



Technical Assistance for Turkey in Horizon 2020 Phase-II EuropeAid/139098/IH/SER/TR

Horizon Europe Administrative Procedures & Tools

IPR, Legal and Financial Training: Proposal Preparation & Submission

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Istanbul, 7-8 DEC 2021











What we will cover



From Policy to Action: Understand the process



- Work Programme 2021-22
- EC Portals
- Admissibility & Eligibility
- Financial & Operational capacity
- Award criteria &Procedure
- Proposal Template
- Model Grant Agreement









Use Sli.do



Post your questions, Vote in our polls











How it works?



The process of getting a grant

EU Priorities & MFF 2021-27

Horizon Europe Strategic Plan 2021-2024

01

WORK

02

CALL FOR

PROPOSALS

Portal

• 1 or 2 Stages

Objectives

Specific Aim &

· Specific Rules,

Eligibility, budget

Published in F&T

03

SUBMISSION OF PROPOSALS

- Eligible entities
- Through F&T portal
- Templates
- Digital procedure (fully online)

04

EVALUATION - SELECTION

- 2-3 Independent Experts
- Consensus
- Panel Review
- Evaluation
 Summary Report

INVITATION TO GRANT

05

- Validate
- Inform
- Prepare
- Sign Grant Agreement

Selection, Award Criteria

· Rules, Eligibility,

PROGRAMME 21-22

Multiannual

Thematic

Priorities

Prepared by EC

MINISTRY OF INDUSTRY
AND TECHNOLOGY







Get ready for Horizon Europe Calls



How to prepare for HE



Study the Policies

- Strategic Plan 2021-24
- Strategic Plan Analysis
- General Intro of WP 2021-22



Identify your call

- Scan the WP to find a relevant call to your interests
- Study carefully the call text
- Study General Annex of WP



Start building

- Study the new Proposal Template
- Prepare your concept
- Build your consortium
- Legal Documents (MGA, CA)









Learn the Digital Tools



The online platforms of EU funding







Find Partners



Build your case

- EU Funding & Tender Opportunities Portal
- CORDIS, EU Research Results ▶
- Horizon Results Dashboard
- Financial Transparency System

- Enterprise Europe Network
- EU IP Helpdesk ▶
- Eurostat Statistical Office of EU
- EU Strategy & EC policies ▶





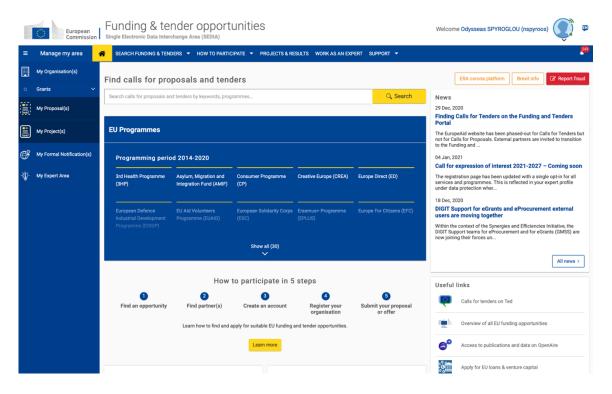




EU Funding & Tenders Portal



The entry point to EU funding



EU Funding & Tender Opportunities Portal

- Search Opportunities
- Register as a participant
- Projects & Results @
- Search Partners
- Work as an Expert





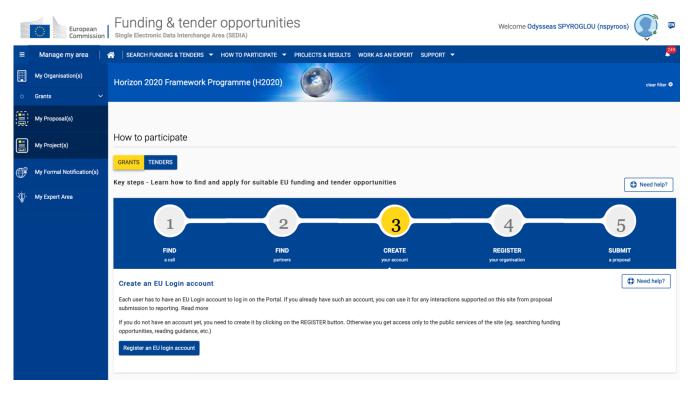




EU Funding & Tenders Portal



Accounts and Registrations



Before you can benefit:

- Create an Account
- Register your organisation

<u>Detailed process in our</u>
TH2020 helpdesk ▶





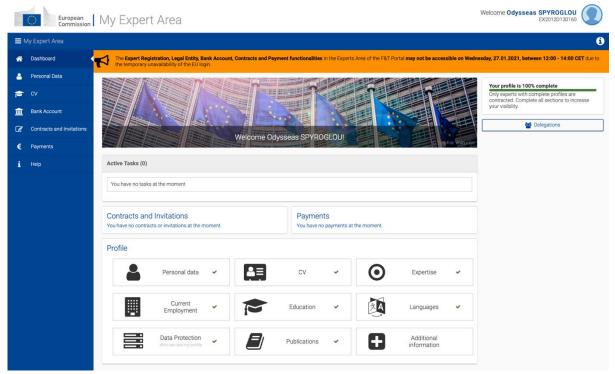




EU Funding & Tenders Portal



Become an expert



External experts assist in **evaluation** of **grant applications**, **projects** and **tenders**, and to provide opinions and advice in specific cases.





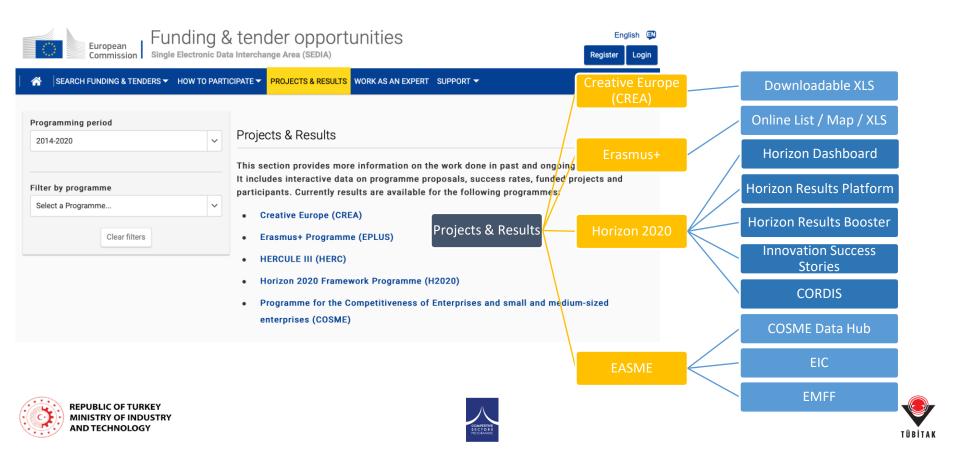




Horizon Projects & Results



Navigating to Projects and Results

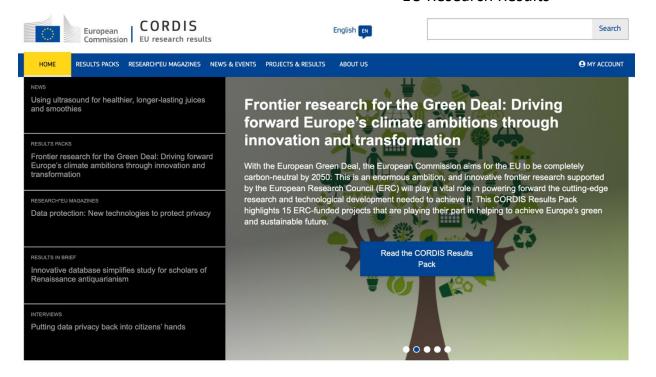




Cordis Portal (I)



EU Research Results



CORDIS, EU Research Results ▶

- Results & projects in simple language
- Result Packs organised by area
- Research*EU magazine
- News & Events





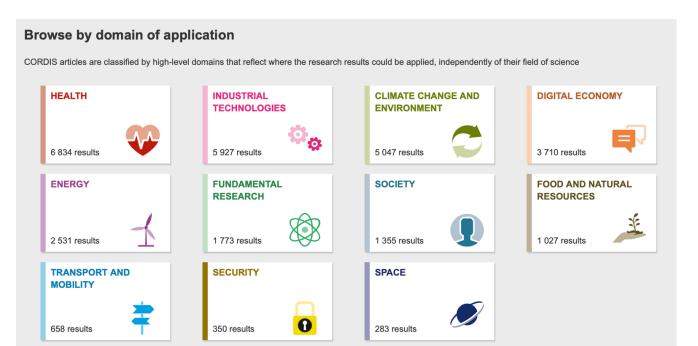




Cordis Portal (II)



EU Research Results



- Results organised by domain of application
- Keywords
- News, Events
- Project summaries, deliverables, publications, links

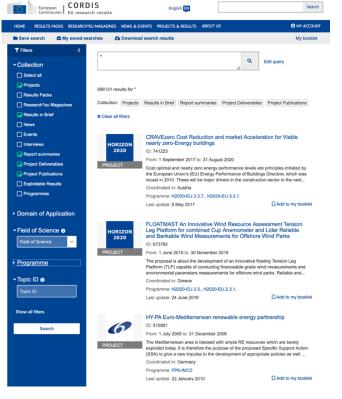




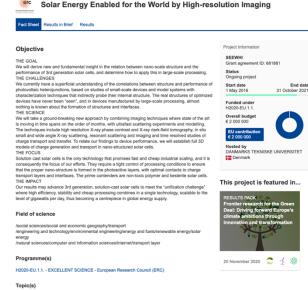


Cordis Portal (III)





EU Research Results



- Powerful search & Filtering
- Factsheets of all related projects
- Export in CSV, XML
- Create a booklet and download it in pdf





ERC-CoG-2015 - ERC Consolidator Grant

Call for proposal

Funding Scheme

See other projects for this call

ERC-COG - Consolidator Grant

ERC-2015-CoG





Cordis Portal (IV)



Datalab



European Commission CORDIS

Bringing you the results of EU research and innovation framework programmes since 1990: Horizon



- Dynamic map of Collaboration networks
- Links to other organisations
- List of projects (H2020)

https://cordis.europa.eu/datalab/datalab.php





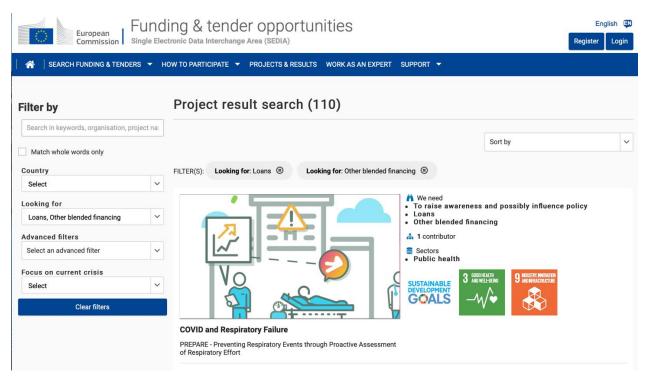




Horizon Results Platform (I)



An organised database of project results



- Introduced in 2019
- Aims to make project results more accessible
- Integrate and consolidate EU funding tools
- Offers filters, advanced search





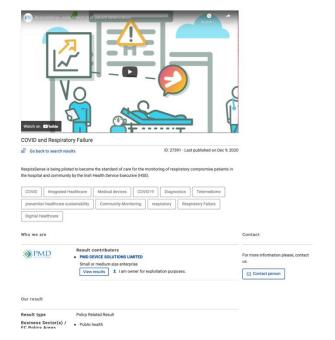




Horizon Results Platform (II)



An organised database of project results





Detailed Profiles

- Contributors (organisations)
- Result type, description, business sector
- Needs
- Target Audience
- Contribution to SDG
- Link to project (CORDIS)





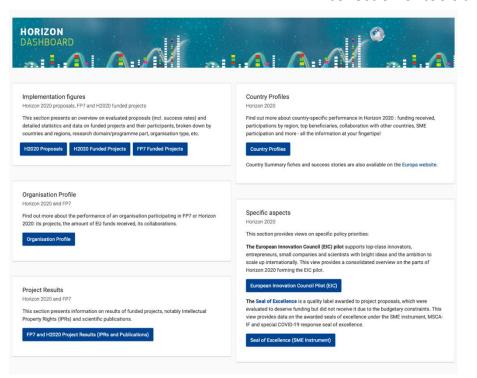




Horizon Dashboard



A collection of tools and databases



Dynamic Tools with a trove of information:

- FP7 Projects
- H2020 Proposals
- H2020 Projects
- Country & Organisation Profiles
- European Innovation Council (EIC)
- Links to tutorials and Videos





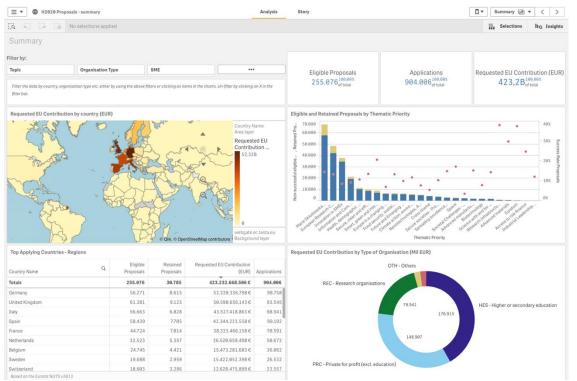




Horizon Dashboard (II)



Horizon 2020 Proposal Summary



H2020 Proposals

- Filter by
 - Topic
 - OrganisationType
 - SME
 - Ftc.





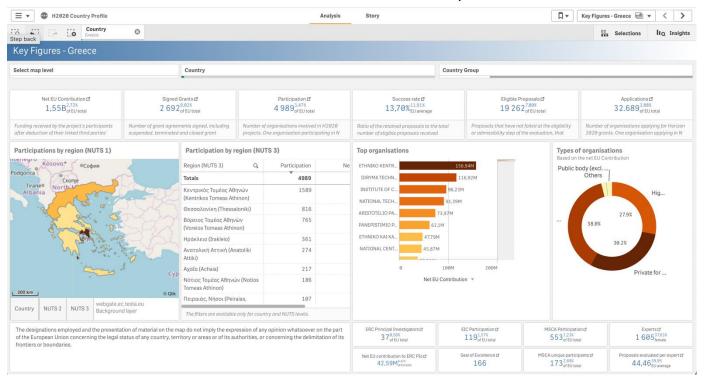




Horizon Dashboard (III)



Country Profiles



Country profiles
You can filter and
organise by:

- Groups of countries
- Regional Level
- Free selection





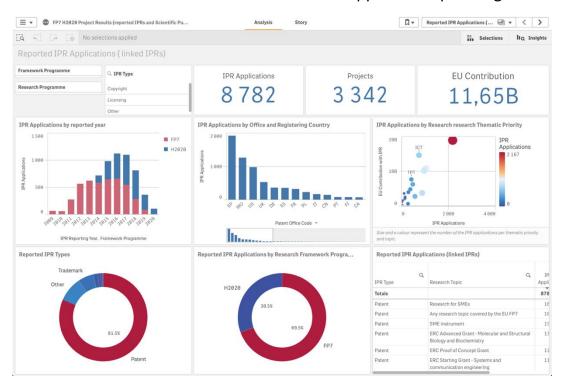




Horizon Dashboard (IV)



IPR Applications per Programme & Type



You can filter and organise by:

- Framework programme (FP7, H2020)
- Thematic Priority
- IPR Type (Patent, Copyright, Design, etc.)









Horizon Results Booster



Navigating to Projects and Results



Horizon Results Booster
Steering research towards
strong societal impact,
concretising the value of R&I
activity for societal challenges

Receive expert support free of charge to
disseminate effectively and/or boost
exploitation potential of your research



Read more >>





>>> REQUEST SERVICES <<<

Read more >>

- creating **results portfolio** with other projects
- dissemination strategy
- exploitation plan
- 2. support to develop business plan
- 3. Assistance, coaching and mentoring for **go-to-market activi**ties.





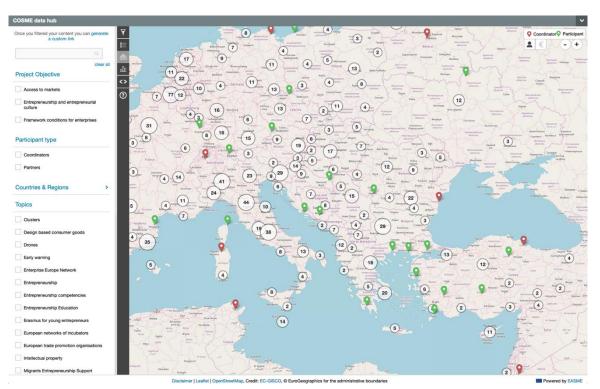




EISMEA Data Hubs



COSME Data Hub



Executive Agency for SMEs:

- Bio-Based Industries Joint Undertaking
- COSME
- <u>European Maritime and Fisheries Fund</u> (<u>EMFF</u>)
- Horizon 2020 Energy Efficiency
- Horizon 2020 Societal Challenge 'Climate action, environment, resource efficiency & raw materials'
- EIC Accelerator
- EIC Fast Track to Innovation
- EIC Pathfinder Open
- Horizon 2020 Innosup
- Maritime









Financial Transparency System



A-Z Index | Sitemap | About this site | FAQ | What's New | Legal notice | Contact | Search | English (en)

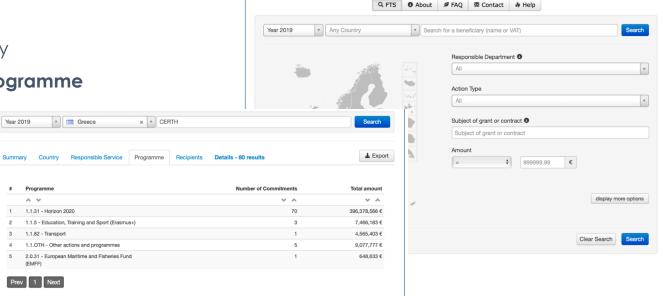
FINANCIAL TRANSPARENCY SYSTEM

Funding contributing to the EU policies

Search by

- Year
- Country
- Specific beneficiary

Get full report per programme



European Commission > Budget > Financial Transparency System (FTS)









Data & Insights



Statistical Information for informed decisions

Do your research, find your data, build your proposal

- European IPR Helpdesk
- EUIPO ▶
- Eurostat ►
- <u>EU Open Data Portal</u> ▶, <u>OECD</u> ▶, <u>UNData</u>
- European Open Science Cloud
- Publications Office of the EU







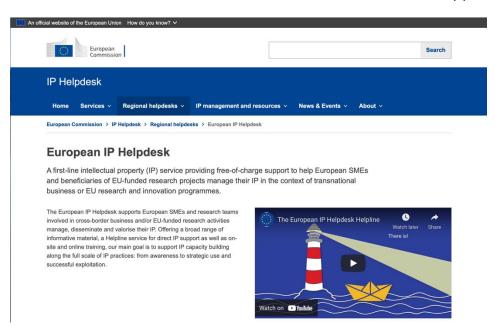




European IP Helpdesk



IP advise and support for SMEs



https://www.iprhelpdesk.eu

REPUBLIC OF TURKEY MINISTRY OF INDUSTRY AND TECHNOLOGY



Services

- Training Events (Webinars)
- Library (Fact sheets, Templates, Case studies, Guides, etc.)
- EEN Ambassadors
- Helpline

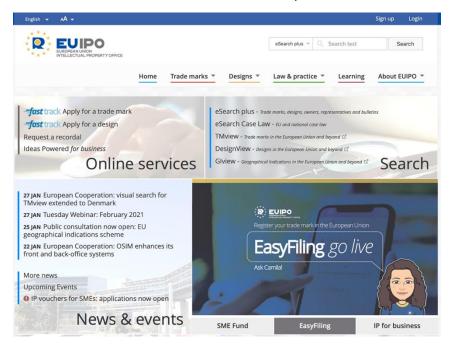




EUIPO



European Union Intellectual Property Office



- ONLINE SERVICES for Registering IP (Trademarks, Designs)
- SEARCH IP Databases
- LEARNING (IP Learning portal)
- OBSERVATORY (Facts & Figures)

https://euipo.europa.eu





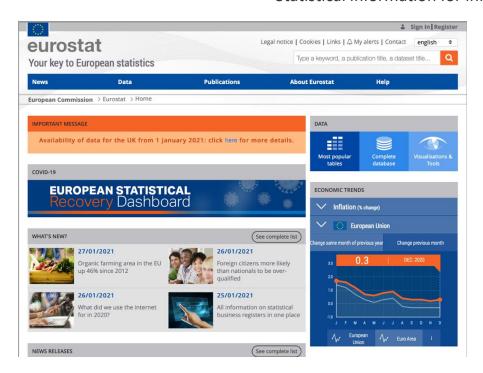




Eurostat



Statistical Information for informed decisions



- · Statistical Data by theme
- Euro-Indicators
 - Sustainable Development
 - Circular Economy
- COVID-19
- Recovery Dashboard
- Economic Trends









Open Data



Open Data sets from EU, OECD, UN

Data freely available to everyone for use and reuse, republishing with no restrictions, patents or any other protections.



https://data.europa.eu/euodp/en/home



https://data.oecd.org



https://data.un.org





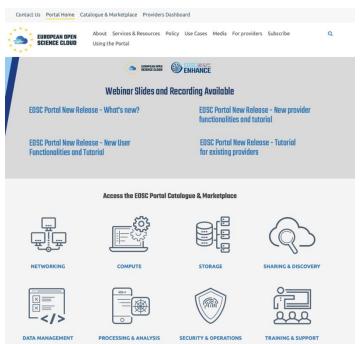




European Open Science Cloud



A new EU initiative for Open Science



- **1.7 m** researchers
- 70 m professionals in science, technology, humanities and social sciences
- Virtual environment
- Open services for
 - Storage
 - Management
 - Analysis
 - re-use of research data
- Across borders and scientific disciplines
- Federating existing scientific data infrastructures

https://eosc-portal.eu/





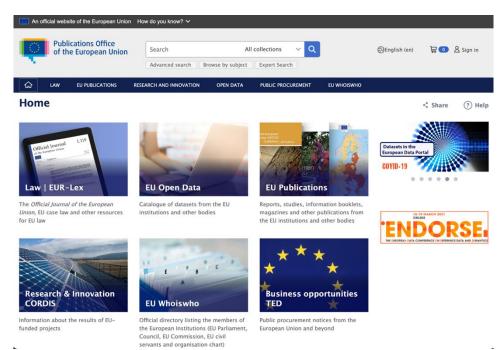




EU Publications



Publication office of the EU



- EUR-Lex
- EU Publications
- EU Who-is-Who
- EU Treaties
- Magazines
- Studies

https://op.europa.eu/en/home



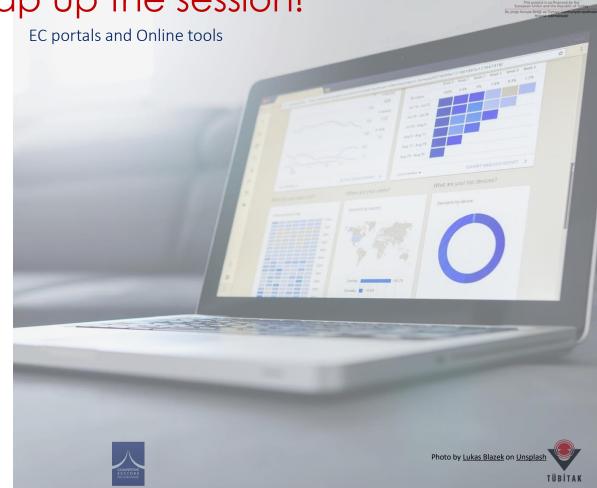






Wrap up the session!

- EU Funding Portal
- Projects & Results
- Visualisation Dashboards
- Data hubs
- Data Repositories
- Open Science
- EU Publications











https://ec.europa.eu/info/funding-tenders/opportunities/portal/











General Conditions for Participation



General Annexes



- admissibility and eligibility, financial and operational capacity and exclusion (Annexes A-C)
- award criteria, mandatory documents and evaluation procedure (Annexes D-F)
- legal and financial set-up of GA(Annex G)
- specific conditions (PCP, or Innovation Procurement (Annex H)









Admissibility



Annex A: What you need to submit



- Before deadline
- Use the form and submit through the online system
- Readable, accessible, printable
- Include a plan for the exploitation and dissemination of the results (PEDR)
- Respect the page limits

PAGES	45	30	70	10
	IA, RIA	CSA	CO-FUND	STAGE 1









Eligibility



Annex B: Can you participate?



- Any Legal Entity
- Registered to the Participants Register (PIC)
- Affiliated Entities
- Associated Partners
- Entities without Legal Personality
- EU Bodies
- Restrictions on participation my apply.









Eligibility



Annex B: Can you get funding?



Partners must be established in:

- EU Member States
- Overseas Countries and Territories (OCTs)
 linked to the Member States
- Countries associated to Horizon Europe
- Low and middle-income countries

Be careful for specifc eligibility conditions eg. WIDENING









Eligibility Annex B: Consortia





How many partners?

- 1 independent legal entity established in a MS +
- 2 other independent legal entities each established either in a different MS or an AC.









Eligibility



Annex B: Eligible Activities



- Exclusive focus on Civil Applications
- No human cloning, no modification of genetic heritage
- In compliance with EU policies (Environmental, Social, Security, etc.)









Financial Capacity



Annex C: Can you financially support the project?



- Do applicants have sufficient financial resources?
- Check before GA (P&L, Balance Sheet, audit, BP)
- Usually only for Coordinators > 500K









Operational Capacity



Annex C: Do you have the know-how & resources?



In PART B:

- general profiles (qualifications and experiences) of staff
- consortium participants,
- EU funded actions/projects for the last 4 years.









What a proposal consists of?



All components of a proposal

Part A Part B Section 1 - 3 Section 4 - 5

- General information
- Participants and Contacts
- Budget (per partner)
- Ethics issues
- Call specific questions
- Table of participants
- Proposal abstract
- Abbreviations
- Table of contents

- 1 Excellence
- 2 Impact
- 3 Implementation

- 4 Members of the consortium
- 5 Ethics and Security









Award Criteria



How Proposals are evaluated

EXCELLENCE	IMPACT	IMPLEMENTATION
 Are objectives clearly identified? Is proposed work is ambitious? Goes beyond the state-of-the-art? Is proposal sound? 	 Is the pathway suggested credible? Are outcome and impacts in line with WP? What's the scale of the contributions? Are measures to maximise impact suitable? 	 Is the WP effective? Are risks identified? Effort assigned appropriate? Capacity and role of participants? Consortium as a whole?





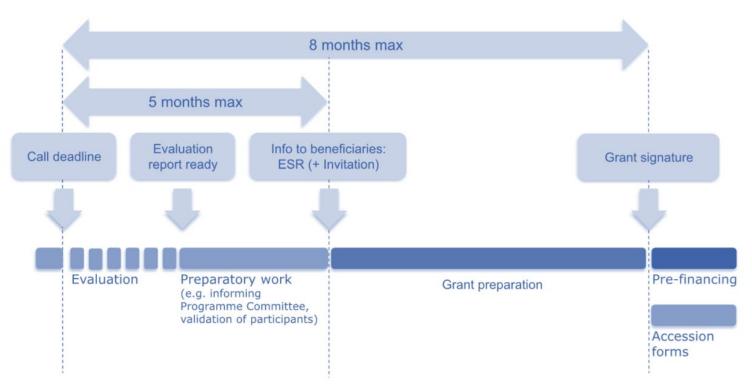




How evaluation works?



The evaluation timeline







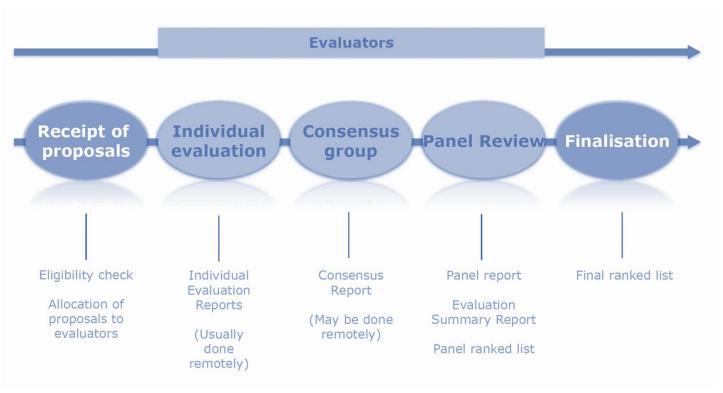




Evaluation Process



From submission to invitation to a Grant







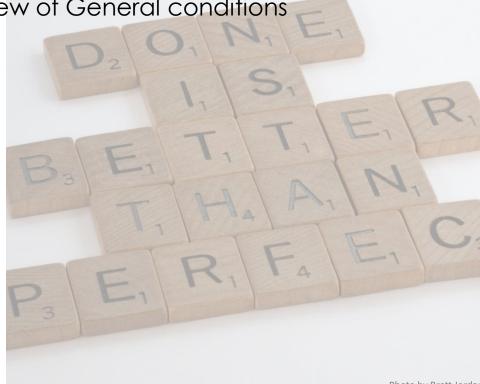




Wrap it up

An overview of General conditions

- Administrative Issues
- Participation
- Admissibility
- Eligibility
- Operational Capacity
- Financial Capacity
- Evaluation process













Use Sli.do



Post your questions, Vote in our polls













Q&A

Time to ask your questions!













