EM TRAININGS

Europa Media Trainings
Webinar & training course portfolio

2023

I.   Webinars

Short webinars

Introduction to Horizon Europe

The webinar gives an introduction to Horizon Europe, EU's 9th Framework Programme for research and innovation.

Looking for partners and joining consortia

This webinar will help you to understand what type of partners to look for in Horizon Europe, if you are proposing a joint project in Horizon Europe og simply are looking for a consortium to join.

You will understand what characterizes a winning consortium in Horizon Europe, and you will get practical advice and tools that you can use when searching for project partners.

Call analysis in Horizon Europe Step-by-step

Did you know that many elements to be included in the different sections of your Horizon Europe proposal are actually "hidden" in the call text you are targeting? Furthermore, the call text also bears essential information that should be considered to ensure compliance with various cross-cutting Horizon Europe priorities and specific EU policies.

We will take a real Horizon Europe work programme topic implemented as a Research and Innovation Action (RIA), and conduct a call analysis on it, showing step-by-step how to extract elements that can be useful for the proposal: Objectives – Activities – Outputs – Outcomes – Partners/Stakeholders/End-users – Cross-cutting issues.

After this webinar, you will be able to apply the call analysis methodology to any Horizon Europe work programme topic you will be targeting.

Budgeting of Horizon Europe proposals

The most common question of a new coordinator of a proposal – **where do I start when building my budget?** There can be many obstacles on this road, and it is definitely not a smooth ride. On the contrary, this can be one of the most challenging parts of the proposal development, whether we deal with lump sum or reimbursement scheme.

During this webinar, we will give some practical advice and real-life examples of hurdles you can encounter and also how to solve them! This will be an interactive webinar and get ready to share your opinions and solutions on:

- When should you start building the budget?
- What are the approaches and which ones should you take when getting information from the partners?
- How do you resolve a conflict, get to the balanced budget and not go over the suggested amount?

Essential tools and "weapons" for a top-notch coordinator

Good and smooth management asks for some practical tools and templates to keep track of your project implementation and deliver your project results on time and in quality.

And many more short webinars upon request…

Get it right series

Get it right! - From Grant Agreement to Continuous Reporting (3 x 90 minutes)

The series will introduce the preparatory tasks and the initial first steps of your project implementation, from the moment the ESR and GAP Invitation Letter arrives to the first reporting obligation, the Continuous Reporting.

Session I. – Grant Agreement preparation

This section will guide you through step by step the labyrinth of the Grant Agreement preparation. We will discuss the main steps, tasks, responsibilities, and the pitfalls and difficulties that require special attention from the consortium. During the session, we will briefly go through what has changed in the GA and what the novelties are compared to H2020.

Session II. – Kickstarting your Horizon Europe project

This session will introduce the main sections of the CA that need to be considered the most during the implementation of your projects, such as financial clauses, budget distribution, results, and access rights, including some tips. We will also introduce the best practices of a good management system which is supported by clear and practical tools that will enable you to efficiently deliver your project results. We will showcase tools that we crafted based on our extensive experience with managing projects e.g. internal technical and financial reports, risk management, IP management, and assessing the D&C activities of the partners.

Session III. – Continuous Reporting in Horizon Europe

In this session, we will introduce the main steps and the responsibilities of the partners and the coordinator in Continuous and Periodic Reporting. We will discuss when and how the reporting obligations should be completed and what are the best practices, internal templates, and tools for collecting data for Continuous and Periodic Reporting. During the session, we will also look at the Horizon Europe continuous reporting portal and introduce what's new and what's changed. The session will also briefly introduce how to prepare the H2020 periodic technical and financial reports: what to and how to report, deviations, tips, and tools for effective internal management of your partners and their reporting obligations.

Get it right! - Horizon Europe Proposal Writing Series (3 x 90 minutes)

The series of three 90-minute-long webinars to make sure your Horizon Europe proposal is excellent. The webinars focus on Cluster projects, so RIA, IA and CSA actions in Pillar II.

Session I. - The new proposal templates (Excellence & Implementation) (90 + 30 min)

What to include and how to describe it – methodologies for structuring the content will help. How to address all old and new sections (open science or gender dimension in research or in-kind contribution, etc)? How to understand the instructions properly? The exercises and tables will help you put together the sections keeping the page limitation, focusing on the key messages.

Session II. - The new proposal templates (Impact) (90 + 30 min)

Learn how we did it – what was working and what not? Tools and methods for the impact pathways and your draft PEDR. We will share feedback from the evaluators and exercises that your consortium partners should repeat for the analysis of the different perspectives on impact from all of them.

Session III. – Budget development (90 + 30 min)

Understand financial rules, help evaluators with balanced staff effort distribution, plan budget for all key activities, calculate the average weighted PM rate, travel, equipment, subcontracting, etc.

Get finances right! (2 x 90 minutes)

This webinar will not only help you understand the financial reporting checklist, but we will share with you several useful tips, tricks and good practices that will help you manage your finances. The webinar focuses on Cluster projects, so RIA, IA, and CSA actions in Pillar II.

Session I. Budget Monitoring
The first part will focus on a checklist of financial matters related to budget development and mainly budget monitoring. The trainers will focus on the implementation of the project and spending the budget while referring to some key tips on budget development.

Session II. Personnel cost reporting H2020 vs. Horizon Europe
The second session will go in-depth into the hourly rate calculation in H2020 and the daily rate calculation in Horizon Europe through a specific example. We will see the bottlenecks and unclear issues as the AGA is not final and audit guidelines are still just showing the coming soon message.

I.   Training courses delivered online or face-to-face.

Lump sum courses

Lump sum projects in short

Lump sum funding is increasingly used in Horizon Europe to make the programme simpler by removing the need to report actual costs and reduce the financial error rate. It is meant to simplify the funding mechanism while all the main features of the research funding stay the same.

However, the details are always important; simplification comes at a price, and these are the specific extra tasks and rules that everyone applying for lump sum funding should be aware of – both when writing a proposal and implementing a project.

Over half a day, the course will cover:

- Main features of lump sum funding
- How to define the lump sum in your proposal and lump sum budget table tips to define sufficient units for your costs
- Distribution and number of work packages in your proposal and how it is linked to the payment system of lump sum projects

- Evaluation of the lump sum proposals
- Grant preparation of your lump sum projects – specific articles in your Grant Agreement and tips to specify lump sum features in your Consortium Agreement
- Changes in your lump sum project implementation – how to amend your lump sum grant?
- How to report your lump sum project, with a detailed introduction to periodic reporting.
- How to deal with partially completed work packages and how to report deviations of your lump sum projects
- Keeping records – what you need and don't need to keep
- Payment schedule – Partial payment

Lump sum proposals and projects in Horizon Europe

Lump sum funding is increasingly used in Horizon Europe to make the programme simpler by removing the need to report actual costs and reduce the financial error rate. It is meant to simplify the funding mechanism while all the main features of the research funding stay the same. However, the details are always important; simplification comes at a price, and these are the specific extra tasks and rules that everyone applying for lump sum funding should be aware of – both when writing a proposal and implementing a project.

This 1,5-day course will dig into the details of writing proposals and managing projects with a lump sum budget. Consisting of practical presentations and workshops, it will cover the following topics:

- The main features of lump sum funding
- How to define the lump sum in your proposal – tips to define units and estimate sufficient budget and resources for your lump sum budget
- Distribution of tasks and planning of work packages in your proposal and how it is linked to the payment system of lump sum projects
- Evaluation of the lump sum proposals – how your estimated costs and planned resources will be assessed and scored
- Grant Agreement preparation in lump sum projects – specific articles in your Grant Agreement and tips to specify lump sum features in your Consortium Agreement
- Changes in your lump sum project implementation – how to amend your lump sum grant?
- How to report your lump sum project, with a detailed introduction to periodic reporting
- How to deal with partially completed work packages and how to report deviations in your lump sum projects
- Keeping records – what you need and don't need to keep for reviews, checks and audits
- Payment schedule and partial payment in lump sum grants

Proposal Writing, 1-day

This course will **provide a practical insight and advanced tips for writing and submitting competitive proposals** under the 2023-2024 calls of Horizon Europe. It is built on our **direct, hands-on experience** gained in developing and managing EU research and innovation projects over the past 20 years. The trainers of Europa Media are actual project managers, coordinators and financial administrators, **currently running seven Horizon Europe projects – one as coordinator – while also preparing proposals to submit** under the open and forthcoming calls of Horizon Europe. This course is designed based on this direct experience and is therefore **100% practice driven**.

In this webinar, you will learn all about the features of winning Horizon Europe proposals and get equipped with the right tools to develop your proposal and polish it to perfection. The combination of practical presentations and hands-on tips and stories will introduce all the aspects you need to know, from putting together your concept not to developing each section and sub-

section of your proposal and submitting a competitive application. **We are sharing our first-hand experiences from the first submissions and evaluations.**

Topics covered:

- How to make sure your proposal fully matches the call text: call analysis, proposal design, consortium composition, cross-cutting issues
- Key features of a successful Horizon Europe proposal – understand the elements that will make your proposal stand out amongst others
- From proposal concept to full proposal: Proposal writing from the coordinator's and partner's perspective
- How to compose text and fill in the application forms: Practical tips, examples and ready-to-use templates for Excellence, Impact and Implementation
- Key steps and success criteria for winning Horizon Europe proposals: How to finalise and polish your proposal before submission
- Evaluation of horizontal aspects: how to address gender, ethics, SSH and interdisciplinary aspects of your proposal
- Special focus: Lump sum proposals – how to design the work plan and resources, and coordinate the detailed budget preparation in lump sum grants

Project management and reporting, 1-day

This course will provide a **practical insight and advanced tips** for managing your Horizon Europe projects and will assist you in gaining a **comprehensive overview of project management and reporting activities of Horizon Europe.**

This webinar is built on our **direct, hands-on experience** gained in developing and managing EU research and innovation projects over the past 20 years. The trainers of Europa Media are project managers, coordinators and financial administrators, **currently running seven Horizon Europe projects – one as coordinator – meaning submitting periodic reports, managing GA changes and preparing financial statements under these** Horizon Europe and many more H2020 grants. This course is designed based on this direct experience and is, therefore **100% practice driven**.

In this webinar, you will learn all about the **tasks and responsibilities of the coordinator and the partners** related to the **implementation of the project and the reporting obligations**. The combination of **practical presentations** and **hands-on tips and stories** will introduce all the aspects you need to know, from Grant Agreement preparation to the distribution of the final payment.

Topics covered:

- The tasks and responsibilities of the coordinator and partners during project implementation.
- The first important deliverables, the Data Management Plan and the Plan for Exploitation and Dissemination of Results and how they are structured, what inputs are needed, what aspects need to be considered.
- A practical guide to the open science requirements. What does the EC expect?
- From results to impact: Innovation management, exploitation, dissemination and communication in Horizon Europe. How can the project result be exploited, non-profit and for-profit exploitation opportunities? How can we get the results to our target groups? What free tools provided by the EC are available to us?
- Project Handbook and practical tools to enable you to efficiently deliver your project results.
- Step-by step introduction to the Horizon Europe Continuous Reporting.

- Periodic technical and financial reporting from A-Z: Who is responsible for what? How can the periodic reporting process be coordinated effectively? What are the typical errors in periodic reporting? How to avoid these errors
- Management and reporting of lump sum projects behind the scenes: is it really that simple?

Dissemination, Exploitation and Innovation in Horizon Europe proposals and running projects, 1-day

This 1-day course will **provide practical insight and advanced tips for writing and managing result-focused exploitation, dissemination and communication actions, including IP issues** under Horizon Europe. It is built on our **direct, hands-on experience** gained in developing and managing Horizon Europe projects. The trainers of Europa Media are actual project managers, coordinators and financial administrators, **currently running seven Horizon Europe** – **one as coordinator – while also preparing proposals to submit** under the open and forthcoming calls of Horizon Europe. This course is designed based on this direct experience and is therefore **100% practice driven.**

In this course, you will learn how results can lead to impact. How to use this approach in proposal writing and in project management. So, we will discuss the measures that can maximise your impact – including exploitation, IPR management, dissemination and communication. The short strategy and the principles will be in the proposal with challenging target KPIs. The long strategy must be developed and implemented when the project is launched. Implementation is very much about proper monitoring and reporting actions. The combination of practical presentations and hands-on tips and stories will introduce all the aspects you need to know.

How do we know this? Fun fact about Europa Media: in almost all our projects we are responsible for dissemination, exploitation actions, including communication. So, we've been there, done that and now we're going to share all our practical knowledge with you.

Topics covered:

- How to write the 2.2 section and develop a short PEDR strategy?
- How to handle open science approaches in section 1.2 of the proposal?
- How to follow IP development, capture and manage results?
- How to support your KIP with the dissemination strategy?
- How to monitor the implementation of your PEDR and the target KPIs? How to report your achievements?
- How will the EU assess during evaluation or implementation your measures to maximise impact?

Master of Horizon Europe Proposal Writing Focus: Impact, 2-days

The course gives a deep insight into proposal development in Horizon Europe (work programmes, calls and topics, submission process etc., general principles and features of Horizon Europe proposals, different project types, and proposal preparation). During the course you will be guided through the process from idea to proposal in a practical workshop exercise. The course also focuses on the expected impact, innovation, and exploitation of project results, and also how to tailor an effective dissemination and communication plan to maximise the potential impact of your Horizon Europe project.

Topics covered:
- How to make sure your proposal fully matches the call text: call analysis, proposal design, consortium composition, cross-cutting issues
- Key features of a successful Horizon Europe proposal – understand the elements that will make your proposal stand out amongst others
- From proposal concept to full proposal: proposal writing from the coordinator's and partner's perspective
- How to compose text and fill in the application forms: practical tips, examples and ready-to-use templates for Excellence, Impact and Implementation
- Key steps and success criteria for winning Horizon Europe proposals: how to finalise and polish your proposal before submission
- Evaluation of horizontal aspects: how to address gender, ethics, SSH and interdisciplinary aspects of your proposal
- Special focus: lump sum proposals – how to design the work plan and resources in lump sum grants

Project Management and Reporting in Horizon 2020 & Horizon Europe, 2-days

This is a 2-day practice-heavy hands-on course that will assist you in gaining a **comprehensive understanding of the financial rules, project management and reporting protocols of the Horizon Europe and Horizon 2020 programs** and their practical application in day-to-day operations.

During the 2-day program of **Project management and Financial Reporting**, you will learn all about the **project management duties and practices** and gain in-depth understanding of the **financial rules and reporting protocols of Horizon Europe and Horizon 2020**. The combination of **practical presentations and the hands-on workshop on personnel cost calculation** will introduce **all the aspects you need to know**, from preparing your Consortium Agreement and Grant Agreement to submitting your last Periodic Technical and Financial report.

Please note that this part of the course is not recommended for beginners with no experience in Horizon 2020 and/or Horizon Europe.

Topics covered:

- How to prepare a project management driven Consortium agreement?
- Detailed discussion about result ownership and access rights in the CA;
- How is innovation management linked to the daily management and the reporting activities?
- How to follow IP development, capture and manage results; assess novelty elements and how to decide on the best exploitation route.
- Practice-based tips on how to build and what exactly to include into your PEDR - Plan for Exploitation and Dissemination of Results including Communication activities?
- Deep dive into EC services to boost your dissemination and exploitation efforts.
- Step-by step introduction to the Horizon Europe Continuous Reporting tool
- When and how the internal reporting should be completed to be able to identify "problems".
- Periodic technical and financial reporting from A-Z
- Step-by-step analysis of the different personnel cost calculation protocols in H2020, compared to the all-new approach in the Horizon Europe program.

- How to deal with parallel running H2020/HE projects when the reporting requirements are quite different? Should you change the time-recording protocols?
- Why record time in hours if HE apparently has daily rates?
- What is a day-equivalent, and what to do when one works part-time or on sick/parental leave?
- How to optimize efforts, handle budget deviations, and monitor spending in reality?
- How to harmonize national accounting protocols with the H2020/HE Grant Agreement articles?
- Internal cost calculation – how to make internal costs measurable, eligible for EC auditors, and still maintain sanity?
- Financial management of lump sum projects behind the scenes: is it really that simple? What if you have both a lump sum and an action grant project?
- ...and many more!

Horizon Europe Proposal Writing - The Fundamentals, 3-days

This comprehensive 3-day course will provide you with an understanding of how to find the right call, adequate partners, how to attract them with a good concept note, and what are the key steps in proposal submission. In addition, we will learn about budgeting in the case of both actual cost and lump sum grants. Finally, we will take on the role of the evaluators to understand their point of view, making it easier to see what they will pay attention to when they look at our future proposals. All three days will have interactive, hands-on exercises, sealing in the theoretical knowledge we offer on these topics.

Day 1: Submitting competitive proposals under Horizon Europe

The goal of the first day is to provide you with a clear understanding of the features of winning Horizon Europe proposals and the confidence to develop and submit Horizon Europe proposals when you go back home. You will learn about the consortium-building process, how to find partners, how to jump into a consortium with a value proposition, and how to maintain networks. We will also introduce from A to Z how a Horizon Europe proposal is conceived, registered, developed and submitted with its administrative and technical parts. In the afternoon, we will practice together the first steps of proposal conception to give you the initial momentum and to get it right.

Day 2: Budgeting of Horizon Europe projects

The second day aims to provide essential knowledge of finances in Horizon Europe as well as the skills to build a sound budget for your next Horizon Europe proposal. We will introduce all the basic financial rules of Horizon Europe with an emphasis on the major cost categories: Personnel, Subcontracting, Purchase costs, Overheads. After that, we will go into the practical steps of putting together a proposal budget, comparing budget-based action grants and lump-sum grants. In the afternoon, you will test yourself and build a real Horizon Europe budget on our Excel template, estimating personnel costs, planning travel costs, and making sure you have accurately calculated costs for equipment and consumables.

Day 3: Evaluation of Horizon Europe proposals

You will become an evaluator and experience first-hand the evaluation process to better understand this critical stage of the selection process in Horizon Europe and conceive your proposals in this light in the future. This simulation exercise begins with the briefing of the evaluators on the "call for proposals" and the rules and procedures of the evaluation process. The

evaluators will then conduct their individual assessment of the HE proposals, after which they will gather with their fellow evaluators for consensus meetings. Once the consensus reports are drafted in each panel, final ranking will be established, which will serve as the basis for the allocation of budget amongst the highly ranked proposals.

Master of Project Management and Reporting in Horizon 2020 & Horizon Europe, 3-days

The Master of Project Management and Reporting in Horizon 2020 & Horizon Europe is a 3-day practice-heavy, hands-on course that will assist you in gaining a **comprehensive understanding of project management, reporting protocols and personnel cost calculation under Horizon Europe and Horizon 2020** and their practical application in day-to-day operations. It is built on our **direct, hands-on experience** gained in developing and managing EU research and innovation projects over the past 20 years. The trainers of Europa Media are project managers, coordinators and financial administrators, **currently running seven Horizon Europe projects – one as coordinator – meaning submitting periodic reports, managing GA changes and preparing financial statements** under these Horizon Europe and many more H2020 grants. This course is designed based on this direct experience and is, therefore **100% practice driven.**

During the 3-day program, you will learn all about the **project management duties and practices** and gain an in-depth understanding of the **personnel cost related financial rules and reporting protocols of Horizon Europe and Horizon 2020**. The combination of **practical presentations, the hands-on workshop on personnel cost calculation and the project management and financial scenarios** will introduce **all the aspects you need to know**, from preparing your Consortium Agreement and Grant Agreement to submitting your last Periodic Technical and Financial report.

With this training, you will be equipped with the tools, knowledge, and skills you need to effectively manage complex research projects and will be able to deliver high-quality results with confidence.

Topics covered:

- How to prepare a project management driven Consortium agreement? Detailed discussion about result ownership and access rights in the CA;

- How is innovation management linked to the daily management and the reporting activities?
- How to follow IP development, capture and manage results; assess novelty elements and how to decide on the best exploitation route.
- Deep dive into EC services to boost your dissemination and exploitation efforts.
- Practice-based tips on how to build and what exactly to include into your PEDR- Plan for Exploitation and Dissemination of Results including Communication activities?
- Practical tools will enable you to efficiently deliver your project results.

- Step-by step introduction to the Horizon Europe Continuous Reporting tool
- Lump sum versus cost reporting in Horizon Europe – Differences you need to be aware of.
- Step-by-step analysis of the different personnel cost calculation protocols in H2020, compared to the all-new approach in the Horizon Europe program.

- How to deal with parallel running H2020/HE projects when the reporting requirements are quite different? Should you change the time-recording protocols?

- Why record time in hours if HE apparently has daily rates?
- What is a day-equivalent, and what to do when one works part-time or on sick/parental leave?
- How to optimize efforts, handle budget deviations, and monitor spending in reality?
- How to harmonize national accounting protocols with the H2020/HE Grant Agreement articles?
- Periodic technical and financial reporting from A-Z
- Financial management of lump sum projects behind the scenes: is it really that simple? What if you have both a lump sum and an action grant project?
- ...and many more!

Horizon Europe/H2020 Master of Finance and EC Audits, 3-days

This **3-day exclusive training course** will assist you in gaining a comprehensive understanding of the financial regulations and reporting protocols of the Horizon Europe and Horizon 2020 programs and their practical application in day-to-day operations. Distinctions between Horizon Europe and H2020 will be emphasized, as well as their impact on internal record-keeping, planning, and bookkeeping.

Special attention will be given to the complexities of personnel cost calculation, such as daily rates, inconsistent rules, and the GA and Annotated GA descriptions. Additionally, the course will focus on internal invoicing and the calculation of research facility costs.

Agenda and topics covered:

Day 1 - *Hands-on Introduction to Horizon Europe and Horizon 2020 Financial Rules*

Attend a full-day presentation on the financial rules and reporting protocols of HE and H2020, highlighting the changes and their effects on day-to-day project management. The presentation will include numerous examples, calculations, and scenarios to help attendees understand the importance of these rules, from basic eligibility conditions to changes in personnel cost calculations and the new research facility cost criterion.

Prepare yourself, as this will be the most challenging day of the course!

Day 2 - *Workshop: Learning by Doing with Horizon Europe and Horizon 2020 Cost Reporting*

In the morning, participate in the renowned and unique workshop of Europa Media. Attendees will receive a package of timesheets, salary slips, invoices, contracts, per-diem certificates, and mission reports for a virtual HE/H2020 project. They will then have to calculate the eligible costs and submit a financial statement with comparisons to H2020 fully integrated.

In the afternoon, the group will review the most optimal solutions from the workshop exercise, delving into issues such as timesheets, personnel cost calculations, other services versus subcontracting, unforeseen costs, and deviations from the budget.

Day 3 - *Workshop: Becoming an EC Auditor for a Day*

Many of us are intimidated by financial audits, particularly level-2 audits conducted by EC(-appointed) auditors. Did you know that one way to overcome this fear is to try to see things from the "other" side?

In the morning, attendees will be divided into groups of 4-5 and receive full-project documentation (invoices, reports, timesheets, contracts, etc.). They will act as a group of auditors, recalculating the reported costs and identifying deviations, errors, and misclaimed amounts. It's much more fun to find the errors than to make them! This will also be a competition to see which group finds the most hidden things.

In the afternoon, we will assess and discuss what should have been discovered, accepted, and/or rejected, and learn about how real-life audits are conducted, what to expect from the auditors, how to prepare, and what to do if different audits have different conclusions on the same things. This will cover the full finance cycle from budgeting to audits in just 3 days!

Hottest topics covered by the course:

- Step-by-step analysis of the different personnel cost calculation protocols in H2020, compared to the new Horizon Europe program.
- How to deal with parallel running H2020/HE projects when the reporting requirements are quite different? Should you change the time-recording protocols?
- Why record time in hours if HE apparently has daily rates?

- What is a day-equivalent, and what to do when one works part-time or on sick/parental leave?
- How to optimize efforts, handle budget deviations, and monitor spending in reality?
- How to harmonize national accounting protocols with the H2020/HE Grant Agreement articles?
- Advantages and disadvantages of actual and unit-based personnel costs calculations?
- Internal cost calculation – how to make internal costs measurable, eligible for EC auditors, and still maintain sanity?

- ...and many more!