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Technical Assistance for Turkey in Horizon 2020 Phase-II

EuropeAid/139098/IH/SER/TR

Practical aspects of CA and MGA

Information Multipliers System Training (IMS-4)

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REPUBLIC OF TURKEY
MINISTRY OF INDUSTRY
AND TECHNOLOGY



COMPETITIVE
SECTORS
PROGRAMME



TÜBİTAK

Structure and format

1. **Introduction** and ‘warm up’ (3 mins)
2. **A case study**: Seeing things in reverse order: from the project conclusion to its start (7 mins)
3. Some **good practices to follow** (7 mins)
4. **Final remarks and take away messages** (3 mins)

1. Introduction

- In *theory*, *practice* is simple
- In *theory*, there is no difference between *theory* and *practice*. But, in *practice*, there is...
- MGA: ***we simply follow the rules*** – if we don't like them, it may be too late to change them!
- (But it is still good to be aware of them! Many organisations are not aware of them at all...)
- CA: here ***we can define the rules*** and the conditions – there are many degrees of freedom!

1. Introduction (cont'd)

Two worlds apart:

1. Legal and admin experts from the one side
2. Scientists and researchers on the other side

Both worry for different aspects:

1. The first care to avoid 'problems' and organise work in assembly lines
2. The second ones care to have their project starting asap, financing arriving to hire people for work in the project

2. A case study

- It is about a recently completed IA project
- Project ended by August 2020
- Was undoubtedly a success
- It also resulted in the set up of a spin-out company
- Is there anything to worry about?
- Devil is in the details
- Beware the fine print!

2. A case study (cont'd)

5.2 Limitations of contractual liability

No Party shall be responsible to any other Party for any indirect or consequential loss or similar damage such as, but not limited to, loss of profit, loss of revenue or loss of contracts, provided such damage was not caused by a wilful act or by a breach of confidentiality.

Thank you and best regards,
Anna

Contact:

Legal Matters Relating to Research and Transfer

2. A case study (cont'd)

- Does it mean it was not a good project?
- Not at all - quite the opposite!
- The independent reviewers mentioned in the Final Consolidated Review Report:
 - ‘... project has delivered exceptional results with significant immediate or potential impact’
 - ‘... formation of spin out company for further exploitation’
 - ‘... expected impact is high’

3. Good practices to follow

Some conditions to cope with proactively:

1. Which background knowledge each party shall use within the project? To be stated clearly!
2. Which foregrounds shall be built during the project lifetime and by whom? To be stated clearly!
3. How foregrounds shall be shared after the project terminates? To be stated clearly!
4. How shall use of individual background IPs shall evolve / affect exploitation of the project results? To be stated clearly!

In our case:

1. Background IPs were mentioned but were *not very relevant*
2. Foregrounds were related to Deliverables – there, responsibilities are not clear –*blurry ownerships*
3. Regarding the use of foregrounds after the project terminates *still open issues*
4. Same also regarding the use of individual background IPs after the project terminates *still open issues*

In short: we plan for the marriage but not for the divorce

3. Good practices (cont'd)

- Is it *easy* to keep track on everything? Yes!
- Assets developed and used in the project can be ***continuously*** monitored
- Why is this *difficult*?
- Because from the two worlds apart in the beginning, there become now three:
 1. Technical personnel may exhibit either a culture of sharing *or the opposite of*
 2. Project management personnel 'does the splits' between solving problems and remedying symptoms to avoid going deep in the details
 3. Legal and admin personnel of the institutions is not actively involved in the project developments (and prefers to do so)

4. Final remarks & take away messages

- The new proposal template in Horizon Europe and the impact canvas may provide the means for better identifying the various assets ('Expected results' & 'Outcomes')
- Responsibilities and ownership can be from an early on stage decided and defined
- One can still keep their **rose-colored glasses** while also leaving relatively little space for future misunderstandings
- Inherent difficulty: proposals are written under the state of enthusiasm: *over promising* and *under delivering*.
- All worth to try the opposite: *under promising* and *over delivering*

For follow-up questions contact me at:

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Q&A

Time to ask your
questions!

Teşekkür ederim!

Thank you!

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