

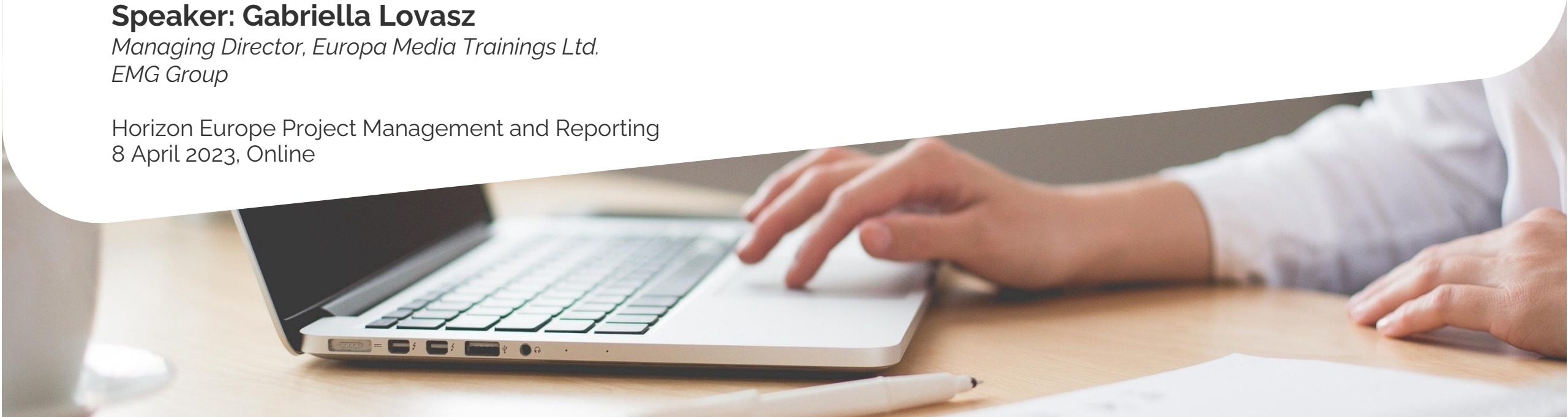
# Partner vs Coordinator

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# Content

1. Who is who? Who is responsible for who?
2. Tasks of the coordinator
3. Project lifecycle

# Lifecycle overview



**1**

**Who is who?  
Who is responsible  
for 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
- **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

- Single representative of Consortium towards the EC
- Keeps the project on track
- Initiates changes in terms of work content if needed
- Handles payments
- Initiates, coordinates meetings, drafts...
- “Lobbying” 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 expenditures?
- Deals with force majeure
- Mediates cultural differences
- ...

### **What does a Coordinator need?**

- Time & patience
- Use charm, be pragmatic or 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 preparations when coordinators asks for contributions
- Contribute to the project with the tasks assigned
- Making sure they do their own work on time and according to rules
- Being proactive
- Asking questions when needed
- Signaling issues in advance to Coordinator



# Roleplay

## Additional jargon (1)

- **Project Officer (PO)**

= 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 on 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 on a specific Task

**e.g.** Beneficiary Z is the leader of Task x 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)**

= 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 such provisions in your Consortium Agreement (CA) – Section 6 on Governance structure.



# 2

## **Tasks of the coordinator**



# Tasks of a coordinator

- Acts as a SINGLE legal representative of the Consortium towards the EC and handle all communication between the EC and the consortium.
- Keeps the project on track – keeping the deadlines of the deliverables and submitting the reports!
- Initiates changes in terms of work content (in line with the GA)
- Handles the advance payments and interim instalments, initiates changes or reallocation in the budget (between categories and partners) (in line with the GA and CA)
- Organises and chairs the review meetings.

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

# What else?

- Initiates and coordinates meetings, drafts agendas
- Dissemination, marketing of project results, lobbying
- Sets up a a good communication, quality assurance and monitoring system – and maintains it, ensuring other partners using it.
- Deals with the unexpected 😊

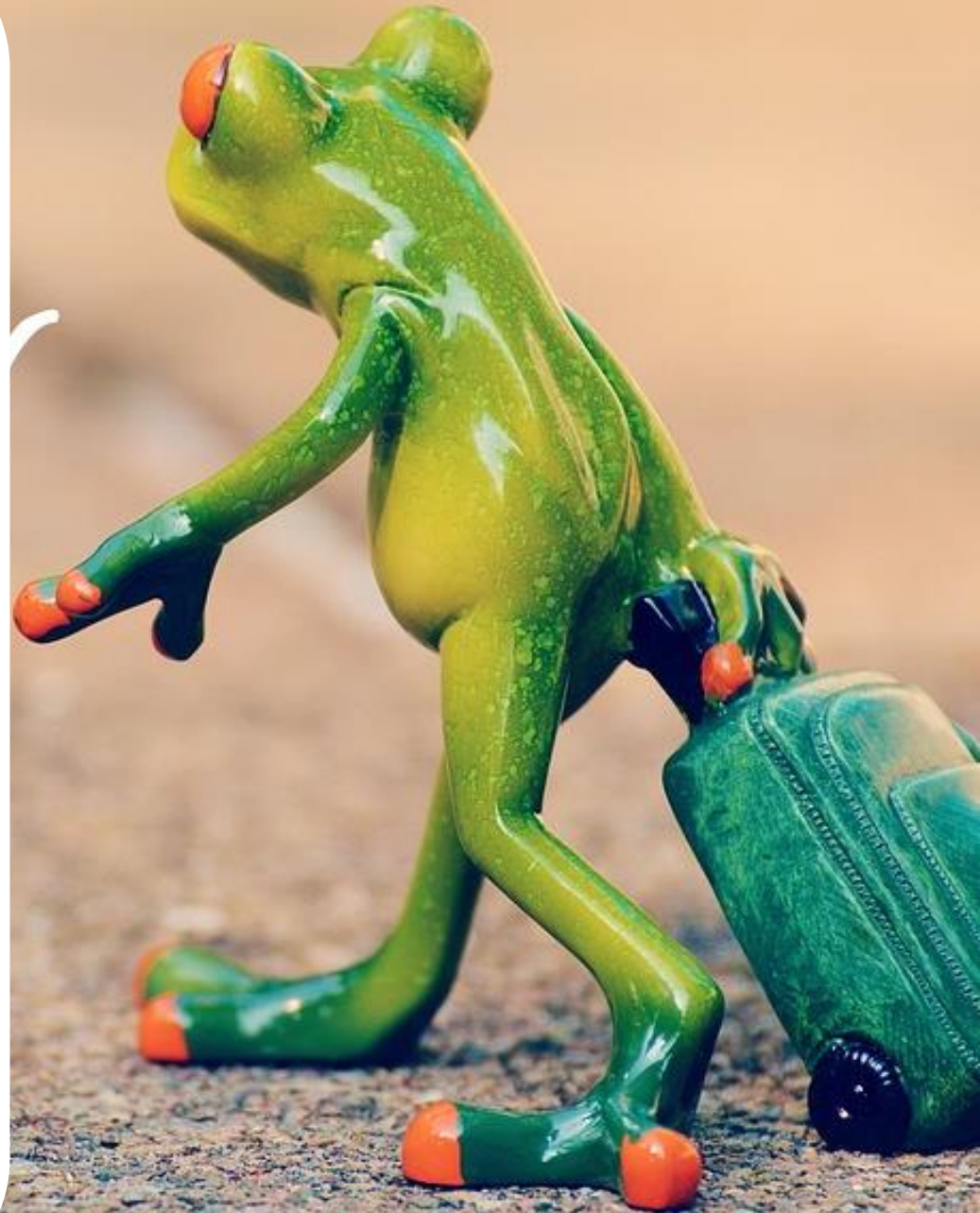
See full list here: [Link](#)



# What has changed in HE?

## Horizontal issues

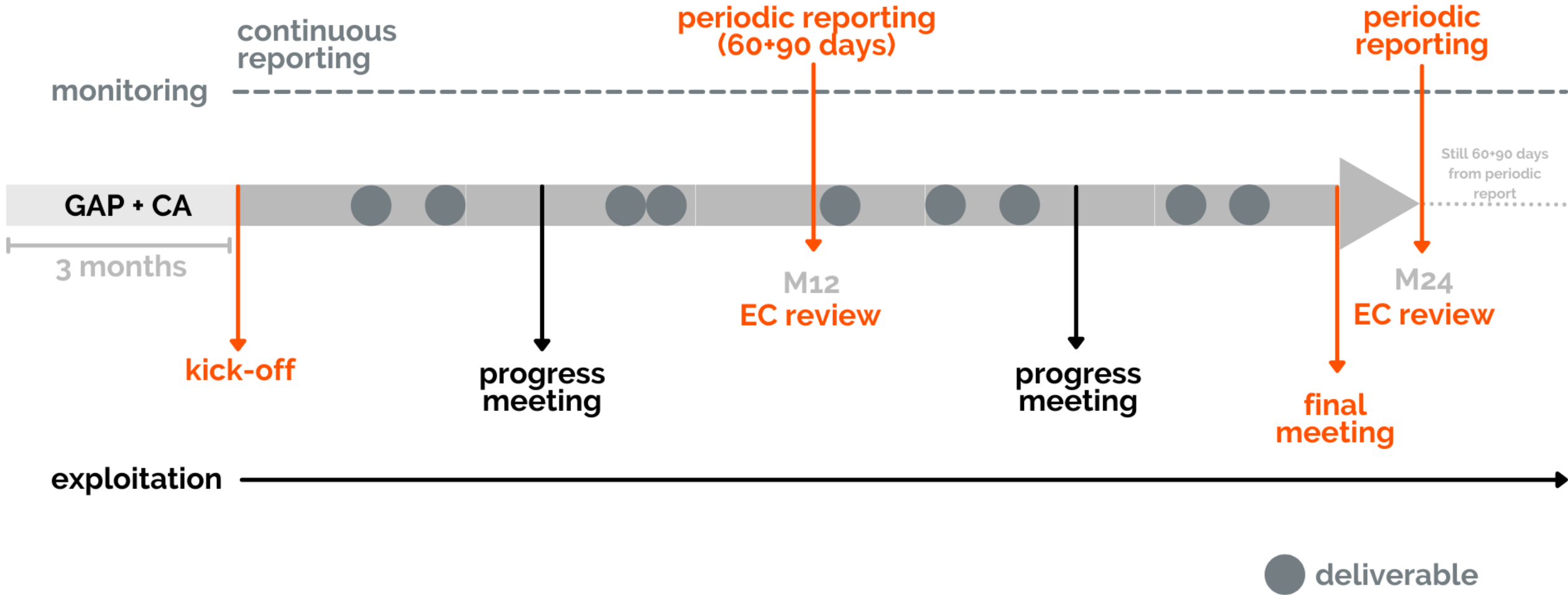
- Research data management
- Ethical issues
- Open science
- IPR management
- Exploitation, dissemination, communication



3

**Project lifecycle**

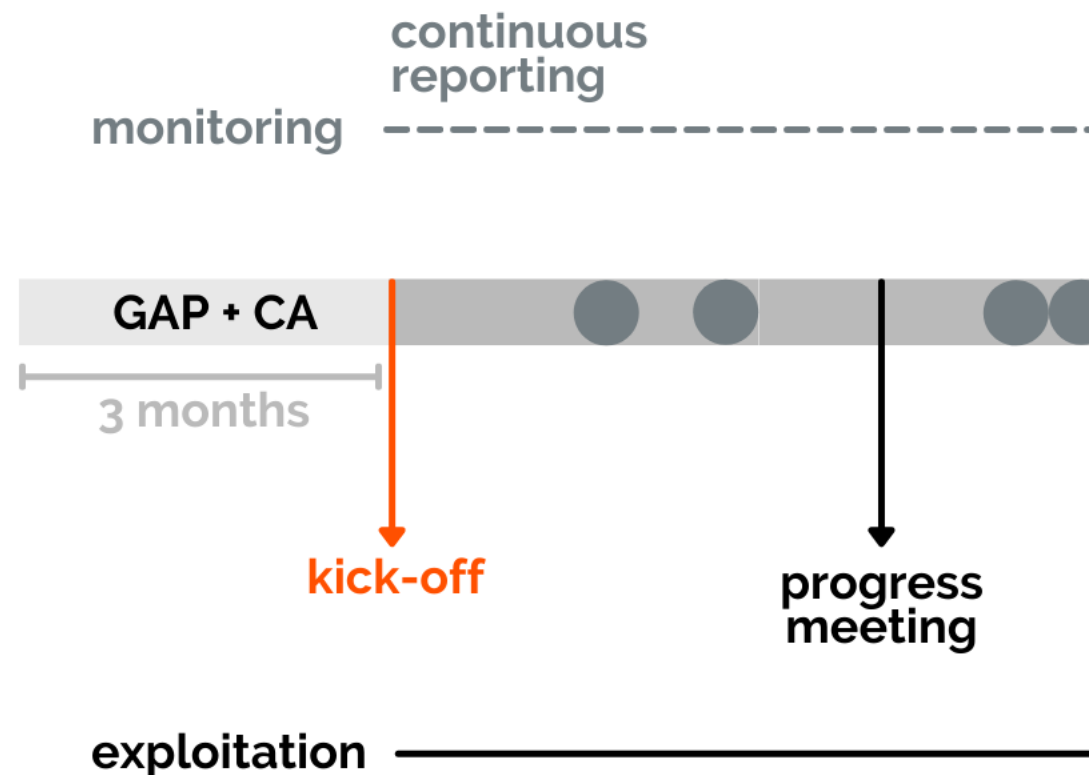
# Zoom in: implementation





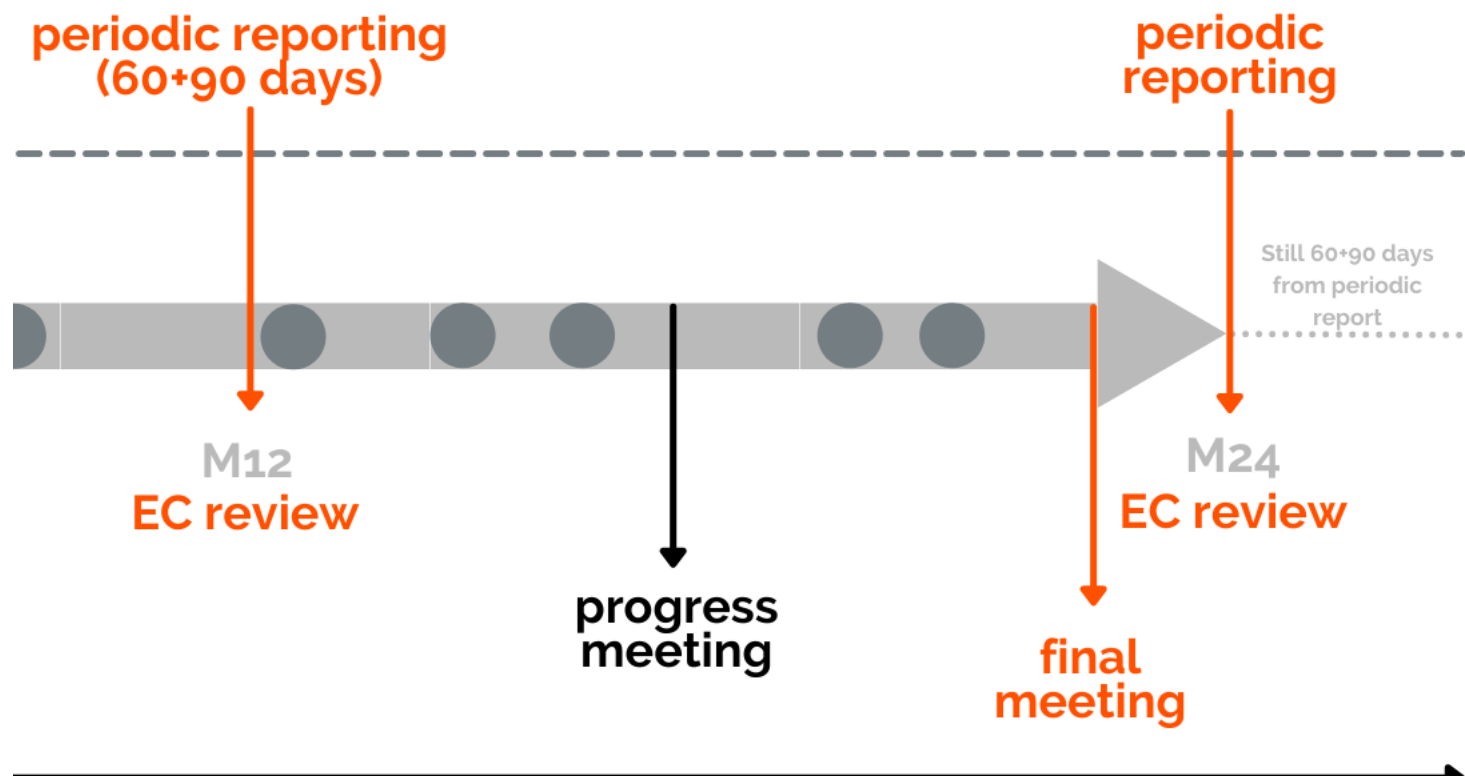
# Zoom in: implementation

- 3 months before official start = signing **Consortium Agreement + Grant Agreement**
- **Kick-off meeting** = official start of your project
- **Progress meeting(s)** periodically (every 6-12 months)
- **Monitoring** = continuous process since day 1
- **Continuous reporting** = open since day 1 for beneficiaries to follow up on risks, ethics issues, publications, report progress on milestones etc. (stays open ever after)
- **Exploitation** of project results = use of results for commercial purposes or in public policymaking



# Zoom in: implementation

- **Periodic reporting** = reporting to the EC on the activities done (**technical**) & finances (**financial**) over a certain period
- **EC review** = where EC is cross-checking on how you have done so far in your project & whether you are on track
- **Deliverable** = output (information, report, a software...) that must be produced at a given moment during the action
- **Final project meeting** = the meeting that closes your project



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

# Everyday tasks of a partner organisation

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

# 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 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.



A black clothespin is attached to a thin, dark string that runs diagonally across the frame. The clothespin is holding a white rectangular card. The card has the word "QUESTIONS?" written on it in a bold, orange, sans-serif font. The background is a plain, light-colored wall.

**QUESTIONS?**

# THANK YOU!

*for your attention*

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