Horizon Europe Academy

18-21 October 2022 – Brussels, Belgium

Horizon Europe

- **Proposal Writing**
- **Project Management from Project Managers**

Horizon Europe Proposal Writing

AGENDA

DAY 1
18th October

08:45 – 09:00	**Arrival and registration**
09:00 – 09:30	**Event opening and introduction to the course**
09:30 – 10:15	**Introduction to Proposal Development under Horizon Europe**

Ömer Ceylan, Managing Director, Geonardo

Work programmes, calls and topics – budgets, deadlines, submission processes
- General principles and features of HE proposals – understanding and tailoring your proposal 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

(10:15 – 10:30 Coffee break)

10:30 – 11:15 **From idea to Horizon Europe proposal – A hands-on approach (Part 1) (Part 1)**

Ömer Ceylan
- How to turn your novel idea into a winning concept;
- Drafting the Part A and Part B of the proposal;
- Excellence – Examples, tips and templates from section 1.1. and 1.2 of the Part B of the proposal with lessons learned from evaluations

(11:15 – 11:30 Break)

11:15 – 12:00 **From idea to Horizon Europe proposal – A hands-on approach (Part 2) (Part 2)**
- Implementation – Examples, tips and templates from section 3.1. and 3.2 of the Part B of the proposal with lessons learned from evaluations;
- How to develop a sound work plan, and consortium as a whole considerations

(12:15 – 13:00 Lunch break)

13:00 – 16:00 **Proposal Development Workshop: Call analysis, Objectives, Work plan**

Participants are divided into small groups to practice the first steps of proposal development under Horizon Europe:
- Call analysis;
- Consortium building considerations;
- Proposal objectives and SMART considerations;
- How to distinguish activities from objectives and vice-versa;
- Work packages and deliverables;
- PERT diagram and milestones;

(14:30 – 14:45 Coffee break)

16:00 **Wrap-up and end of first day**

09:00 – 10:00   **Expected Impact in Horizon Europe Proposals**
Ömer Ceylan

- Impact in HE 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

(10:00 – 10:15 Coffee break)

10:15 – 11:00   **Impact, Innovation and Exploitation in Horizon Europe proposals**
Ömer Ceylan

- How to identify and select the best exploitation, IP and innovation strategy to maximise the potential impact of your HE 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

(11:00 – 11:15 Break)

11:15 – 12:00   **Dissemination & Communication in Horizon Europe proposals**
Ömer Ceylan

- How to tailor an effective dissemination and communication plan to maximise the potential impact of your HE project;
- Tools, measures, strategies and channels to reach your target group and communicate the right message in the right way;
- Policy feedback and the impact canvas (2.3);
- New requirements of the EC, legal obligations according to the HE GA

(12:00 – 12:45 Lunch break)

12:45 – 15:00   **Proposal Development Workshop: Impact, Exploitation, Dissemination & Communication**

- How the project will contribute to each of the expected outcomes and impact mentioned in the work programme;
- Exploitable results and the potential exploitation strategies – how to transform this into a "plan";
- Defining the most appropriate target groups. tools and channels for dissemination and communication

(13:45 – 14:00 Break)

15:00   **Wrap-up and end of the second day**

Horizon Europe Project Management

AGENDA   DAY 3

20th October

08:30 – 09:00   **Arrival of participants**

09:00 – 09:30   **Event Opening and introduction to the course**

09:30 – 10:45   **The legal obligations – from the GA to the CA**

Krisztina Toth, Managing Director, Europa Media Innovations

Understanding your obligations coming from the Grant Agreement and the Consortium Agreement is essential. This presentation will introduce those articles of the GA and sections of the CA from the project management perspective that need to be considered the most during the implementation of your projects: such as financial clauses, budget distribution and management, dealing with defaulting parties, ownership of the results, access rights, IPR issues etc.

(10:45 – 11:00 Coffee Break)

11:00 – 12:30   **Data management plan, PEDR and Open science**

This presentation provides a comprehensive overview of the two key deliverables of the first phase of the project: Data Management Plan (DMP) and the Plan for Dissemination Exploitation of the Results including Communication (PEDR). We will present the EC rules for preparing the data management plan and give examples of good practices for the preparation of the PEDR. During the session, we will also discuss in detail the Open Science: obligations and the open science practices. Research Data Management practices. EU support for Open Access. Brief introduction to OpenAIRE, Open Research Europe, European Open Science Cloud.

(12:30 – 13:30 Lunch break)

13:30 – 14:30   **Innovation management in Horizon Europe: IP and Exploitation**

Introduction to the innovation management activities in Horizon Europe projects including best practices to make the most out of your project results. How to follow IP development, capture and manage results? Assess novelty element and innovation deployment potential. Exploitation routs – what suits the best? How to protect your IP? Deep dive into the EC services to boost your exploitation efforts.

(14:30– 14:45 Short break)

14:45 – 16:00   **Reporting from A to Z: Continuous reporting**

In this session, we will introduce the responsibilities of the partners and the coordinator in the Horizon Europe Continuous Reporting. Powerful templates and tools for coordinators to collect the necessary data for the Continuous reporting. Detailed step-by-step introduction to the Continuous reporting function of the Funding and Tenders Portal.

9:00 – 10:30   **Reporting from A to Z: Internal reporting**

Internal reporting: What is internal reporting? How to make the internal reporting mandatory? When and how the internal reporting should be completed to be able to identify "problems".

Workshop: Typical mistakes in the financial report

Participants will analyse an internal financial report to find typical errors and calculation mistakes.

(10:30 – 10:45 Coffee Break)

10:45 – 12:30   **Reporting from A to Z: Periodic Report: Technical and financial report**

Detailed introduction on how to prepare the H2020 periodic technical and financial reports: what to and how to report, irregularities and deviation management, internal quality assurance, tips and tools for effective internal management of your partners and their reporting obligations. Introduction to novelties of Horizon Europe Periodic Reporting.

EU assessment of the periodic report: typical mistakes in the periodic report. Showcase of a real periodic, suspension of the payment deadline letters.

(12:30 – 13:30 Lunch Break)

13:30 – 14:30   **Reporting from A to Z: Last Periodic Report, Project Closure,   and the Review Meeting**

What we have to do differently in the last reporting period? How shall we distribute the balance payment and the amount from the Guarantee Fund / Mutual Insurance Mechanics? How to get prepared for the Review meeting?

(14:30 – 14:45 Technical break)

14:45 – 16:00   **Project Management case studies and scenarios**

Let's see how we can put into practice what we have learned over the past two days. In the last part of the training, we will go through various project management cases that have happened in our own projects. Together we will go through the scenarios and discuss how to deal with such situation and what tools we have at our disposal as a partner or as a coordinator. Get ready for advanced scenarios!

End of the Academy