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Coordinator vs. Partner
Who does what in a Horizon Europe project?

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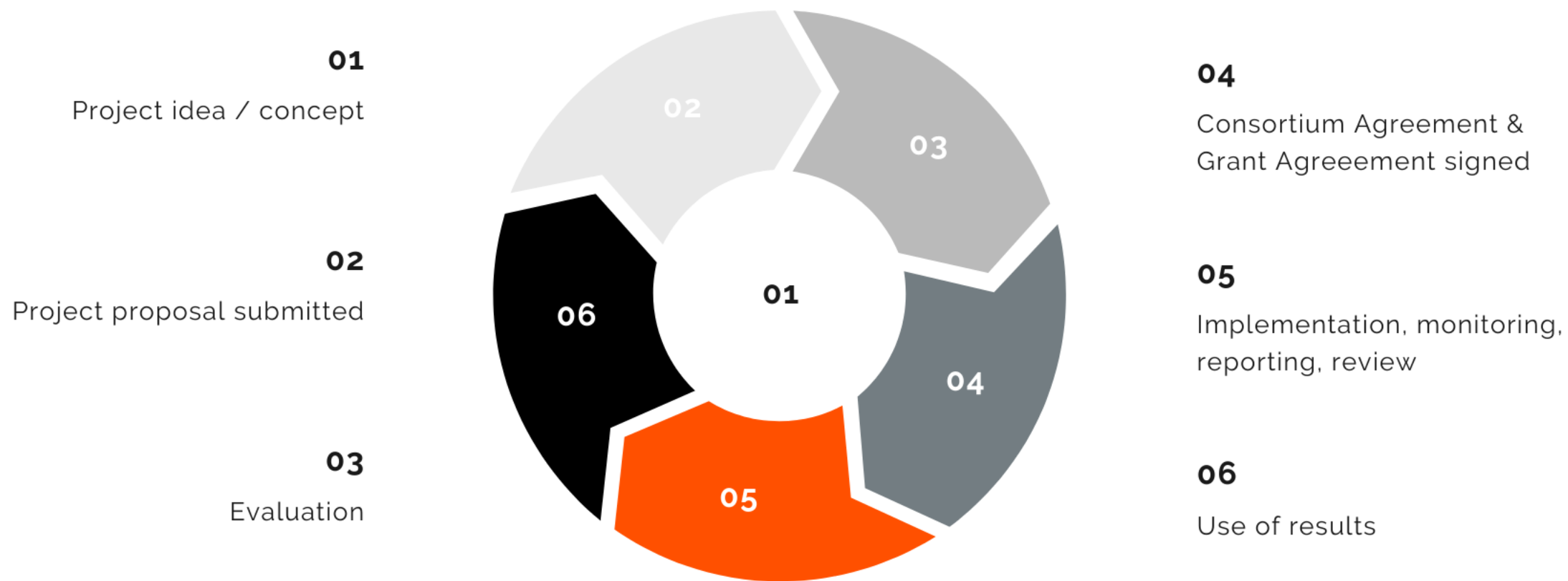**Horizon Europe Project Management and Reporting**
7 May 2024
Webinar

Content

1. Project lifecycle

2. Who is who?

3. Tasks of the coordinator and partners

Project Lifecycle

Overview

01
Project idea / concept

02
Project proposal submitted

03
Evaluation

04
Consortium Agreement &
Grant Agreeement signed

05
Implementation, monitoring,
reporting, review

06
Use of results
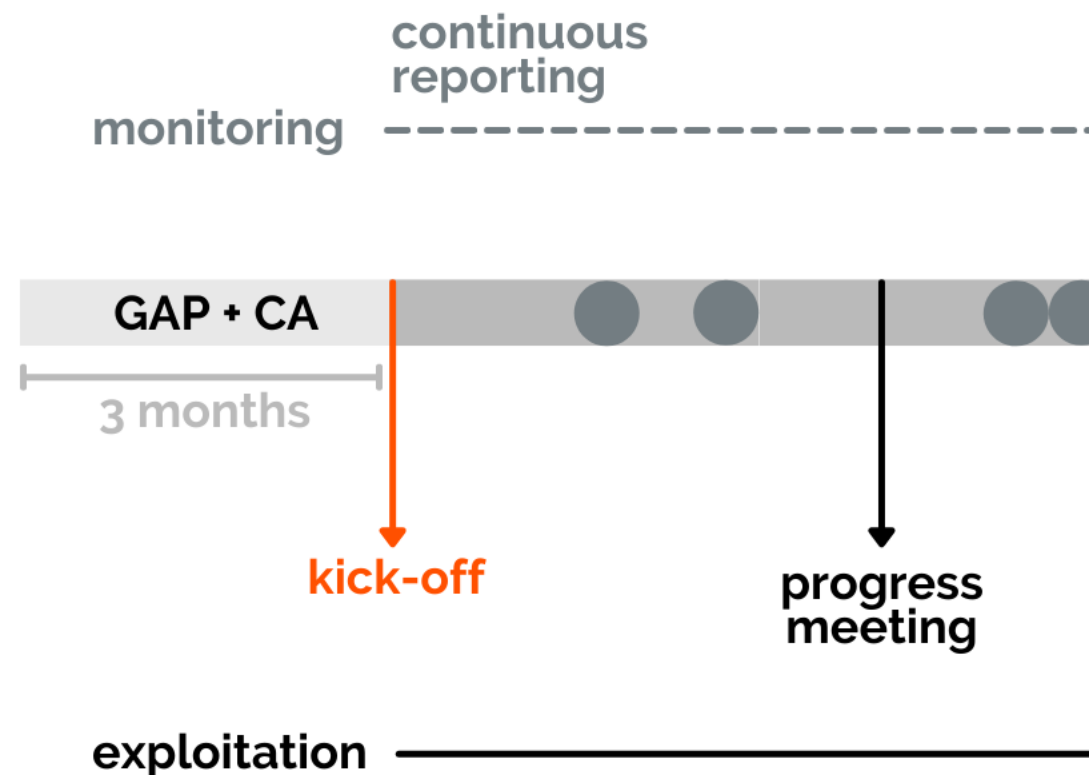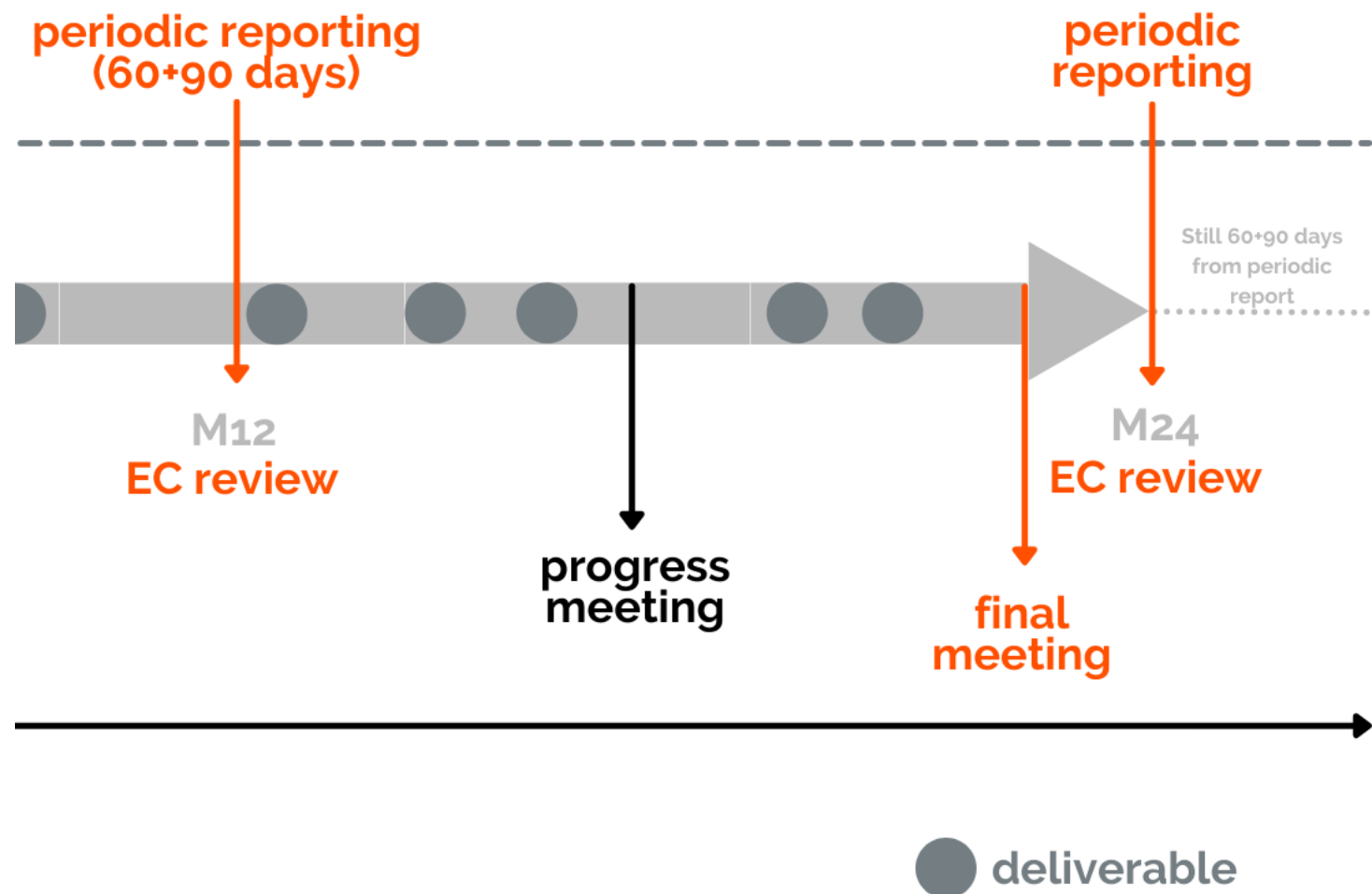
Zoom in: implementation

- 3 months before official start = signing the **Consortium Agreement + Grant Agreement**

- **Kick-off meeting** = soon after the official start of your project

- **Progress meeting(s)** periodically (every 6-12 months)

- **Monitoring** = continuous process from Day 1

- **Continuous reporting** = open from Day 1 for beneficiaries to report on deliverables, milestones, risks, publications, D&C actions, etc. (remains open ever after)

- **Exploitation** of project results = use of results for further research, commercial purposes, standardisation or policymaking

Zoom in: implementation

- **Periodic reporting** = reporting to the EC on the activities carried out (**technical**) & costs incurred (**financial**) over a certain period

- **EC review** = where the EC is monitoring how you have performed so far in your project & whether you are on track

- **Deliverable** = output (information, report, a software, etc.) that must be produced and ready at a given moment during the action

- **Final project meeting/conference** = the event that closes your project

💡 End of project implementation is **NOT** the end of contractual obligations (e.g. best effort obligation).

periodic reporting
(60+90 days)

periodic reporting

Still 60+90 days from periodic report

M12
EC review

progress meeting

M24
EC review

final meeting

deliverable

Zoom in: implementation

Obligations after the end of the project

Check out your GA Data Sheet (!)
For X years after final payment:
- Confidentiality = 5 years
- Record-keeping = 5 years (3 years for grants < EUR 60 000)

For up to X years after the final payment:
- Reviews = 2 years
- Audits = 2 years
- Extension of findings from other grants to this grant = 2 years
- Impact evaluation = 5 years (3 years for grants < EUR 60 000)

💡 Best effort obligation to exploit results = up to 4 years after the end of the action.
💡 If the results are not exploited within 1 year after the end of the action, the beneficiaries must use the Horizon Results Platform to find interested parties to exploit the results.

Who is who?

HE projects

Who is who?

- **Coordinator** LEADS the consortium

- **Beneficiary/Partner/Participant** IMPLEMENTS the activities

- **Affiliated entity** (former Linked third party) IMPLEMENTS the activities

- **Associated partner** IMPLEMENTS the activities without EU funding

- **Subcontractor** DELIVERS an action task

- **Contractor** DELIVERS a good or service

- **Stakeholder** is AFFECTED by the project

- **End-user** USES the results

- **Advisor** HELPS the consortium

Roleplay: the Coordinator

Skills & roles

Skills

- **Scientific/technical** – understand the project & lead the partners
- **Administrative/financial** – knowledge of the rules of Horizon 2020/Horizon Europe
- **Social skills** – leading & motivating the partners

Roles

- Representative of the consortium towards the EU
- Keeps the project on track
- Initiates changes in terms of work content, if needed
- Handles payments
- Initiates, coordinates meetings, drafts agendas
- "Lobbying" for the project

The Coordinator

in real life...

- Work content changes – how to manage?
- Monitors partners performance – what if weak link?
- Handles disagreement between partners
- Oversees spending – what if running low? What if unforeseen expenditure?
- Deals with force majeure
- Mediates cultural differences

What does a Coordinator need?
- Time & patience
- Use charm, be pragmatic or use legal power when needed
- Sense of politics
- Understand what the Project Officer wants from you!

Roleplay
The Partner

Who is the partner?

= one of the other beneficiaries (legal entity) that is NOT the Coordinator

What does a partner do?

- Contribute to CA/GA preparation when coordinators asks for contributions
- Contribute to project implementation with the tasks assigned
- Make sure to deliver on time and according to the rules
- Be proactive
- Ask questions when needed
- Signal issues in advance to the Coordinator

Roleplay

Additional jargon (1)

- **Project Officer (PO) / Project Advisor**

= representative of the EC (executive agency/unit) in charge of overseeing your project

- **Work Package (WP) leader**

= one of the beneficiaries within the Consortium that was assigned the lead a Work Package

e.g. Beneficiary X is the leader of WP y on developing a digital toolbox due to their proven experience in that area

- **Task leader**

= one of the beneficiaries within the consortium that was assigned the lead a specific task

e.g. Beneficiary Z is the leader of Task x in WP y on developing a training methodology because they have proven experience in the area

Roleplay
Additional jargon (2)

- **Innovation manager**

= the organization/person in charge of innovation management (exploitation + IPR)

💡 This role can be assigned to one of the consortium partners.

- **Advisory Board (AB) member**

= group of external individual experts contributing to the project (based on a contract/letter of intent/expression of interest)

💡 When you have such an external body like the AB, you can include relevant provisions in your Consortium Agreement (CA) – Section 6 on Governance structure.

Tasks of the coordinator and partners

Tasks of a coordinator

- Act as a SINGLE legal representative of the Consortium towards the EC and handle all communication between the EC and the consortium.
- Keep the project on track – keeping the deadlines of the deliverables and submitting the reports.
- Initiate changes in terms of work content (in line with the GA).
- Handle the advance, interim and final payments, initiate changes or reallocation in the budget (between categories and partners) (in line with the GA and CA)
- Organise and chair the review meetings.

The above tasks shall not be subcontracted – only in very exceptional cases (e.g. spin-offs for public bodies)

What else?

- Initiate and coordinate meetings, draft the agendas
- Dissemination, marketing of project results, lobbying
- Set up a a good communication, quality assurance and monitoring system – and maintain it, ensuring other partners using it.
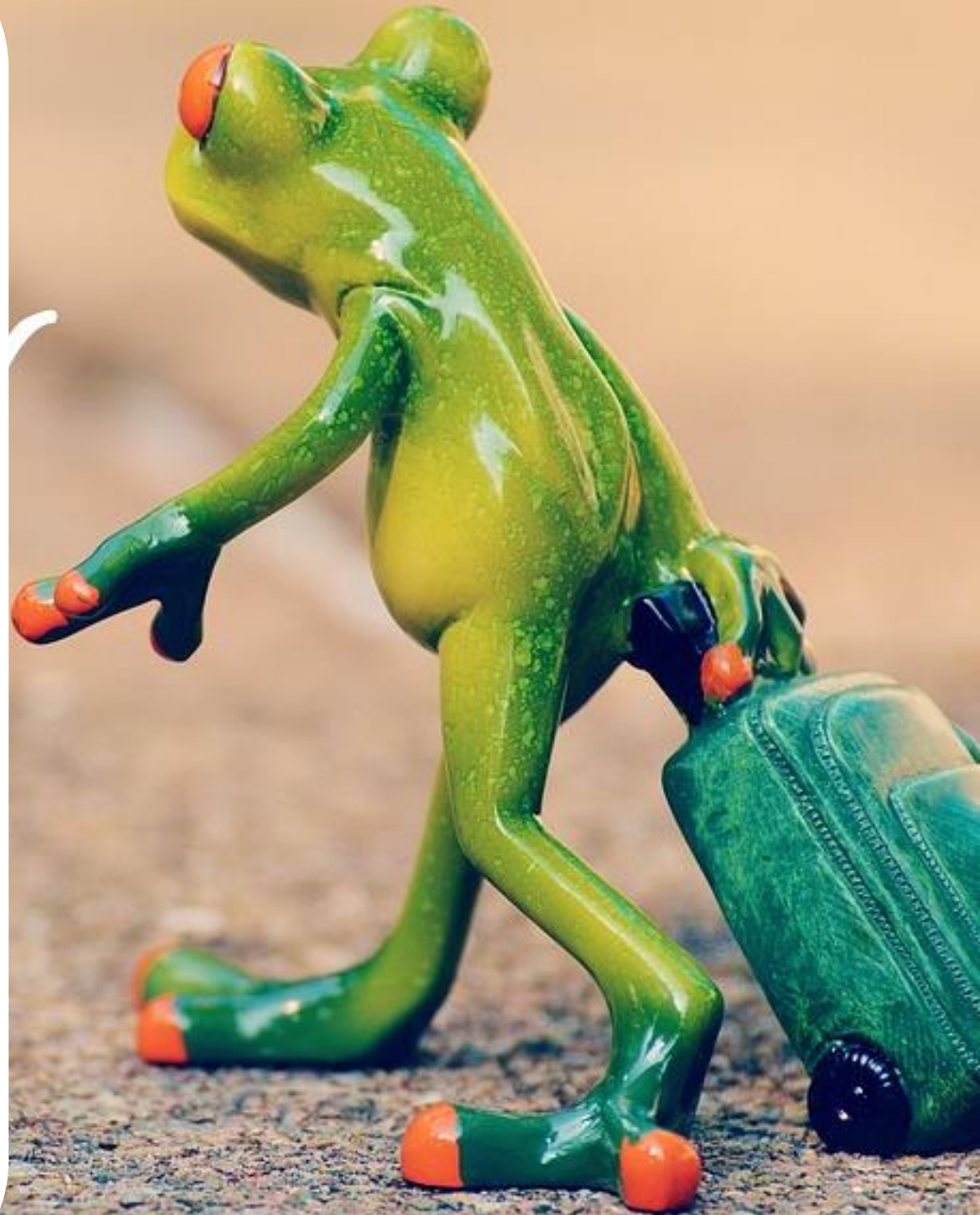- Deal with the unexpected ☺

See full list here: Link

What has changed in HE?

Horizontal issues

- Research data management
- Ethical issues
- Open science
- IPR management
- Exploitation, dissemination, communication

Everyday tasks of a partner organisation

Everyday Management tasks	Internal management within the partner organisation
Communication	Set up and follow communication procedures.
Monitoring of progress, quality	Setting up a monitoring and quality control system – both scientific and financial.
Administration, archiving	Ensuring internal archiving including time recording for project hours/days and all productive hours/day.
Managing unexpected events	Communicating with the coordinator and the partners. Safeguarding own interests.
Managing disputes	Mediation, finding a compromise – safeguarding the interest of the project.
Grant Agreement modification	Communicate with the coordinator.

thank you

for your attention

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