

# Horizon 2020

*& Horizon Europe*

# In-house Training Course Portfolio

# 2019

## Company Structure and Overview

Europa Media Group (EMG Group) Plc is a group of SMEs active in EU research and innovation projects and in training and capacity building on EU project development and management. EMG Group was established with a vision to consolidate under one umbrella 17 years of hands-on experience in developing and managing EU funded research and innovation projects and solid capacity and skills in designing and delivering training and capacity building programmes on successfully developing and managing projects under the EU programmes.

The EMG Group consists of four companies:



**Geonardo Environmental Technologies Ltd.:** a leading SME in Central and Eastern Europe providing services in the energy, environment and sustainable development fields. Geonardo is intensively involved in EU funded projects in the renewable energy, energy efficiency, raw materials, climate change, and resource efficiency fields. [www.geonardo.com](http://www.geonardo.com)



**Europa Media Non-profit Ltd.:** a non-profit SME active in European Union affairs, particularly in EU research and innovation policies, programmes and projects. Europa Media is intensively involved in EU funded projects and EC contracts in international research cooperation, lifelong learning, ICT, entrepreneurship, and training and capacity building fields. [www.europamedia.org](http://www.europamedia.org)



**Europa Media Trainings Ltd.:** the training arm of Geonardo and Europa Media Non-profit, translating hands-on experience in developing and managing EU research and innovation projects into practical training programmes for the European science and technology community and stakeholders. [www.eustrainingsite.com](http://www.eustrainingsite.com)



**Europa Media Innovations** is the newest member of Europa Media Group, providing innovation management and strategy development services, including assistance in open innovation, Horizon 2020 and Horizon Europe strategy support for public and private organisations, funding mapping aid for startups, SMEs and scaleups, and high-level financial consulting. [www.eminnovations.eu](http://www.eminnovations.eu)

## Our History

The **EMG Group** staff's involvement in EU research and innovation projects began in **1999**, when, after the establishment of Geonardo, we developed and submitted our first project proposal under FP5. Coordinated by ourselves, this proposal was successful, and others followed throughout the years under FP6, FP7 and now, Horizon 2020. We have also been involved as coordinator or partner in projects financed under other EU programmes such as CIP, Lifelong Learning, LIFE/LIFE+ as well as under the EEA and Norway Grants.

Building on our direct experience with EU research projects under FP5, FP6, FP7 and Horizon 2020 we have come to realise that there is a need for more a harmonised information provision

on EU funding opportunities and related procedures as well as a need for capacity building on developing competitive proposals and effectively managing projects under the EU's research and innovation programmes.

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### EMG Group in numbers

#### Members:

- Europa Media Non-profit Ltd.
- Europa Media Trainings Ltd.
- Geonardo Environmental Technologies Ltd.
- Europa Media Innovations Ltd.

**Headquarters:** Budapest, Hungary

In-house experts, researchers and trainers:	<b>25+</b>
Proposals directly involved in:	<b>500+</b>
Projects implemented under FP5/6/7 and H2020:	<b>90+</b>
Face-2-Face training courses delivered:	<b>500+</b>
Webinars and e-learning courses held:	<b>50+</b>
In-house courses held at European organisations:	<b>350+</b>

To respond to this need, **Europa Media** was established in **2003** with a mission to provide and present the dispersed and technical information on EU policies, funding opportunities and programmes in a streamlined and simplified way to relevant stakeholders in Europe and worldwide. With this mission, we have

developed, launched and publicised a variety of information sources and tools including web platforms, publications, e-Learning courses, webinars and events. In parallel, we launched our first international training programmes on EU proposal development and project management starting from **2004**.

Over the past 15 years, our team has developed a comprehensive portfolio of training programmes designed to facilitate access to EU funding and simplify EU project development and management, in particular under the EU's research and innovation programmes. To date, we have organized hundreds of training courses attended by over 7,000 participants from all over Europe and beyond. We have also supported many universities, research organisations and SMEs on an advisory/in-house capacity in their efforts to develop winning proposals and effectively implement projects.

**Our multidisciplinary team of experts** has several years of hands-on experience in developing and implementing EU funded research and innovation projects. We have been involved in over 90 projects over the past 17 years as coordinator or partner. The trainers of the EMG Group are day-to-day technical coordinators and financial managers of projects under the EU programmes such as the Research Framework Programmes (FP5/6/7, H2020), CIP Eco-innovation, CIP Intelligent Energy Europe, Lifelong Learning Programme, LIFE/LIFE+ and eContentplus. They conceive and develop their own project proposals in conjunction with European and international partners, and

implement their projects as coordinator or as partner, being a work package or task leader. They also evaluate project proposals on behalf of the European Commission under the Research Framework Programmes, CIP and LLP/Erasmus+.

All of our training courses and advisory services are therefore designed based on this direct experience that we have with **all stages of the project lifecycle**. In our presentations, we convey the necessary theoretical information to our participants, highlighting the most common issues faced during proposal preparation and project management, and sharing our experiences and stories. In our workshops, we let our participants to actually practice proposal preparation, project

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EMG Group's "hands-on approach" is unique in the provision of R&I training and consulting services in Europe.

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management, financial reporting and audits. Over the years, we have developed and continuously updated quite novel workshop materials and practical templates for all the stages of a research and innovation project's lifecycle. These workshops have allowed our participants to carry out real-life simulations and improve their knowledge and skills on proposal preparation and project implementation.

With this **practice-driven learning-by-doing approach**, our goal is to enable researchers, engineers, project managers, financial managers, administrators and other individuals to turn their ideas into successful project proposals and obtain the necessary skills to cope with the administrative and financial challenges of EU funded

research and innovation projects.

Our experts develop their own proposals and coordinate and manage their own projects under H2020 and other EU programmes on an everyday basis, making our training courses and advisory services 100% practice-driven. **No other major player in Europe currently matches this approach**

Our overall approach to designing and delivering the training courses is based on our well-known **"learning-by-doing" methodology**, which consists of a balanced mixture of **practical presentations, hands-on workshops** and **real-life examples**. This methodology has helped distinguish our courses and consultancy services from others over the past 15 years. In the thousands of evaluation forms we received back from our participants at the end of our courses, the practical examples and hands-on workshops have always been the elements they have favoured the most. This is because during these practical sessions our participants get the chance to experience and understand first-hand project management practices and receive pragmatic answers to their questions based on the practical experience we had in same or similar situations in our own projects and proposals

Duration: 2 days  
Maximum number of participants: 20-25

## Short Course description:

*Getting started:* After going through a simple exercise, you will be encouraged to pursue a new way of thinking - a method to ensure that you get started in the right way. You will then further develop your proposal concept step-by-step: defining **sound objectives**, designing an **effective work plan** with work packages, creating a Gantt chart and PERT diagram, defining an **ideal consortium**, and putting together a **realistic budget**.

*Impact and Exploitation workshop:* You will draft the **Expected Impact** section and identify the best scenario for exploitation and **IP strategy**.

*Dissemination and Communication workshop:* Participants will define the relevant target groups and the most appropriate dissemination and communication **tools, channels and strategies** for disseminating and communicating the results of the project with a view to maximizing its impact.

## Training course output:

- ✓ Get an insight into Horizon 2020 and Horizon Europe programmes.
- ✓ Find out how to develop a Horizon 2020 project concept with a new focus. How to take into consideration the changes Horizon Europe will bring.
- ✓ Understand how to work out different strategies for Impact section description.
- ✓ Learn about IP strategies, business models, open access schemes and other exploitation issues.
- ✓ Tailor your communication and dissemination to your results and Impact to be achieved.
- ✓ Learn how to put together a sound project budget.
- ✓ Understand the evaluation process and context to better conceive your proposal.

Prerequisite: None

## Tailor-made?

- ✓ Special focus on research topics/area (based on e.g. a selected call for proposals) for the workshop exercise, when requested by the Client 6 weeks in advance.
- ✓ Focus can be given to a specific funding scheme (CSA, IA, RIA) when requested by the Client 6 weeks in advance.
- ✓ Focus could be also given to a specific target group with special information need on H2020 and Horizon Europe, such as research advisers, NCPs, EU advisers, etc. The agenda for them should be modified according to the information needs.

## Price level:

- ✓ 5,500 to 8,000. EUR, depending on the number of participants and trainers needed

## INDICATIVE AGENDA - DAY 1

**08:30 – 09:00**      **Registration**

**09:00 – 09:15**      **Event opening and introduction to the course**

**09:15 – 10:00**      **Introduction to Proposal Development under H2020**

- Work programmes, calls and topics – budgets, deadlines, submission processes
- General principles and features of H2020 proposals – understanding and fitting appropriately to the EU R&I context
- Types of actions (RIA, IA, CSA) and TRLs – positioning your proposal effectively
- First steps of proposal preparation: Identifying the right call, Call analysis, proposal abstract, background research, consortium building

***Extra session:** How to consider Horizon Europe in your H2020 proposal?*

(10:00 – 10:15 Coffee Break)

**10:15 – 11:15**      **From idea to H2020 proposal – A hands-on approach**

- How to turn your novel idea into a winning concept
- Drafting the Part B of the proposal – From call analysis to submission
- Proposal writing section-by-section – Examples, tips and templates from section 1.1. until 5.2 of the Part B of the proposal with lessons learned from evaluations

(11:15 – 11:30 Coffee break)

**11:30 – 12:30**      **Expected Impact in H2020 Proposals**

- Impact in H2020 proposals – examples of different approaches to addressing the “Expected Impact” of your proposals, lessons learned from evaluations
- Impact in RIAs, IAs and CSAs – how to position your innovation from RTD to market uptake, Dos and Don'ts
- Impact indicators and Impact assessment methodologies
- Barriers to achieving the Expected Impact – Types of barriers, Barriers vs. Risks

(12:30 – 13:30 Lunch)

**13:30 – 16:00**      **Proposal Development Workshop: Concept, Objectives and Work Plan**

Participants are divided into small groups to practice the first steps of proposal development under Horizon 2020: Call analysis, project concept development, formulation of the project objectives and a preliminary work plan. Principles for impact driven concept and proposal development. Defining the work packages, developing a Gantt chart and a PERT diagram, identifying deliverables and milestones, establishing a complementary partnership.

(14:45 – 15:00 Coffee break)

## INDICATIVE AGENDA - DAY 2

08:30 – 09:30

### Impact, Innovation and Exploitation in H2020 proposals

- How to identify and select the best exploitation, IP and innovation strategy to maximise the potential impact of your H2020 project
- Business plans, market uptake strategies
- Exploitation and sustainability – examples of project and partner level approaches and routes
- Pre-proposal and proposal-stage agreements and tools for consortia

(09:30 – 09:45 Coffee Break)

09:45 – 10:30

### Dissemination & Communication in H2020 proposals

- How to tailor an effective dissemination and communication plan to maximise the potential impact of your H2020 project
- Tools, measures, strategies and channels to reach your target group and communicate the right message in the right way
- Requirements of the EC, legal obligations according to the H2020 GA
- Knowledge management, Open Access, Open Data
- Dissemination and communication under Ethics and IPR issues

10:45 – 12:00

### Proposal Development Workshop: Impact and Exploitation

Participants will continue the work in small groups to draft the Expected Impact section and identify the best scenario for exploitation and IP strategy:

- How the project will contribute to each of the expected impacts mentioned in the call
- Substantial impacts not mentioned in the work programme (RIA,IA)
- Barriers - how to differentiate barriers and risks
- Exploitable results and the potential exploitation strategies – how to transform this into a “plan”
- Draft strategy for knowledge management and protection strategy

(12:00 – 13:00 Lunch break)

13:00 – 13:45

### Proposal Development Workshop: Dissemination & Communication

Participants will define the relevant target groups and the most appropriate dissemination and communication tools, channels and strategies for disseminating and communicating the results of the project with a view to maximizing its impact.

(13:45 – 14:00 Coffee break)

14:00 – 15:00

### Proposal Development Workshop: Finalising and submitting the proposal

Participants will identify the efforts and resources to be committed to define a sound budget. By introducing a real proposal, the evaluation summary report, and focussing on the comments on the Impact section, the participants will have a better understanding of the evaluators' perspective.

15:00

### Wrap-up and end of course

**Duration:** 1,5 days

**Maximum number of participants:** 18-20

### Short Course description:

*Hands-on approach:* The course will start with a short introduction to the H2020 proposal template sections and **what/how to write under each section** under the main funding schemes: CSA, RIA, IA.

*Concept workshop:* Based on a specific open call for proposals You will draft the **objectives, work plan, partnership, outputs and outcomes** for your project.

*Impact and Exploitation workshop:* You will draft the **Expected Impact** section and identify the best scenario for exploitation and **IP strategy**.

*Dissemination and Communication workshop:* Participants will define the relevant target groups and the most appropriate dissemination and communication **tools, channels and strategies** for disseminating and communicating the results of the project with a view to maximizing its impact.

*Budget workshop:* You will **draft the budget** for the project you are planning to submit.

### Training course output:

- ✓ Develop a project together with experts for a specific call of your interest!
- ✓ Understand how to work out different strategies for Impact section description.
- ✓ Learn about IP strategies, business models, open access schemes and other exploitation issues.
- ✓ Tailor your communication and dissemination to your results and Impact to be achieved.
- ✓ Learn how to put together a sound project budget.

### Prerequisite:

- ✓ This course is intended for those who know about the H2020 programme, its funding schemes and have already submitted at least one H2020 proposal as a partner or as a coordinator. Also, the organisation can identify one thematic priority in which an open call could be selected for the course generating specific interest from researchers and research advisers – blue growth, food security, etc.

### Tailor-made?

- ✓ Special focus on research topics for the training – to be requested by the Client 4 weeks in advance.

### Price level:

- ✓ 5.000 to 7.000. EUR, depending on the number of participants and trainers needed



### INDICATIVE AGENDA - DAY 1

**10:30 – 11:00**      **Registration**

**11:00 – 11:30**      **Event opening**

**11:30 – 13:00**      **Proposal Development under Horizon 2020 – A hands-on approach**

- How to turn your novel idea into a winning concept
- Types of Actions (RIA, IA, CSA) and TRLs – positioning your proposal effectively
- Drafting the Part B of the proposal – From call analysis to submission
- Proposal writing section-by-section – Examples, tips and templates from section 1.1. until 5.2 of the Part B of the proposal with lessons learned from evaluations
- What can we learn and use from the draft Horizon Europe programme description?

(13:00 – 14:00 Lunch break)

**14:00 – 15:30**      **Workshop: Proposal Development – Part 1: Concept and objectives**

Participants are divided into small groups to practice the first steps of proposal development under Horizon 2020: Call analysis, project concept development, formulation of the project objectives and a preliminary work plan.

(15:30 – 15:45 Coffee break)

**15:45 – 17:00**      **Workshop: Proposal Development – Part 2: Work Plan**

Defining the work packages, developing a Gantt chart and a PERT diagram, identifying deliverables and milestones, establishing a complementary partnership.

End of the first day

### AGENDA

### DAY 2

**9:00 – 10:00**

#### **Workshop: Proposal Development – Part 3: Expected Impact**

- How the project will contribute to each of the expected impacts mentioned in the work programme topic
- Substantial impacts not mentioned in the work programme (RIA, IA)
- Barriers - how to differentiate between barriers and risks

(10:00 – 10:15 Coffee break)

**10:15 – 12:00**

#### **Workshop: Proposal Development – Part 4: Dissemination, Communication, Exploitation**

Participants will define the relevant target groups and the most appropriate dissemination and communication tools, channels and strategies for disseminating and communicating the results of the project with a view to maximizing its impact. A draft PEDR will be developed.

Participants will also identify the best scenario for exploitation and IP strategy:

- Exploitable results and the potential exploitation strategies – how to transform this into a “plan”
- Draft strategy for knowledge management and protection strategy

(12:00 – 12:45 Lunch break)

**12:45 – 14:00**

#### **Workshop – Part 5: Budget; Finalising and submitting the proposal**

Participants will identify the efforts and resources to be committed for the project, with a focus on dissemination and exploitation to define a sound budget. By introducing a real proposal together with the relevant evaluation summary report, the participants will have a better understanding of the evaluators' perspective and get prepared to evaluate a real proposal.

End of the workshop.

Duration: 2 days

Maximum number of participants: 25

### Short Course description

The course will cover all challenges you can face in a H2020 project. Our scope is to provide you with the knowledge we have, the tools we use and skills we acquired in the past 19 years and in our 16 running/closed H2020 projects. What can go wrong or what challenges we mean? Here are a few issues:

- Project management for handling non-performing partners, creating a team from individual partners, dealing with conflicts, internal reporting and EC reporting etc.
- Administrative issues related to documents you should collect and archive, time and costs to administer properly;
- Legal difficulties related to the Consortium Agreement, IPR protection;
- Financial issues related to cost eligibility, budget transfers, payment arrangements;
- Communication and PR internally, with the European Commission, the research community, the industry or the wide public.

You will experience Europa Media's well-known "learning-by-doing" approach – presentations to start with, then use your newly-acquired knowledge during the workshops specifically designed for the particular topics. We give you real problems to solve and tools that help you solve them.

### **Workshop: Project Management Role-Play**

- Each participant will become a partner in a problematic project
- The trainer will represent the European Commission – helping you? guiding you? You will see...
- You will have to face together – or individually – challenges that happen frequently in H2020 projects – based on real experience! We show-case our challenges we were facing since 2014.

Learn by Playing!

- Believe us when we state: The real experience of the participants will make each game quite special, non-repeatable!

Learn from others!

### **Exercise: Tools and templates in a H2020 project**

Word templates and excel sheets might give you the best tools to manage the project smoothly – how to show to your partners what will happen and when – how to collect information and data from your partners for the EC – how to monitor the budget – how to monitor the action affecting the impact. Participants get the tools that can be easily tailored for their own project(s). Two exercises will show-case the practical use and value of these tools.

### Workshop: Financial Management and Reporting

- Exercises on Financial reality
- Participants will practice how they can manage issues with budget spending, budget transfers and
- fill in their Financial Statement using some available information and numbers and in the same time calculating some personnel and other direct costs

### Training course output:

- Have the proper H2020 management tools and understand why, when and how to use them
- Get an insight to Horizon 2020 financial issues
- Find out how to cope with challenges in project implementation
- Practice how to allocate costs and prepare your Form C
- Learn how to put together technical reports

**Prerequisite:** none

**Tailor-made?** Special focus on management sections (legal /management/ dissemination & exploitation/ finance/etc.) for the presentations, when requested by the Client 6 weeks in advance!

**Price level:**

- ✓ 5.500 to 8.000. EUR, depending on the number of participants and trainers needed

### INDICATIVE AGENDA – DAY 1

**08:30 – 09:00**

#### **Registration**

**09:00 – 09:30**

#### **Event Opening**

**09:30 – 10:15**

#### **How to Coordinate and Manage your R&I Project**

Essential project management and coordination tools and tips. Dealing with the partners. Motivation and Controlling tools. Legal and administrative obligations. Possible administrative and technical bottlenecks, legal problems.

(10:15 – 10:30 Coffee Break)

**10:30 – 11:30**

#### **Legal Agreements in a H2020 proposal and project**

Non-Disclosure Agreements; Letters of Intent; Memoranda of Understanding; Letter of Commitment. Subcontracting and Third-Party Agreement.

Grant Agreement – what are the rights and obligations you committed to? Consortium Agreement: what and how to include; decision making procedures, obligations and rights, financial issues and managing task and budget reallocations. Tips – what to include and how? Amending a Grant Agreement – when and how?

(11:30 – 11:40 Short technical break)

**11:45 – 12:45**

#### **Getting your Project Started**

Kick off meeting. Set-up the project management tools – a web platform or a package of word and excel templates? Web-based communication, telcos or f2f events? How many how often? How can you plan your budget spending and monitor it? How do you monitor the development of new knowledge, generation of new IP to be protected?

(12:45 – 13:30 Lunch break)

**13:30 – 14:45**

#### **Technical Management, Reviews and Reporting**

Periodic and final reports: what to and how to report, irregularities and deviation management, internal quality assurance mechanisms – how to check deliverables or general quality of your actions, problem solving, tips for effective internal management of your partners and their reporting obligations. How do you follow dissemination or exploitation actions your partners do? Introduction to the official online reporting tools and show-case of a real H2020 report. What happens on a review, how is it organised?

(14:45 – 15:00 Coffee Break)

**15:00 – 16:00**

#### **Workshop: Management Role-Play – Part 1**

Participants will play a game – entering a project consortium of unknown partners, knowing only their own tasks instead of having a good overview on all activities and results that the project should deliver. From the very start throughout the project duration they must face together certain challenges – legal, management and financial problems. All participants will play different roles – representing partners with different interests. Your trainer will be the Project Officer - helping you most of the time ... let's see.

### INDICATIVE AGENDA - DAY 2

**09:00 – 10:30**

#### **Workshop: Management Role-Play – Part 2**

Participants will continue the game – additional challenges will be solved related to dissemination, exploitation, partner conflicts – and a partner having serious financial problems. Hopefully you will be able to finalise the project and get all the max. EU contribution set in the Grant Agreement.

(10:30 – 10:45 Coffee Break)

**10:45 – 12:30**

#### **H2020 Financial Rules in theory and in practice**

Detailed introduction to financial rules for H2020 with real-life examples:

- Basic facts
- Importance of the budget and of the resources;
- Cost vs Price principle
- Reimbursement models, forms of costs;
- Eligible and non-eligible costs with comparison and all exceptions;
- Direct/Indirect costs;
- Personnel costs calculation – showing the possible ways;
- Travel costs, Consumables vs. Overheads;
- Indirect costs calculation;
- Funding Rates and EC payments;
- Guarantee Fund;
- Certificates on Financial Statements, Certificate on Methodology, etc.

(12:30 – 13:30 Lunch)

**13:30 – 15:30**

#### **Workshop: Budget monitoring and financial reporting**

Participants will have to solve financial challenges. Two exercises will be given that can be solved in groups or individually. The first exercise will refer to a budget monitoring, budget transfer issue. In the second part you will have to finalise a financial statement for a virtual Horizon 2020 project, based on some numbers available and some documents that can give you the remaining numbers (documents will be invoices, salary slips, receipts and bills, time records and certificates).

(14:45 – 15:00 Coffee Break)

**15:30 -16:00**

#### **Final questions, evaluation and closure of the course**

**Duration:** 1 day  
**Maximum number of participants:** 20

### Short training description:

The course will provide the participants with a sound understanding of the options for the scope and content of consortium agreements that can effectively complement the Grant Agreement in Horizon 2020 projects. To fully understand what should be included into the Consortium Agreements and how, we will introduce the rights and obligations deriving from the Grant Agreement and discuss what other types of legal agreements may exist before signing the Consortium Agreement.

### Workshop: How can the CA help in managing the project smoothly?

We will conduct a hands-on workshop on consortium agreements for H2020 projects, during which the participants will work in groups on different case studies to discuss how to draw up an effective Consortium Agreement. For this exercise, we will introduce different real-life scenarios with problematic and challenging situations in H2020 projects such as conflicts on IPR and exploitation issues, disagreements on dissemination and publications, delays and quality problems in reports and deliverables, risks on financial management, and other budgetary problems. Under the moderation of a workshop leader, the participants will discuss and try to identify appropriate procedures, management structures, and specific clauses a Consortium Agreement shall include to effectively tackle such situations.

### Training course outputs:

- Get to know the options for formal and informal agreements between H2020 beneficiaries at the different stages of an H2020 project, starting from pre-proposal and proposal stage until Grant Agreement signature.
- Understand default rights and obligations from the GA concerning financial issues, management of IPR, and dissemination exploitation of results
- See options on addressing decision making procedures and management structures, financial and budgetary issues, risk management and conflict resolution mechanisms, and IPR and exploitation issues in the Consortium Agreements.
- Compare model consortium agreements such as DESCA 2020, EUCAR and MCARD-2020 as well as other support structures.

**Prerequisite:** none

### Tailor-made:

Discuss one specific Consortium Agreement in cooperation with the own legal personnel of the Client, when requested by the Client 6 weeks in advance!

### Price level:

- ✓ 3,500 to 5,000. EUR depending on the number of participants and trainers needed

### INDICATIVE AGENDA

**09:00 – 09:15**      **Registration**

**09:15 – 09:45**      **Event Opening**

**09:45 – 10:15**      **Formal and Informal Arrangements among H2020 Beneficiaries: From the H2020 Proposal to the Grant Agreement**

Confidentiality and commitment issues in H2020 proposals. Partners' roles, exploitation interests and IP. Pre-proposal and proposal stage agreements: Letters of Intent (LoI), Letters of Commitment (LoC), Memoranda of Understanding (MoU), Non-disclosure Agreements (NDA), Draft Consortium Agreements.

(10:15 – 10:25 Short Break)

**10:25 – 11:30**      **The H2020 Grant Agreement and the Consortium Agreement: Roles, Responsibilities, and Options**

Key terms and definitions in the multi-beneficiary H2020 Grant Agreement. Roles, rights and obligations of the Coordinator and Beneficiaries in the GA and the CA. Default clauses on financial issues, management of IPR, and dissemination exploitation of results – making a comparison between the GA and the CA.

(11:30 – 11:45 Coffee Break)

**11:45 – 12:30**      **How to draw up an Effective Consortium Agreement**

Decision making procedures and management structures. Financial clauses, budget distribution and management. Defining Background, Results and IPR issues. Risk management and conflict resolution mechanisms. Introduction and comparison of Model Consortium Agreements and examples of Consortium Agreements for different types of actions.

(12:30 – 13:30 Lunch break)

**13:30 – 15:30**      **Workshop: Consortium Agreement Case Studies**

Under the moderation of trainers, participants work in groups on real-life scenarios with problematic and challenging situations in H2020 projects and discuss how to draw up a good Consortium Agreement that helps effectively tackle such situations:

- Conflicts on exploitation and intellectual property rights (IPR) issues;
- Disagreements on dissemination and scientific publications;
- Delays and quality problems in deliverables and periodic/final reports;
- Overspending and underperforming partners;
- Inadequate budget allocations and budget reallocations;
- Termination/inclusion of a partner and partners going bankrupt.

(14:30 – 14:45 Coffee Break)

**15:30**              **Final Q&A and closing of event**



Duration: 3 days

Maximum number of participants: 20

### Short training description:

The ultimate training course for those interested in getting the fully-detailed information on all Horizon 2020 related Financial issues, from budgeting through cost reporting 'till EC-driven financial audits.

The 3-day master programme includes:

- ✓ Introducing the Horizon 2020 financial rules from the very basics to the most advanced issues using a hands-on, real-life approach.
- ✓ An advanced workshop on financial reporting, where participants are receiving a package consisting of timesheets, salary slips, invoices, contracts, per-diem certificates and mission reports for a virtual H2020 project. They will then have to calculate the eligible costs and submit a financial statement
- ✓ Hands-on discussion on how financial issues shall be handled during reporting, including deviations, errors or other bottlenecks
- ✓ Introducing the EC-driven audit procedures, its purposes, and potential risks
- ✓ A workshop on EC Audit – participants become auditors for a day and will investigate the financial reports and full documentation of a virtual H2020 project to find all errors and deviations

### Training course outputs:

- ✓ Learn everything about the financial rules of H2020 - find out what is new, what has changed and how to get the most out of your budget.
- ✓ Participate in Europa Media's well-known Financial Reporting and EC Audit workshops and prepare your financial statement (Form C) and simulate a real-life audit.
- ✓ Discover the mistakes you made during the workshops and find out how to avoid making them again.

**Prerequisite:** participation on a Level 2 management course, or experience in H2020 financial reporting

**Tailor-made?** potential short consultancy session on specific issues when held in-house

**Price level:**

- ✓ 9.500 to 11.000. EUR, depending on the number of participants and trainers needed

### INDICATIVE AGENDA - DAY 1

**09:00 – 09:30**      **Event opening**

**09:30 – 11:00**      **Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 1: The Basics**

Detailed introduction to the financial rules of H2020 with real-life examples:

- Basic facts
- Importance of the budget and of the resources
- Cost vs Price principle
- Basic financial principles in theory and practice
- Form of Grants, Forms of Costs
- Eligible and non-eligible costs with comparison and all exceptions
- Direct and indirect costs

(11:00 – 11:15 Coffee break)

**11:15 – 12:15**      **Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 2/1: The Practicalities**

Introducing the cost categories

- Personnel costs calculations – showing the possible ways:
- Employees and other employment contracts
- Financial-year based vs monthly-based calculation
- Number of productive hours to consider
- Additional remuneration
- Bonuses, fringe-benefits and other complements
- Unit-based personnel costs calculation
- In-house consultants and seconded employees
- SME-owner rates

(12:15 – 13:00 Lunch)

**13:00 – 14:00**      **The Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 2/2: The Practicalities**

- Subcontracting and other third parties
- Travel costs, Consumables vs. Overheads
- Equipment and assets
- Internally invoiced items
- Indirect costs calculation

**14:00 – 14:30**      **The Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 3: The Easy stuff**

- Funding Rates
- Receipt calculations
- Guarantee Fund
- Certificates on Financial Statements, Certificate on Methodology, etc.
- Payments and Exchange rates

(14:30 – 14:45 Coffee break)

**14:45 – 16:00**      **Workshop: Financial Reporting – Part 1**

**Introduction** - Participants will prepare a financial statement for a virtual Horizon 2020 project, based on "dummy" invoices, salary slips, receipts and bills, time records and certificates, which are generated individually for each participant.

### INDICATIVE AGENDA - DAY 2

**09:00 – 10:30**      **Workshop: Financial Reporting – Part 2**

(10:30 – 10:45 Coffee break)

**10:45 – 12:00**      **Understanding the Financial Reports**

Pragmatic approaches in reporting; Point-by-point assessment of the prepared financial reports: Format, content; overall principles, possible bottlenecks, what should and should not be included.

(12:00 – 13:00 Lunch)

**13:00 – 14:15**      **How to deal with Financial issues in the Periodic Reports**

Step-by-step guide on how to report costs, deal with deviations, and internal allocation issues. Handling the EC requests for clarification, suspension of payments and other issues with hands-on approach.

(14:15 – 14:30 Coffee break)

**14:30 – 15:00**      **European Commission driven audits in theory**

Technical and financial audits and reviews – how do they happen? What is the Beneficiaries' and the Commission's perspective: Pragmatic approaches in financial reporting

**15:00 – 16:00**      **Individual consultancies, Q&A session**

### INDICATIVE AGENDA - DAY 3

**09:00 – 09:15**      **Workshop: The EC Audit – Kick-off Meeting: Briefing of the "Auditors"**

The Participants (Auditors) are briefed about the Workshop – introducing the audited company, its accounting and management principles, and the project that is being audited. Defining the scope of the Workshop.

**09:15 – 12:00**      **Workshop: The EC Audit**

Participants become EC Auditors – all participants receive a special H2020 package, including Financial Statements (Form Cs), full financial background documentation, a project periodic report and other supporting documentation for a virtual H2020 project. The primary objective is to identify the mistakes and/or miscalculations in favour of both the EC and the Beneficiary, and to summarise them in a Draft Audit Report.

(10:30 – 10:45 Coffee break) / (12:00 – 13:00 Lunch break)

**13:00 – 14:15**      **Analysis of the Workshop**

Discussing the findings of the audit process, finalising the Draft Audit Report. Possible consequences and outcomes of the EC Audits.

**14:15 – 14:45**      **European Commission driven audits in reality**

Experiences with EC Audits: how to prepare – format, content, overall principles, possible bottlenecks, what should and should not be included, project closure and audits. Lessons learned from previous FP7 and H2020 EC Audits

**14:45 – 15:30**      **Final Q&A and personal consultation**

### Tailor-made Horizon 2020 Financial Management and Consultancy

**Duration:** 3 days, including:

- 1-day training course with 2-day Consultancy/Mock Audit; or
- 2-day training course with 1-day Consultancy/Mock Audit

**Maximum number of participants:** 20, for the training day(s)

**Tailor-made?** Fully tailor-made to the specific needs of the Beneficiary/Client

**Short training description:**

**A Level-3 Horizon 2020 Finance event** fully adapted to the needs and requirements of the Client. Tailor-made agenda, including a 1-day or 2-day intensive training course on the financial rules of H2020, **reflecting the organisations' administrative and fiscal protocol(s)**; and a 1 or 2-day Consultancy session, including a H2020 project mock audit, system-level audits and consultancy on the Horizon 2020 costs allocations and reporting of the Beneficiary.

The 3-day schedule includes:

- ✓ Introducing the Horizon 2020 financial rules from the very basics to the most advanced issues using a hands-on, real-life approach.
  - **Optional:** advanced workshop on financial reporting, where participants are receiving a package consisting of timesheets, salary slips, invoices, contracts, per-diem certificates, and mission reports for a virtual H2020 project. They will then have to calculate the eligible costs and submit a financial statement
  - **Optional:** Hands-on discussion on how financial issues shall be handled during reporting, including deviations, errors or other bottlenecks
- ✓ "Mock-audit" of a selected Horizon 2020 project of the organisation
- ✓ High-level consultancy and assistance on system-level financial issues concerning Horizon 2020 cost allocations and reporting

**Training course outputs:**

- ✓ Learn everything about the financial rules of H2020 - find out what is new, what has changed and how to get the most out of your budget.
- ✓ Beneficiary level system-audit on Horizon 2020 cost allocations and reporting, with recommended changes and/or adjustments
- ✓ Mock-audit on a selected Horizon 2020 project of the Beneficiary (optional)

**Prerequisite:**

- ✓ For Grant Office staff, controllers, Finance Dept., HR, and Payroll personnel

**Price level:**

- ✓ 10.500 to 12.000. EUR, depending on the number of participants and trainers needed

### INDICATIVE AGENDA - DAY 1

- 09:00 – 09:30**                    **Event opening**
- 09:30 – 11:00**                    **Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 1: The Basics**
- Detailed introduction to the financial rules of H2020 with real-life examples:
- Basic facts
  - Importance of the budget and of the resources
  - Cost vs Price principle
  - Basic financial principles in theory and practice
  - Form of Grants, Forms of Costs
  - Eligible and non-eligible costs with comparison and all exceptions
  - Direct and indirect costs
- (11:00 – 11:15 Coffee break)
- 11:15 – 12:15**                    **Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 2: The Practicalities**
- Introducing the cost categories
- Personnel costs calculations – showing the possible ways:
  - Employees and other employment contracts
  - Financial-year based vs monthly-based calculation
  - Number of productive hours to consider
  - Additional remuneration
  - Bonuses, fringe-benefits and other complements
  - Unit-based personnel costs calculation
  - In-house consultants and seconded employees
- (12:15 – 13:00 Lunch)
- 13:00 – 14:00**                    **The Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 2: The Practicalities - CONTINUED**
- Subcontracting and other third parties
  - Travel costs, Consumables vs. Overheads
  - Equipment and assets
  - Internally invoiced items
  - Indirect costs calculation
- 14:00 – 14:30**                    **The Hitchhiker's Guide to the Financial Rules of Horizon 2020 Part 3: The Easy stuff**
- Funding Rates
  - Receipt calculations
  - Guarantee Fund
  - Certificates on Financial Statements, Certificate on Methodology, etc.
  - Payments and Exchange rates
- (14:30 – 14:45 Coffee break)
- 14:45 – 16:00**                    **Discussion on Beneficiary-specific issues**

### INDICATIVE AGENDA - DAY 2 – Option A

#### 09:00 – 11:00 **Workshop: Financial Reporting – Part 1**

**Introduction** - Participants will prepare a financial statement for a virtual Horizon 2020 project, based on “dummy” invoices, salary slips, receipts and bills, time records and certificates, which are generated individually for each participant.

(11:00 – 11:15 Coffee break)

#### 11:15 – 12:30 **Understanding the Financial Reports**

Pragmatic approaches in reporting; Point-by-point assessment of the prepared financial reports: Format, content; overall principles, possible bottlenecks, what should and should not be included.

(12:30 – 13:30 Lunch)

#### 13:30 – 14:45 **How to deal with Financial issues in the Periodic Reports**

Step-by-step guide on how to report costs, deal with deviations, and internal allocation issues. Handling the EC requests for clarification, suspension of payments and other issues with hands-on approach.

(14:45 – 15:00 Coffee break)

#### 15:00 – 16:00 **Financial Reporting, EC Reviews and Audits**

Technical and financial audits and reviews – how do they happen? The Beneficiaries' Perspective: Pragmatic approaches in financial reporting; Experiences with EC Audits: how to prepare – format, content, overall principles, possible bottlenecks, what should and should not be included, project closure and audits.

### INDICATIVE AGENDA - DAY 2 – Option B

#### 09:00 – 16:00 **Mock Audit & Face-to-Face Financial consultation**

Checking the financial documentation of a selected Horizon 2020 project, including in-depth analysis of the personnel costs calculation, the eligible salary components and productive hours used. Cross-checking the documentation and justifications of any third-party costs, other costs, and internally invoiced items.

High-level financial consultancy, including system-audit-like approach on tracking and calculation of Horizon 2020 project expenditures. Modelling of different personnel costs calculation methods, considering the costs- and time-saving options.

### INDICATIVE AGENDA - DAY 3

#### 09:00 – 15:00 **Mock Audit & Face-to-Face Financial consultation**

Same as Day 2 – Option B