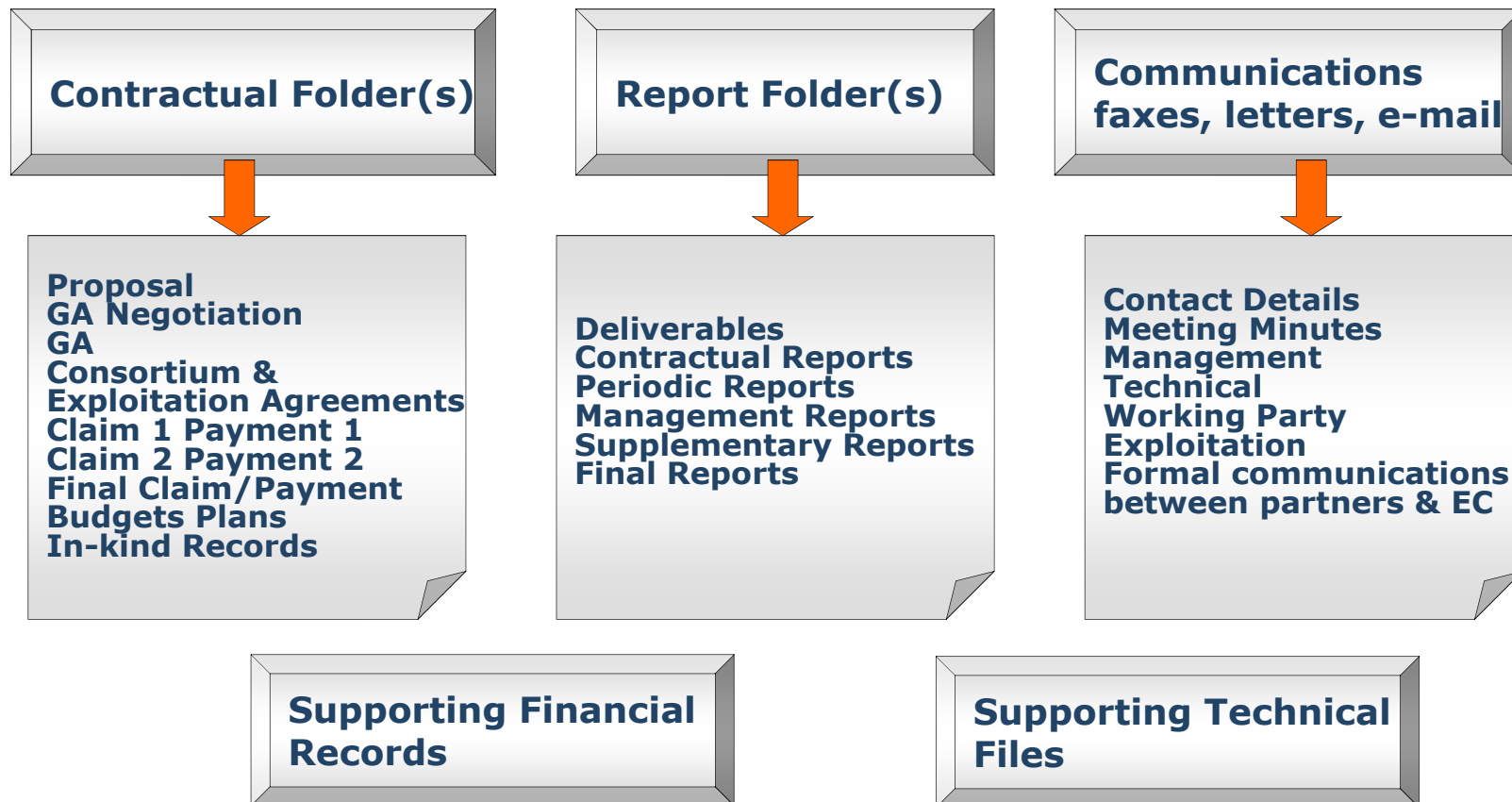
Project Management

Key aspects to focus on in this section

- Record Keeping
- Financial Administration
- Decision Making
- Communication
- Contract Maintenance

Suggested Filing System

TurkeyinFP7
Cooperation | Research | Technology



Essential for any future Commission auditing

Important Records to Keep

- Timecards for ALL staff working on the project
 - Timecards should also include which project task being worked on
 - Day books also VERY useful and to be encouraged for researchers
- Details of salaries for all staff
- Full details of any expenses with all receipts and person travelling
 - Visit reports for all visits where expenses are claimed
- Full details of all Consumables and why they are needed with receipts
- Full details of all Capital Equipment and cost basis for inclusion

Ensure your partners also keep these

Example Timecard Format

Company XXX TIME CARD

Project **Week No.** **W/E**

Staff **Person Month cost** €

WP/Task No		Sat	Sun	Mon	Tue	Wed	Thur	Fri	Tot
1	1.1								0.0
	1.3								0.0
2	2.2								0.0
2	2.4								0.0
									0.0
									0.0
									0.0

Description of Work	

TOTAL	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
--------------	-----	-----	-----	-----	-----	-----	-----	-----

Signed Approved

Decision making

Decisions to be made by the Project Management

- Allocation of tasks and budgets
- Admission or elimination of a partners
- Negotiation of changes with the Commission

The consortium is the executive power over the direction of the project and the work of partners

Decision making

Appropriate Governance of the project

Every one taking part in every decision



Problems and delays in taking decisions

Partner excluded from decision-making



Lack of commitment to the project

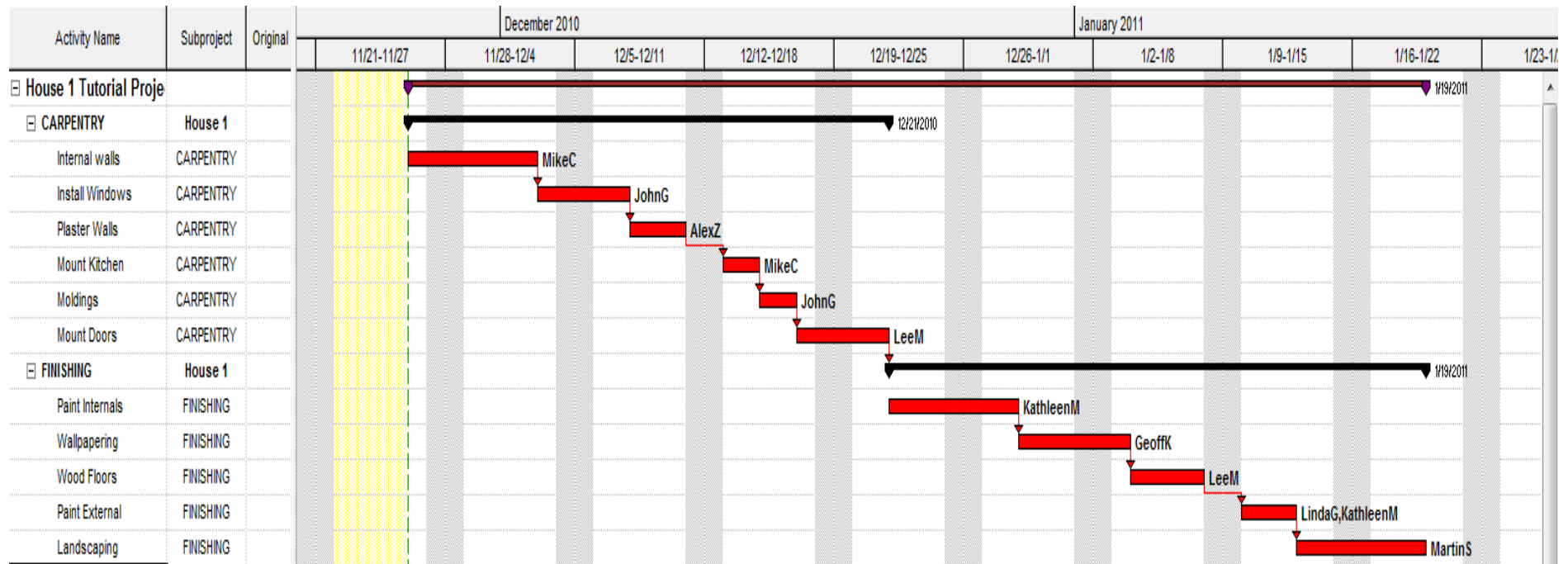
The consortium agreement should include a balanced and efficient decision-making process

Management of time and budget

- Monitor the input of the partners at monthly intervals
- Ensure delivery of the work within each work package
- In case of problems
 - TM will flag the issue to the project coordinator/steering committee
 - They will determine the appropriate course of action
 - Further iterations of the development loop
 - Adoption of alternative technologies
 - Finding alternative development routes
- Use a software tool to monitor your progress

Management of time and budget

Gantt chart & Critical path



Management of time and budget

- Co-ordination of technical progress towards the objectives of the project
 - Collation of all deliverables and milestone reports
 - Risk monitoring and contingency planning
 - Organisation of Technical meetings
 - During the lifespan of a WP or task
 - Whenever necessary (*ad hoc*)

Project Management

The **key** of a successful project management is
PERMANENT COMMUNICATION

How to get it?

By organising **REGULAR MEETINGS**

Why is that so important?

To **MAINTAIN RELATIONSHIPS, REVIEW
PHASES, QUALITY CONTROL, COMMUNICATE
RESULTS, ...**

In 4 words:

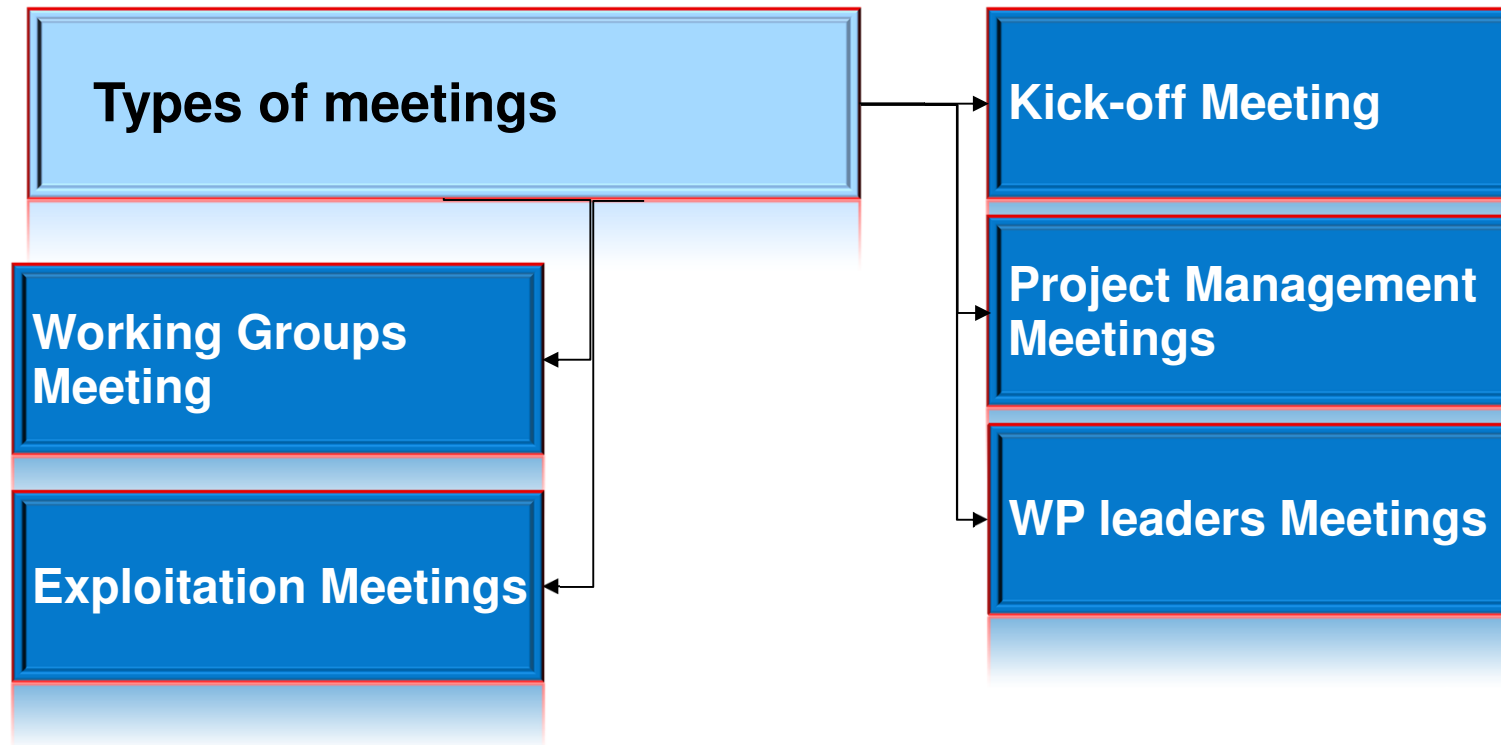
WORK AS A TEAM

Regular Project Meetings

Why are they important?

- Assurance of the smooth implementation of the project
 - Helps with
 - Maintaining relationships
 - Information exchange
 - Reaching agreements and decisions

Meeting Organisation



The kick-off meeting (KO)

- A key event where positive working practices among all partners should be established
- Has a great psychological significance
 - First meeting of some partners
 - Creating working relationships
 - Encouraging of the personal commitment and enthusiasm
 - Resolving first disagreements

The kick-off meeting (KO)

- The consortium must confirm and agree on
 - Detailed management **procedures**
 - Personal role on the **management committee** & responsibilities
 - An **exploitation manager**
 - Person responsible for the exploitation planning and activities of **each partner**

The kick-off meeting (KO)

- The consortium must also
 - Ensure that each person is individually engaged
 - Establish **information exchange mechanisms**
 - Create the **documentation** for
 - Decision making
 - Reporting
 - Delivery
 - Control of information, reports and results
 - Configuration management
 - Quality assessment procedures

The kick-off meeting (KO)

Indicative agenda

Part 1	Administrative Session	Time
Welcome	Introduction of Host Organization	10 minutes
Review	History of proposal - presentation by coordinator	10 minutes
Presentations	Presentation of each partner organisation	10 minutes per partner
Contractual	Explanation of EC contractual requirements Discussion on Consortium Agreement	30 minutes
Management	Review of management structure/ decision making	15 minutes
Procedures	Review of administrative and financial procedures	30 minutes
Training	Review of training requirements for the consortium	10 minutes
Part 2	Technical Session	Time
Project overview	Presentation of the project. Review of technical objectives, deliverables and timescales.	60 minutes
Resources	Review of finances and manpower situation.	10 minutes
Exploitation	Review of exploitation potential. Dissemination plans	40 minutes
Future plans	Agree calendar project calendar. Action plan for next period	30 minutes
Management	Review of management structure/ decision making	15 minutes
Procedures	Review of administrative and financial procedures	30 minutes
Training	Review of training requirements for the consortium	10 minutes
Part 3	Technical Meeting	Typically 1.5 days

Progress meeting

Project Management Meeting

Aimed to review overall project status

Technical review

- Performed activities
- Effort spent to the project
- Other useful data
 - Risks
 - Problems
 - Remedies
 - IPR

Administrative review

- European Commission defines administrative Procedures
- Possible to amend own practices with agreement of consortium

Progress meeting

- Must keep **balance** between the time/effort spent on
 - Technical issues and administrative issues
- Ensure that people attending the meeting are
 - Well **informed**
 - With **capacity of decision/discussion** for technical and administrative issues
- Frequency of Project Management Meetings
 - Should be established with the agreement of the consortium at the **beginning of the project**

Progress meeting Agenda

Agenda Item	Remark	Typical Time
Minutes	Approve minutes of previous meeting. Verify action items.	20 minutes
Management overview	Review of resources used, Co-ordination requirements, outstanding issues and their resolution	30 minutes
Work review	Presentation of work to date on a task by task or partner by partner basis./Identification of issues and their resolution. Summarise achievements	30 - 45 minutes per Workpackage
Resources	Review of progress, finances and manpower situation, with appropriate charts.	30 minutes
Exploitation and Dissemination issues	Review of status of each partners exploitation and dissemination activities and initiatives; suggestions for new initiatives	60 minutes
Future plans	Summary of plans for remainder of project Requirements for update to Technical Annex	45 minutes
Action List	Itemise actions and get person/time Commitment	30 minutes

WP leaders' meeting

- Should include the Coordinator
- Organise WP Leaders' Meetings prior a Project Management Meeting
 - To save travel budget
 - To prepare the Project Management Meeting
- A meeting could be also organised “ad hoc” to face a specific problem

Working Groups Meetings

- They can be useful in several stages of the project
 - At the project launch phase
 - To refine detailed work plan
 - Working groups will design/refine the specific content of the tasks
 - When different problems/difficulties appear
 - To find the most appropriate solution
- Can be also organised to be attended by organisations not belonging to the project consortium
 - To support dissemination activities
 - When survey must be done
 - NDA!

Exploitation Meetings

- Objective
 - Discuss the exploitation of the project results
- All partners should attend
- Exploitation meeting at the 1st and mid-term of the project
 - Plan the exploitation activities according to the possible future opportunities
- More frequent exploitation meetings will usually take place in the last stages of the project
 - When the results are more or less known

Practical Exercise

Things that can go wrong!

- You are the coordinator of an FP7 project
- Getting to the Mid Term (M18) of your project
- You are facing 3 challenging situations!
 1. Partner “LaserUK” has not delivered the expected laser due at M12
 2. SME “PlasticMoulderDE” has been taken over by a large American company; they want to stay in the project
 3. SME “ElectronicComponentsPL” has internal resources difficulties; they need to leave the project

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HORIZON 2020 - How to Prepare

- Strategic positioning of Institution – Be Prepared
- Realignment of research strategies to H 2020
 - Understand your capabilities
- Create new Networks (Cross Disciplinary/Sectoral)
- Influence the new Work Programmes
- Technology Platforms and changes
- Scouting for new information
 - NCPs
 - Workshops
 - Events – Information, Networking

How to Prepare

- Identify policy drivers and why the EC has decided to support the areas it does under the new programme
- Identify potential partners
- Learn the principles of a good work plan
- Understand the impacts and how to put together an effective exploitation and dissemination strategy

How to Prepare

- Keep abreast of developments

Website:

http://ec.europa.eu/research/horizon2020/index_en.cfm?pg=press

Checklist - Preparedness

- Do you know which researchers are keen AND able
- Academic Profiles and short CVs up to date
- Do you have a list of key words for their research areas
- Has each department produced a 1 page profile
- Are these formally recorded on a database
- Are department web sites up to date
- Do you have a schedule of events leading up to H2020
- Have you identified any training needs
- Are you actively engaging young researchers
- Has top level in the administration bought in
- Have any incentive programmes been established
- Does each department have a formal research strategy
- Do you know the person months cost for your researchers

Checklist - Capabilities

- Do you have any unique facilities to offer
- Do you have any unique expertise to offer
- Will you need to invest in equipment
- Are you able to coordinate
- Do you have any specific IP to bring in as background
- Do you have specific legal/IP expertise
- Do you have access to any proposal writing expertise
- Are your researchers given quality administrative support
- Are these resources documented

Checklist - Networks

- Do you have good national/regional academic networks
- Do you have good international academic networks
- Do you have good national/regional commercial networks
- Do you have good International commercial networks
- Are these current and active
- Are you actively setting up new ones
- Have the networks been documented

Checklist - Concepts

- Do you have any potentially suitable concepts for EU Research
- Have you established a process for analysing concepts
- Have you properly analysed them
- How innovative are they
- Do they require an International approach
- Are they needed by the market
- Do you have adequate time and resources to prepare them
- Do you know where in H2020 they fit



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*This project is co-financed by the European Union
and the Republic of Turkey*

FP7 Project Proposal Preparation, Submission and Project Management Training Programme

Day 2

26th November 2013 – Dedeman Hotel, Gaziantep

