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TURKEY<sup>in</sup>  
**HORIZON 2020**  
COOPERATION. INNOVATION. COMPETITIVENESS

Technical Assistance for Turkey in Horizon 2020 Phase-II

EuropeAid/139098/IH/SER/TR

# Turkey in Horizon 2020 II

3rd Information Multipliers Training (Workshop) – Project  
Management in Horizon 2020

Management of H2020 projects from Kick-Off to Closure

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Ankara, 22/01/2020



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# Main aims of the session

1

To present basic principles of the role, attitude and ethos of a person who is involved in managing H2020 projects

2

To guide participants through the 5 aspects of H2020 project management

3

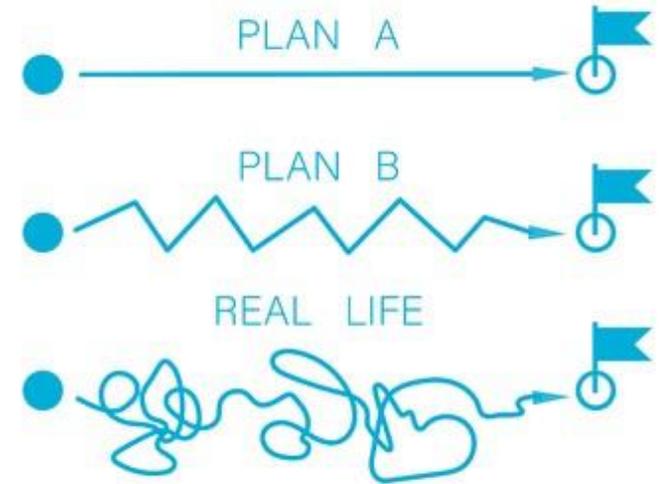
To provide participants with a solid framework for managing relationships with EC



# Planning Vs Implementation

“EVERYBODY HAS A PLAN UNTIL  
THEY GET  
PUNCHED  
IN THE FACE”

~ MIKE TYSON



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# Basics



## TEAM WORK



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# 10 CHARACTERISTICS of a GOOD PROJECT MANAGER

Finding a good project manager is a rarity. If you know one or are lucky enough to work for one, watch carefully to see these characteristics in their practice and character.

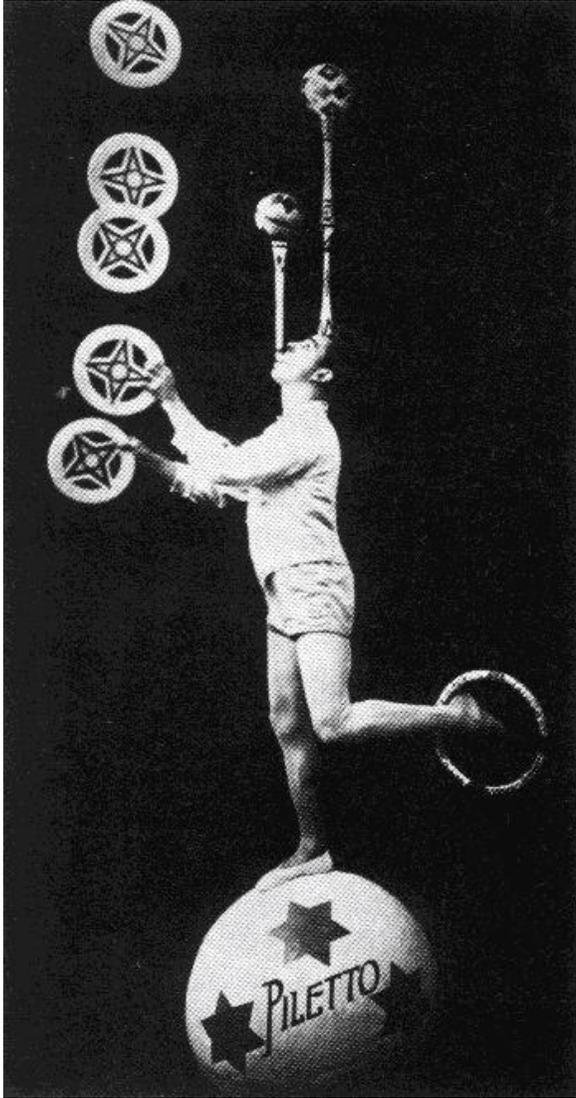
- INSPIRE**  
Be sure to lead by example. When you work in a certain way, it motivates those around you to perform at the same level.
- FOSTER GOOD RELATIONS**  
Being able to handle a multitude of people and personalities is at the crux of being a good project manager. A strong project manager knows when to bite his tongue, give feedback and when to treat everyone to pizzas.
- ANTICIPATE NEEDS**  
It is the PM's responsibility to make sure people have what they need to bring out the best in them. Nip possible issues in the bud.
- BE DRIVEN**  
Quality results require quality input. A good project manager does what it takes to ensure that things are done, done well and done on time.
- ANTICIPATE PROBLEMS**  
Think in 3s: 3 steps, 3 days, 3 weeks into the future and foresee problems that might turn up and then avoid or divert them.
- MINIMIZE MEETINGS**  
Devote more time to 'doing' and less time to 'talking about doing'. Trust that your team is capable and do not micromanage.
- DELEGATE FIRMLY**  
Being a good delegator requires you to be aware of those around you and so give the right task to the right person. Test people's strengths and allow them to grow by taking action.
- GOES IN WITH A PLAN**  
Good PMs know that planning is required for EVERYTHING and even if the plan isn't followed precisely, it is still important to have something to fall back on.
- FOCUS ON SOLUTIONS**  
Being solution-oriented requires that you do not waste time playing the blame game but actually solving the problem at hand. Be positive and get things done!
- DON'T COMPLAIN**  
Use positive language to deal with tough situations and try to move forwards at all times. Take the past as a lesson that will improve future outcomes.

Learn how to apply your good project management skills to grow as a professional.

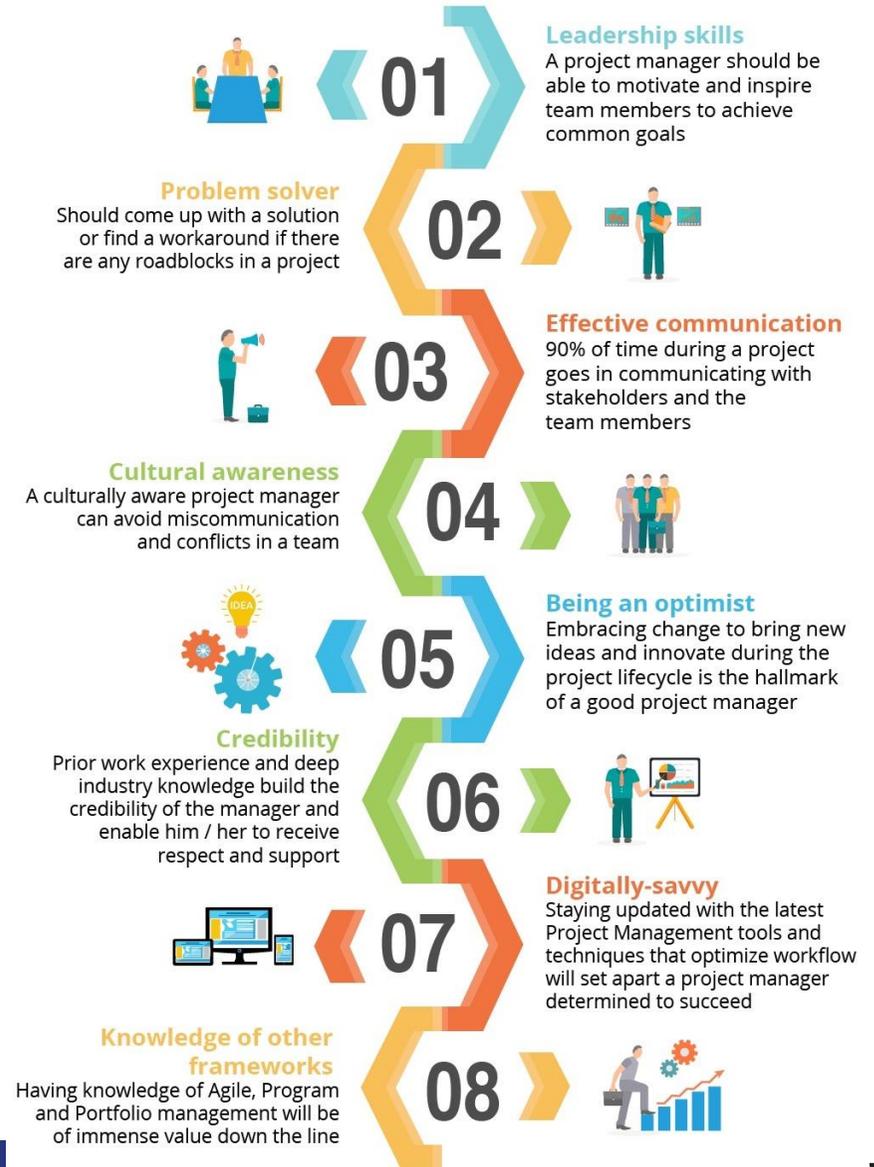


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# Basics



## 8 Key Values of Project Managers



# Basics



## 15 Project Management Terms you Should Know

Project management profession which is the most sought after profession in the whole world has a huge knowledge base. In fact, there are multiple project management methodologies that enterprises rely on to complete the projects in a successful manner. Project management approaches such as the PMBOK®, PRINCE2, Agile, Kanban etc have certain project management terms that every project manager or project team members should be aware of.

<p>If the project objective is not defined properly, then it becomes difficult for project team members to align themselves to the project. During the project kick-off meeting define the metrics and show them what is that they have to achieve.</p>	<p><b>Objective</b></p>  <p>1</p>	<p><b>Deliverable</b></p>  <p>2</p>
<p>Deliverable is a tangible outcome that is produced by the project in its lifecycle. The project creates internal or external deliverables which is produced as a consequence of executing the project.</p>		
<p><b>Goals</b></p>  <p>3</p>	<p>Project goals provide you the focus required to develop a roadmap to fulfill the project objective. The goals should be SMART (Specific, Measurable, Achievable, Relevant and Time-bound).</p>	
<p><b>Resources</b></p>  <p>4</p>	<p><b>Project Team</b></p>  <p>5</p>	<p>Your project team is the most important resource of all. Select your team based on their individual capabilities with regards to skills and experience to achieve at the highest level.</p>
<p>Get your project resources on board in the form of people, capital, tools, space, time etc. Without proper resource allocation, successful completion of projects is a difficult prospect.</p>		
<p><b>Decisions</b></p>  <p>6</p>		
<p>There should be transparency about decision making in a project. Be clear about who can take what decisions which needs to be vetted by the project committee to take quick decisions.</p>		

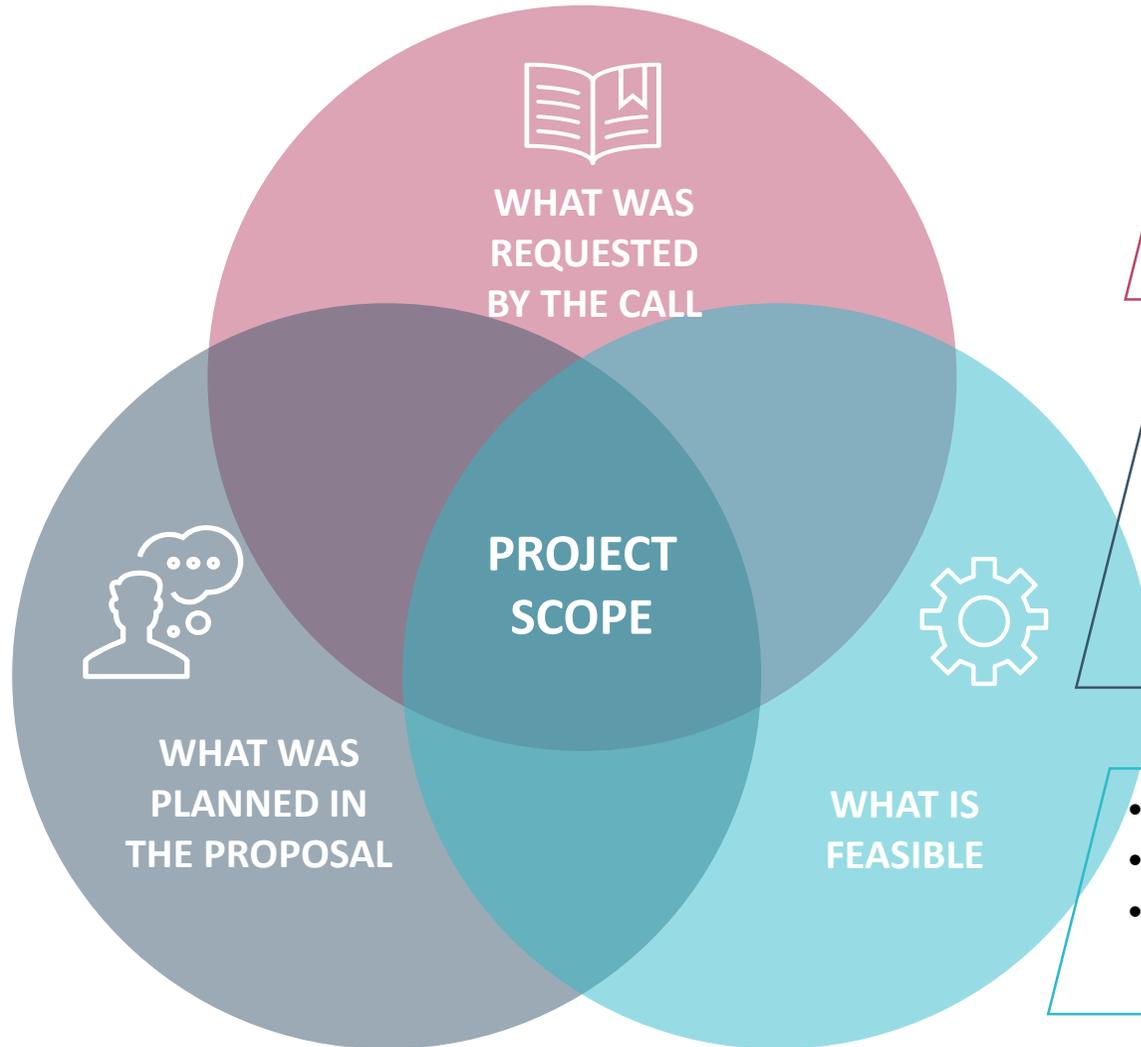
<p>Analyze a situation from different angles and encourage your project team to find multiple solutions and choose the best. Initiate a healthy debate to explore new opportunities and to make an informed decision.</p>	<p><b>Debates</b></p>  <p>7</p>	<p><b>Deadline</b></p>  <p>8</p>
<p>Time is one the most critical resources in your project, your team should adhere to the project deadlines to complete. If time is wasted it will eat up more resources to complete the same work.</p>		
<p><b>Explore</b></p>  <p>9</p>	<p>Explore new avenues and every option available. Understand the advantages and disadvantages, and come up with the best possible project plan that adds the most value for both customer and the enterprise.</p>	
<p><b>Constraints</b></p>  <p>10</p>	<p><b>Priorities</b></p>  <p>11</p>	<p>Analyze a situation from different angles and encourage your project team to find multiple solutions and choose the best. Initiate a healthy debate to explore new opportunities and to make an informed decision.</p>
<p>Constraints are something that is outside the control of the project and need to be managed effectively. Resource constraints may arise in the middle of the project when the dates / timelines get stretched.</p>		
<p><b>Milestones</b></p>  <p>12</p>		
<p>Milestones are related to schedules which signify completion of a major project deliverable. In fact, it is used as a project checkpoint to validate how the project is progressing.</p>		
<p><b>Red Flags</b></p>  <p>13</p>	<p><b>Accountability</b></p>  <p>14</p>	<p><b>Critical Path</b></p>  <p>15</p>
<p>Enterprise should create an environment where employees raise issues if there is something wrong in the project. Project teams should come together to solve problems and give their real and unbiased opinions.</p>	<p>In the end, project team members who are accountable for their work is what gets the project completed. Teams can share their workload, but individuals in a project team are responsible for getting their tasks completed.</p>	<p>The term critical path refers to the longest duration path through the work plan. If an activity gets delayed in the critical path by couple of days, the entire project gets delayed by couple of days. So make sure you identify the critical path throughout the project lifecycle.</p>



# H2020: 5 aspects of project management



# Scope: Scope Definition



INNOSUP 1 Call: Proposals should support innovation activities and/or channel a mix of different targeted entrepreneurial and innovation support measures.

PARSEC aims at providing SMEs with access to market support, through a dedicated matchmaking facility, a set of trainings and an investment readiness programme.

- Matchmaking facility to be delivered by June 1<sup>st</sup>
- 4 trainings in Q4 of 2020
- Investment readiness program syllabus by 31.12 2020



# Scope: Assumptions and constraints

## *Assumptions*

---

An assumption is something that is believed to be true based on our knowledge, experience, and information provided by our team members.



## *Constraints*



Project constraints are anything that restricts or dictates the actions of the project team such as the limitation of cost, schedule, resources.

**EXAMPLE from PARSEC:**

**Assumption: At least 350 SMEs/ startups will apply for funding**

**Constraint: The available budget allows the evaluation of maximum 700 proposals**



# Scope: Stakeholders

STAKEHOLDER	INTERESTS	INFLUENCE	NEEDS
 <p><b>European Commission</b> (Project Officer, Policy Officers, Officers of Agencies in charge of project etc)</p>	 <ul style="list-style-type: none"> <li>• Delivery of project results (on time, on specs, on budget)</li> <li>• Broader policy objectives</li> <li>• Promotion of EC contribution</li> <li>• Protection of taxpayers' interests</li> </ul>	 <p><b>HUGE</b> (Consider them as the ultimate customer)</p>	 <ul style="list-style-type: none"> <li>• Credible information</li> <li>• Compliance with procedures</li> <li>• Promotion of results</li> </ul>
<p><b>Partners</b> (Project team, other employees of partners' organizations, hierarchy, administration)</p>	<ul style="list-style-type: none"> <li>• Maximizing benefit for organization</li> <li>• Maybe conflicting, even internally</li> <li>• New projects</li> </ul>	<p><b>BIG</b> (Keep everyone across the hierarchy happy, they are the ones you expect to deliver)</p>	<ul style="list-style-type: none"> <li>• Sound project management</li> <li>• Highlight of their role</li> <li>• Avoid unexpected costs and financial losses</li> <li>• Simplicity in procedures</li> </ul>
<p><b>Other external stakeholders</b> (Private companies, public authorities, associations, NGOs, media etc)</p>	<ul style="list-style-type: none"> <li>• Project results</li> <li>• Opportunities to participate</li> <li>• Possibilities to influence European policy making</li> </ul>	<p><b>MODERATE</b> (They do not make decisions however their opinion can influence EC)</p>	<ul style="list-style-type: none"> <li>• Impact</li> <li>• Digestible information</li> <li>• Networking opportunities</li> </ul>

# Scope: Exploitation and Sustainability



## PROJECT RESULTS:

Beneficiaries have the obligation to define the expected results and their strategy for exploitation and dissemination.



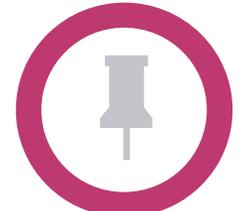
**Dissemination:** Means through which research results are presented to the public.

**Exploitation:** Utilisation (direct/indirect) of results in research activities, which are not part of the project, as well as utilisation for further development, creation and marketing of a product or process.

**Valorization:** Use, for socio-economic purposes, of the results of research financed by public authorities. Society's direct and indirect ROI.



# Scope: Exploitation Plan



## Outcomes

- Prototype
- Product
- Service
- Software
- Methodology
- Documents

## TRLs

- TRL3 – TRL4 - Applied Research – **Long Time to Market**
- TRL5 - TRL6 – TRL7 - Pilot Industrial Scale – **Medium time to Market**
- TRL8 – TRL9 – Manufacturing – **Short Time to Market**

## IPR

- Patent
- Trademark
- Utility Model
- Copyright
- NDA – Non Disclosure Agreement
- Industrial Design

## Commercialization

### Channels

- Consultancy
- Licencing
- Spin-off
- Assignment
- Joint-Venture Agreement

## Target

### Groups

- Associations
- Public Bodies
- Private Companies
- End Consumers
- ...



# Scope: Exploitation Plan

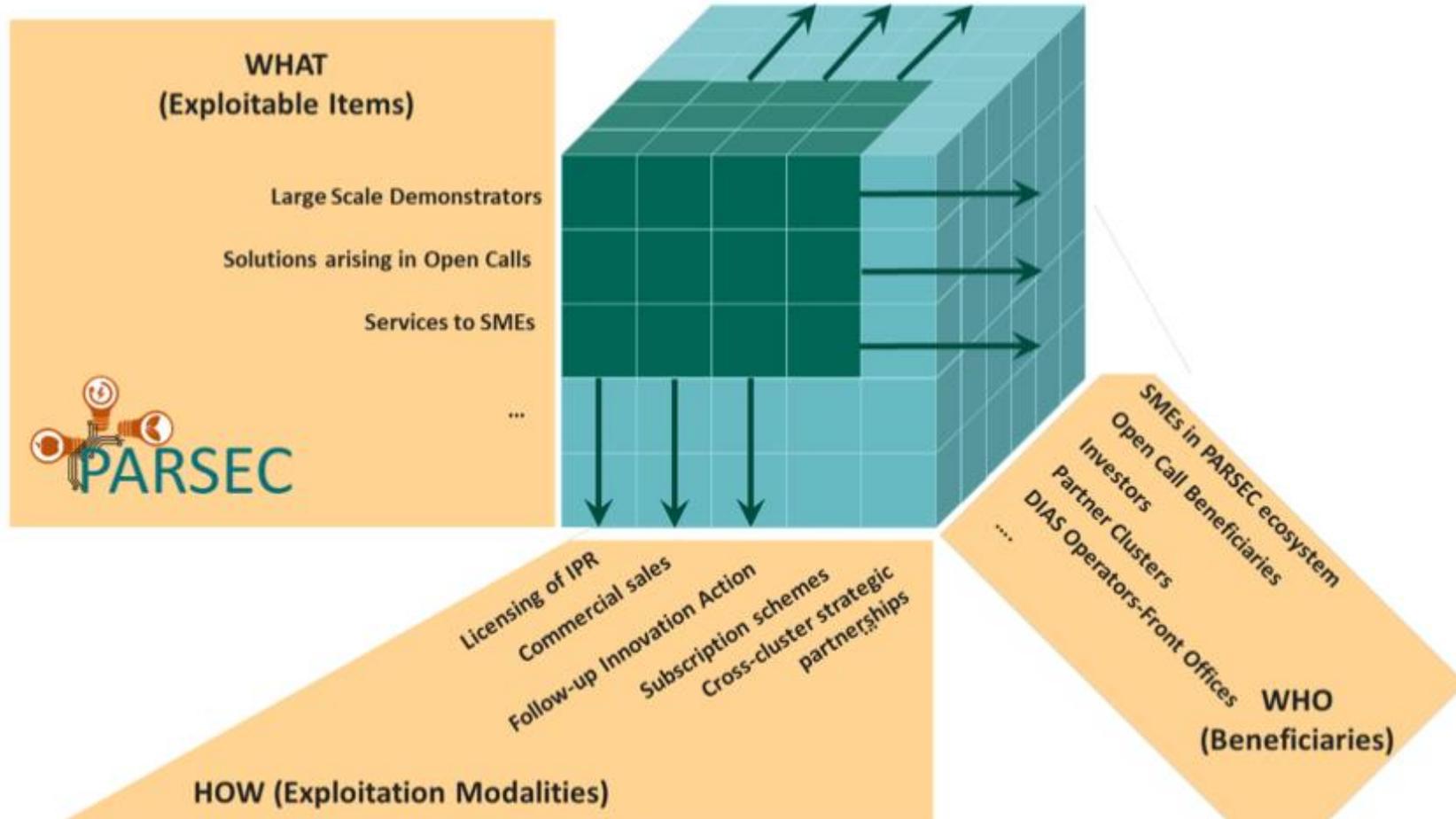
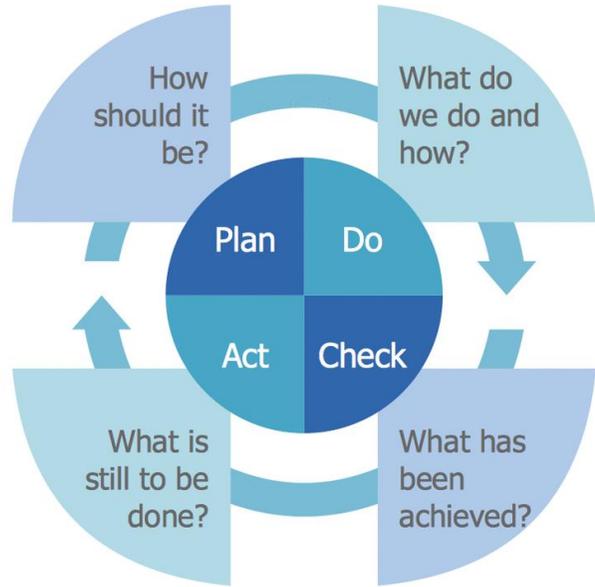
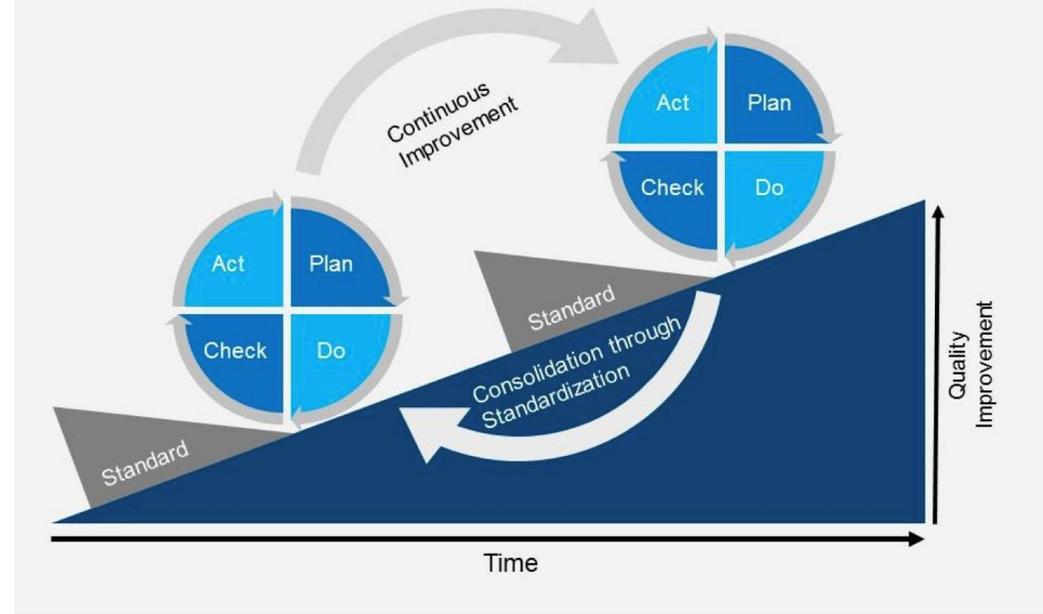


Figure 9: PARSEC exploitation cube

# Quality Management: Basic Principles



PDCA Process Chart Continuous Improvement Cycle



## Why QM is needed in projects:

- To secure homogeneity
- To improve quality
- To avoid mistakes



# Quality Management in H2020 projects

## QUALITY MANAGEMENT PLAN



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## QUALITY MANAGER



- Elaborates and monitors the implementation of the project **Quality Management Plan**
- Supports the **evolution of the work-plan** and advises Project Coordinator about the monitoring of activities and the allocation of project resources;
- Supports Project Coordinator by monitoring the quality of all project **deliverables**.



# Quality Management: Data Management Plan

## ANALYSING DATA:

interpreting, & deriving data, producing outputs, authoring publications, preparing for sharing

**PRESERVING DATA:** data storage, back- up & archiving, migrating to best format & medium, creating metadata and documentation

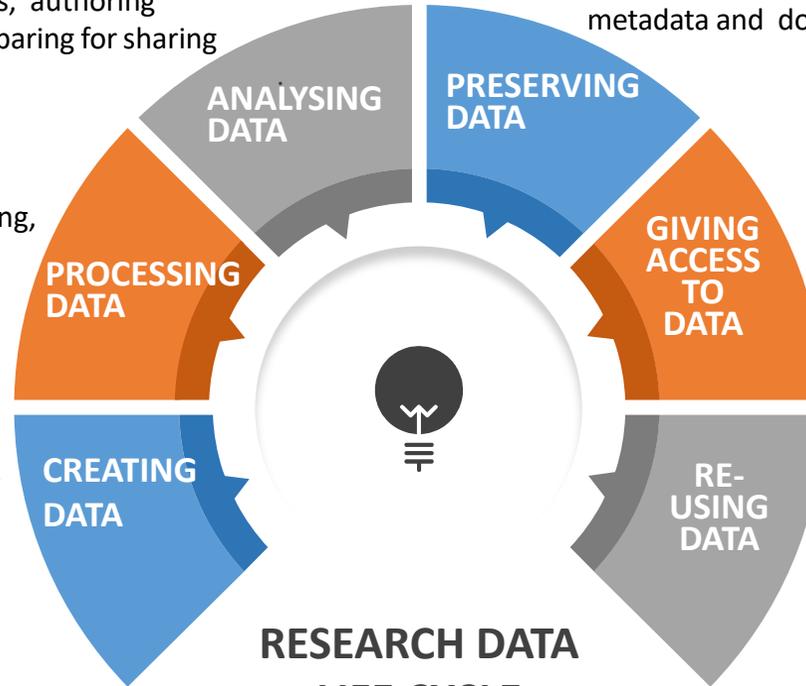
## PROCESSING DATA:

entering, transcribing, checking, validating and cleaning data, anonymising data, describing data, manage and store data

## ACCESS TO DATA:

distributing data, sharing data, controlling access, establishing copyright, promoting data

**CREATING DATA:** designing research, DMPs, planning consent, locate existing data, data collection and management, capturing and creating metadata



**RE-USING DATA:** follow- up research, new research, undertake research reviews, scrutinising findings, teaching & learning

**RESEARCH DATA  
LIFE CYCLE**

**F**indable **A**ccessible **I**nteroperable **R**eusable



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# Quality Management: Data Management Plan

*“Data management planning is the process of planning, describing and communicating the activities carried out during the research lifecycle*



- What kinds of data will be created, and how
- How will the data be documented and described?
- Are there ethical or Intellectual Property issues?
- What are the arrangements for data sharing and reuse?
- What is the strategy for longer-term preservation?

# Quality Management: Data Management Plan

Data set reference and name	<i>Identifier for the data set to be produced.</i>
Data set description	<b>Description of the data that will be generated or collected, its origin</b> (in case it is collected), <b>nature and scale and to whom it could be useful, and whether it underpins a scientific publication.</b> Information on the existence (or not) of similar data and the possibilities for integration and reuse.
Standards and metadata	Reference <b>to existing suitable standards of the discipline.</b> If these do not exist, an outline on how and what metadata will be created.
Data sharing	Description of <b>how data will be shared, including access procedures, embargo periods (if any), outlines of technical mechanisms for dissemination and necessary software and other tools for enabling re-use, and definition of whether access will be widely open or restricted to specific groups.</b> Identification of the repository where data will be stored, if already existing and identified, indicating in particular the type of repository (institutional, standard repository for the discipline, etc.).  <i>In case the dataset cannot be shared, the reasons for this should be mentioned (e.g. ethical, rules of personal data, intellectual property, commercial, privacy-related, security-related).</i>
Archiving and preservation	Description of the <b>procedures that will be put in place for long- term preservation of the data.</b> Indication of how long the data should be preserved, what is its approximated end volume, what the associated costs are and how these are planned to be covered.

?



# Effort: Roles and Responsibilities

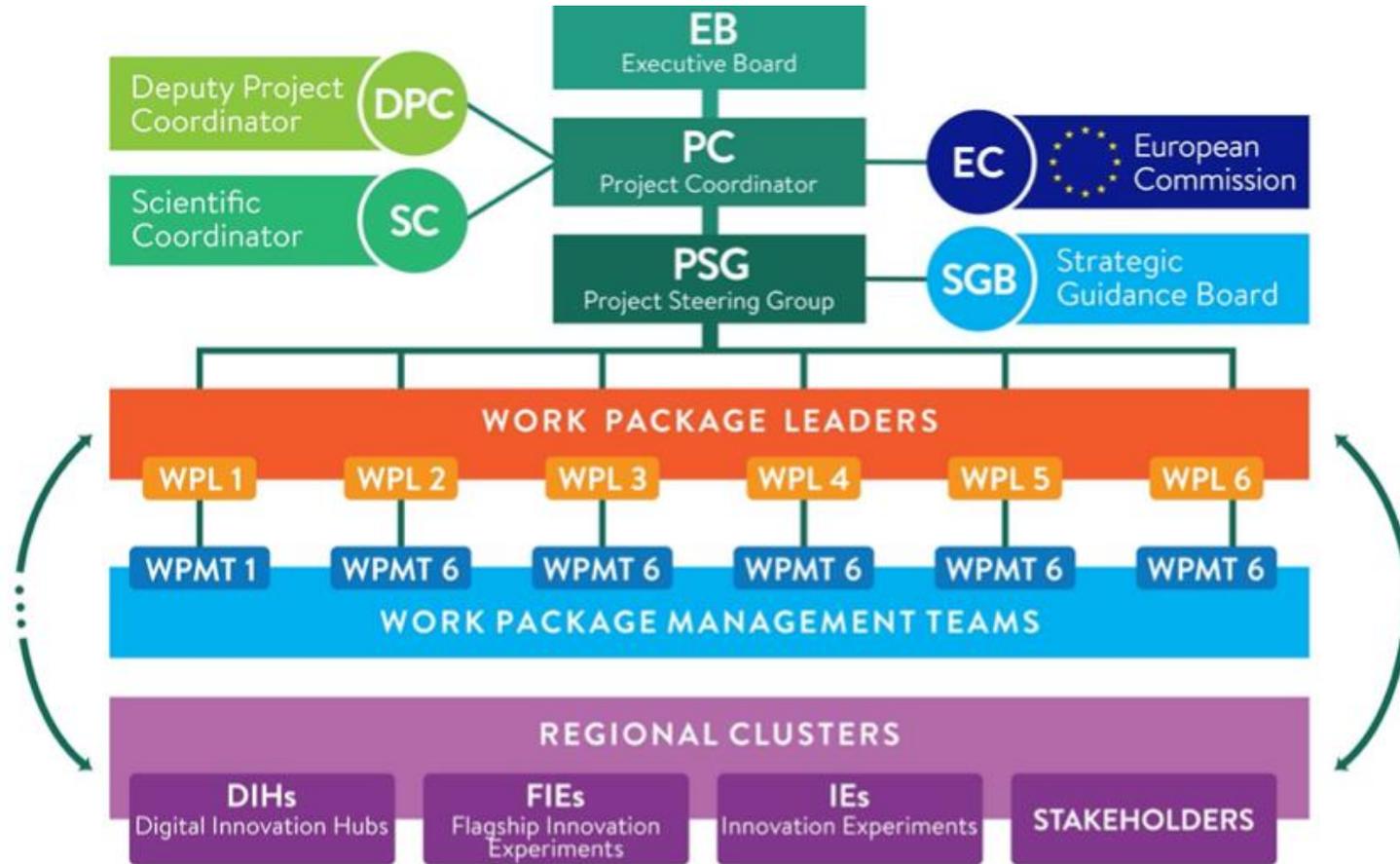


Figure 14: SmartAgriHubs Management structure

- ❑ Each of the project partners can have different roles.
- ❑ Roles are defined in the project work-plan description

# Effort: Roles and Responsibilities

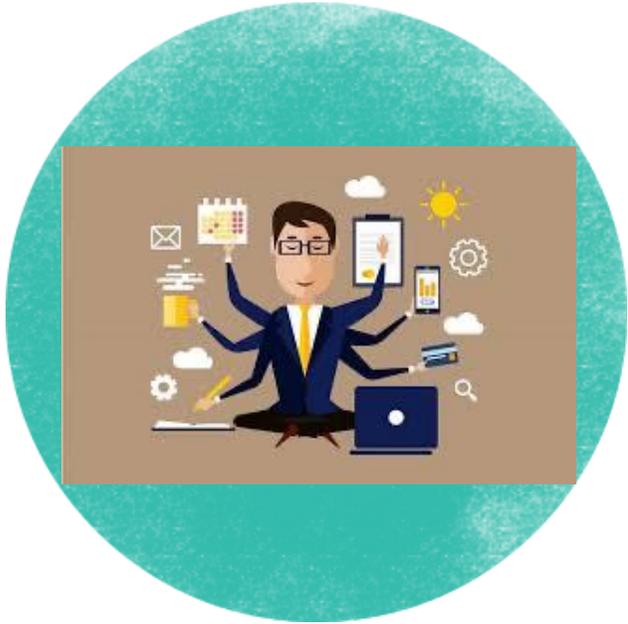
**Main decision-making body:** Executive Board/ General Project Assembly/ Steering Board

- **Who:** all project partners, chaired by the Coordinator, **one partner = one vote**
- **Main tasks:**
  - To review project implementation and **progress of work**
  - To share knowledge on project implementation and to provide **suggestions for its further development**
  - To decide upon **adaptations** of the Annex I and consortium budget
  - In case an activity can not be implemented, making a priority list for the future possible activities and deciding on the option, based on criteria of **efficiency, feasibility, impact and relevance**
  - To tackle **problems**, delays and resolve conflicts



# Effort: Roles and Responsibilities

## *Job description*



## The Coordinator



- **Scientific Coordinator**
- **Administrative and Financial Coordinator**

- Responsible for overall project management
- Intermediary between the project and EC
- Ensures communication with external bodies
- Monitors compliance of the partners with their obligations
- Collects, reviews and submits information on the progress of the project, reports and other deliverables to the EC
- Administers the financial contribution of the EC and fulfills financial tasks
- Transmits on time documents and information connected with the project
- Chairs the EB/PSG meetings, proposes decisions and monitors the implementation of the project



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# Effort: Roles and Responsibilities



## Work package Leaders

*Responsible for the overall coordination of the WP, supervision of the tasks, activities, milestones as well as the related deliverables.*

- preparing a draft periodic plans for the WP tasks to be approved at the EB meetings
- reporting to the coordinator and to EB
- organising communication within the respective WP and, together with the Coordinator and other WP Leaders, across WPs
- presenting the WP conclusions, decisions, results and deliverables at external meetings
- taking, in agreement with the Task Leaders, decisions at the WP level
- analysing and documenting any Default of a party in relation to the own WP activities and preparing a respective proposal for an action plan to the Coordinator



## Task Leaders

*Responsible for the timely implementation of the activities in the task and the reporting to the WP Leader*

- are taking, in agreement with the concerned WP Leader, decisions at the task level



# Effort: Project meetings

**Kick Off Meeting:** When project starts, physical meeting, good dissemination opportunity. Normally at the premises of coordinator but other location might be chosen.

**TIP:** Invite hierarchy and other important stakeholders. Media also welcome 😊

**Consortium meetings:** Physical meetings at pre-defined frequency ( $\pm 6$  months), at partners premises. To monitor progress and make decisions.

**TIP:** Try to co-locate with project events or conferences/ exhibitions.

**WP Leaders meetings:** Normally by teleconference, at pre-defined frequency (monthly or bi-weekly) to monitor progress and ensure engagement.

**TIP:** Keep them short and focused, agenda and minutes.

**Ad-hoc meetings:** When needed among various teams within the project to address specific issues and collaborate.

**TIP:** Be careful with budget.



# Effort: Project meetings

## 3.2.3. Meetings

Given the geographic spread of partners, and the execution of pilots, PARSEC will offer several meeting place options and utilise modern teleconferencing tools (e.g. Webex, Skype) to ensure continuous coordination and reduce costs. A preliminary schedule of the milestone meetings has been developed to allow evaluation of travel costs.

Milestone Meeting	ID	Project Month	Location	Subject
MM01	KO	M0	Brussels	Kick-off meeting
MM02	PM1	M6	Novi Sad	Progress Meeting; open call preparation, LSD developments
MM03	TW1	M11	Barcelona	Workshop, review of open call results
MM04	PM2	M15	Stuttgart	Progress meeting, regional workshop
MM05	MTR	M19	Harwell	Mid-term review, Jury evaluation, regional workshop
MM06	IW	M23	Thessaloniki	Network of companies
MM07	PM3	M26	Vilnius	Progress review, regional workshop
MM08	FR	M30	Brussels	Final Review,

KO: Kick-off; PM: Progress Meeting; MTR: Mid-Term Review; FR: Final Review; TW: Training Workshop; IW: Industry Engage. WS

**Table 15: Schedule of Milestone Meetings**

Further Regional Workshops will be organised as well as a workshop dedicated to finance and business enhancement for companies in the stage 2 projects. A total of 10 regional workshops have been budgeted for, of which 7 are planned adjacent to the milestone meetings. Project partners will also participate in project-relevant international events. Additional, internal project meetings are foreseen and encouraged, especially at WP level. For all meetings, the PC (or WP leader) will provide an agenda, record minutes and identify action items, in order to maintain traceability of subjects discussed and decisions taken.



# Risk: Risk mitigation and conflict management

- In a project lifetime it can be anticipated that **issues arise which could put both the quality and timing of content at risk.**
- **Risks and potential solutions needs to be identified** as early as possible to ensure successful and timely completion of the project.
- In the event of **deviations from the project's work plan**, the **Commission needs to be informed by the Coordinator without delay.** As part of the internal communication activities, the Coordinator is responsible for risk and conflict management.



# Risk: Risk Management during implementation

*“Risk management aims to mitigate any risk that could potentially harm project’s products and values. Risk manager (most of the times the coordinator), defines the process and techniques for the evaluation and control of potential risks, focusing on their precautionary diagnosis and handling*



- Identification of a risk
- Assessment of its importance and the evaluation of whether the risk level is higher than the risk that could be accepted for the project.
- In case a risk exceeds the acceptable levels, a risk analysis activity is instantiated that defines the required actions in order to set the risk within acceptable levels



- Involves the planning of the required activities to handle the risk, the re-distribution of resources, the evaluation of the results, as well as ensuring the stability of the new status

**TIP: AVOID ANALYSIS PARALYSIS**

# Risk: Risk Management during implementation

## Regular quarterly update of Risk Register – update January 2019

Initially identified risks and related contingency plans.

Description of risk	WP(s) involved	Measures	Risk occurred	Mitigation		Evaluation
				Corrective / Preventive	Executed	
<b>Operational/Functional Risks</b>						
<b>Late &amp; insufficient provision of use case definitions/specifications and data sets</b>	2	Rapid and enforced interaction between the use cases and additional iteration with WP3 support to facilitate elaboration as part of regular <u>TelCos</u> and PSG meetings.	No	P	Yes	Effective
<b>Scope creep</b>	2, 3, 4	Scope creep is managed in the scope of regular <u>TelCos</u> . In order to avoid slippage of focus in course of the project, having additional status reviews, by involving all	No	P	Yes	Effective
<b>Technical Risks</b>						
<b>IoT solutions not properly architected</b>	2, 3	Review the use case specific architectures based on the guidelines provided by WP3 and assesses feasibility of the underlying technology concept. If this does not solve the issue, a dedicated task force is formed to work out an appropriate solution.	Yes	C	Yes	Effectiveness should be improved (e.g. UCs 2.4 and 4.4) The approach as defined in D3.1 facilitated the harmonised analysis and modelling of use cases. For UC2.4, an additional review of the latest status was installed and the plans refined. The IoT solution will be architected accordingly.
<b>Intended innovative solution alternative does not match real-world requirements</b>	2, 3, 4	Identification during regular meetings and immediate communication with the developing entity to search and identify related fall-back plans (technology), based on initial contingency plans that are prepared for each use case.	No	C	No	After the Malaga meeting in end of November 2017, WP3 and 4 were analysing the key features and envisaged business models. Also WP 4 was contributing with an additional analysis and refinement of the latest business models.



# Time: Schedule and deadlines

Time management aims to ensure that the tasks start and finish according to the project work plan and that the project deliverables are submitted to EC in due time.

**All project activities need to be carefully planned already in the proposal stage, HOWEVER, be prepared for changes and delays, they will happen 100%.**

## **TIPS FOR SURVIVING DELAYS IN DELIVERABLES/ PROJECT ACTIVITIES:**

- Try to avoid by ensuring commitment of the project teams**
- Try to identify delays as early as possible and re-schedule**
- Give to deliverable time extensions, but not too long**
- Inform EC Project Officer as soon as the delay is identified, and NEVER after the deadline has expired**
- Motivate people to deliver on time, acknowledge their work when they do**





# Managing relationships with EC: Reporting

## TECHNICAL REPORTS



Technical reports are submitted electronically (in rare occasions PO might request a draft by email):

**Continuous Reporting:** Deliverables, Amendments etc.

**Regular Reporting:**

- **Periodic report** (Technical report overview: progress, achievements, differences from work plan + Continuous reporting, Financial report - Individual financial statement from each beneficiary + Periodic summary financial statement) “Explanation of use of resources” ;
- **Final report** (within 60 days of the end of the final reporting period- covers whole project period: Final technical report (publishable summary of the entire project which includes overview of the results and their exploitation and dissemination, conclusions, socio-economic impact of the project), Final financial report (final summary financial statement created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods)



# Managing relationships with EC: Reporting

## Technical Report

### PART A – STRUCTURED FORMS

The structured web-forms of Part A can be found **in the continuous reporting module** of the grant management system. You can update this information at any time during the life of the project. If you click on the below list of the forms, you will find a detailed description of the different sections leading you to the continuous reporting page of the Online Manual.

The structured tables include:

- [summary for publication](#)
- [Deliverables](#)
- [Milestones](#)
- [Ethical Issues](#) (if applicable)
- [Critical implementation risks and mitigation measures](#)
- [Dissemination & exploitation of results](#)
- [Impact on SMEs](#)
- [Open Research Data](#)
- [Gender](#)
- [Science with and for Society](#) [only for projects under this strand]
- [Energy](#) [only for projects under societal challenge 3 "Secure, clean & efficient energy"]
- [Infrastructure](#) [only for projects under "Infrastructure"]



# Managing relationships with EC: Reporting

## PART B – REPORT CORE

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Any beneficiary can contribute to the narrative part, download the word version of the [Part B template](#) from the grant management system, complete it and upload it as a pdf document under the Report Core tab.

 *There is no page limit per work package - but your report should be **concise and readable**. Avoid duplicating any text.*

### 1. Explanation of work & Overview of progress

Detail here your work carried out per WP, give an overview of your project results towards the objective (including summary of deliverables and milestones) and a summary of exploitable results (with an explanation about how they can/will be exploited).

If you have received EU funding and plan to exploit the results it generated mainly in non-EU countries not associated with Horizon 2020 - indicate how the funding will benefit Europe's overall competitiveness.

### **If applicable**

### 2. Update of exploitation & dissemination plan

Say whether the plan described in Annex 1 (Description of the Action – DoA) needs to be updated, and give details.

### 3. Update of data management plan

Say whether the plan in Annex 1 (DoA) needs to be updated and give details.

### 4. Follow-up of recommendations & comments from previous review(s)

Include the list of recommendations and comments from previous reviews and explain what action you have taken on each.

### 5. Deviations from Annex 1 (DoA)



# Managing relationships with EC: Reporting

International  
cooperation

Social Sciences  
& Humanities

Open access &  
Data management

Climate action &  
Sustainable development

Ethics

Gender

SMEs

ERA-NETs

Links to regional policy

Intellectual property

Innovation procurement

## Cross-cutting issues

- International cooperation
- Social Sciences & Humanities
- Open access & Data management
- Climate action & Sustainable development
- Ethics
- Gender
- SMEs
- ERA-NETs
- Links to regional policy
- Intellectual property
- Innovation procurement



# Managing relationships with EC: Reporting

FINANCIAL REPORTS



## Regular Reporting:

- **Periodic Financial report** Individual financial statement from each beneficiary + Periodic summary financial statement “Explanation of use of resources”
- **Final Financial report** (within 60 days of the end of the final reporting period- covers whole project period (**final summary** financial statement created automatically by the electronic exchange system, consolidating the individual financial statements for all reporting periods)



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# Managing relationships with EC: Reporting

## Financial Report

You can fill in your financial statement in structured forms in the grant management system (under *Financial Statement drafting*).



### Individual financial statements

**Beneficiaries and linked third parties** must fill these in and submit them to the Commission, as part of the periodic report.

They will be combined automatically by the system into a **consolidated financial statement**.

⚠ If you fail to do so, your **costs will be considered 'zero'** for this reporting period (though you can declare them in the next reporting period).

**Each partner reports individually and is sole responsible for their part of the budget, BUT: Financial reports of all partners need to be accepted for the payment to be released**

Period	Adjustment	Requested Contribution
01/07/2014 - 31/12/2014 (Period No: 1)	No	100,000.00 €

Cost Category	Total	Actions
a) Direct personnel costs declared as actual costs	30,000.00 €	2
b) Direct personnel costs declared as unit costs (average costs)	0.00 €	2
d) Direct costs of subcontracting	65,000.00 €	
e) Direct costs of providing financial support to third parties	0.00 €	
f) Other direct costs	3,000.00 €	2
h) Indirect costs ( $= 0.25 * (a + b + f + g)$ )	8,000.00 €	
j) Total costs ( $= a + b + d + e + f + h$ )	106,000.00 €	
k) Receipts	0.00 €	
m) Maximum EU contribution (100%)	106,000.00 €	
n) Requested EU contribution	100,000.00 €	
z) Requested EU contribution eligible for CFS	106,000.00 €	



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# Managing relationships with EC: Review Meetings

## WHO ATTENDS?

- Project Officer(s)
- Independent reviewers
- Project team (Coord. +WP Leaders)
- Periodically (after reports)
- EC premises or project site

## WHEN/WHERE?

### REVIEW MEETINGS

## WHAT?

- Project progress
- Use of resources
- Challenges/ problems
- Recommendations
- Objectives/ milestones
- Continuation of funding
- Release of payment

## WHY?



# Managing relationships with EC: Project Officers



## *Basics for smooth collaboration*

- From various academic/ professional backgrounds
- Professionalism is very important
- Written communication is necessary, but sometimes a phone call helps.
- Building trust with PO is a basic duty of the coordinator
- If there are any problems/ challenges be transparent and ask for their support
- Always acknowledge their contribution
- Always invite them to project events
- They have their own agendas, sensitivities, ambitions etc
- They may change in the course of the project
- Every PO has his/her own style but basic rules apply to all

- **Employees of EC in charge of your project**
- **Highly educated and usually experienced**



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Teşekkür ederim!

Thank you!



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