



This project is co-financed by the
European Union and the Republic of Turkey

Bu proje Avrupa Birliđi ve Türkiye Cumhuriyeti tarafından
finanse edilmektedir



TURKEY in
HORIZON 2020
COOPERATION INNOVATION COMPETITIVENESS

Technical Assistance for Turkey in Horizon 2020 Phase-II

EuropeAid/139098/1H/SER/TR

Horizon Europe: Plan your project in post award phase PM & Implementation Section

IPR2 Workshop

Odysseas Spyroglou, KE2

Istanbul, 15 – 16 Sep 2022

Photo by Christian Lue on Unsplash



REPUBLIC OF TURKEY
MINISTRY OF INDUSTRY
AND TECHNOLOGY



What we will cover

Project Management in Proposal Phase (Pre-award)



- **Understand the legal documents** and the contractual agreements
- **Simple tools** and practices for monitoring project progress and costs
- **Project documentation** for formal but also practical reasons
- Conduct **effective project meetings**
- Contract amendment and when you need them
- Have successful project reviews by the EC/Funding Agency

Coordinator or Participant?

What the role of each



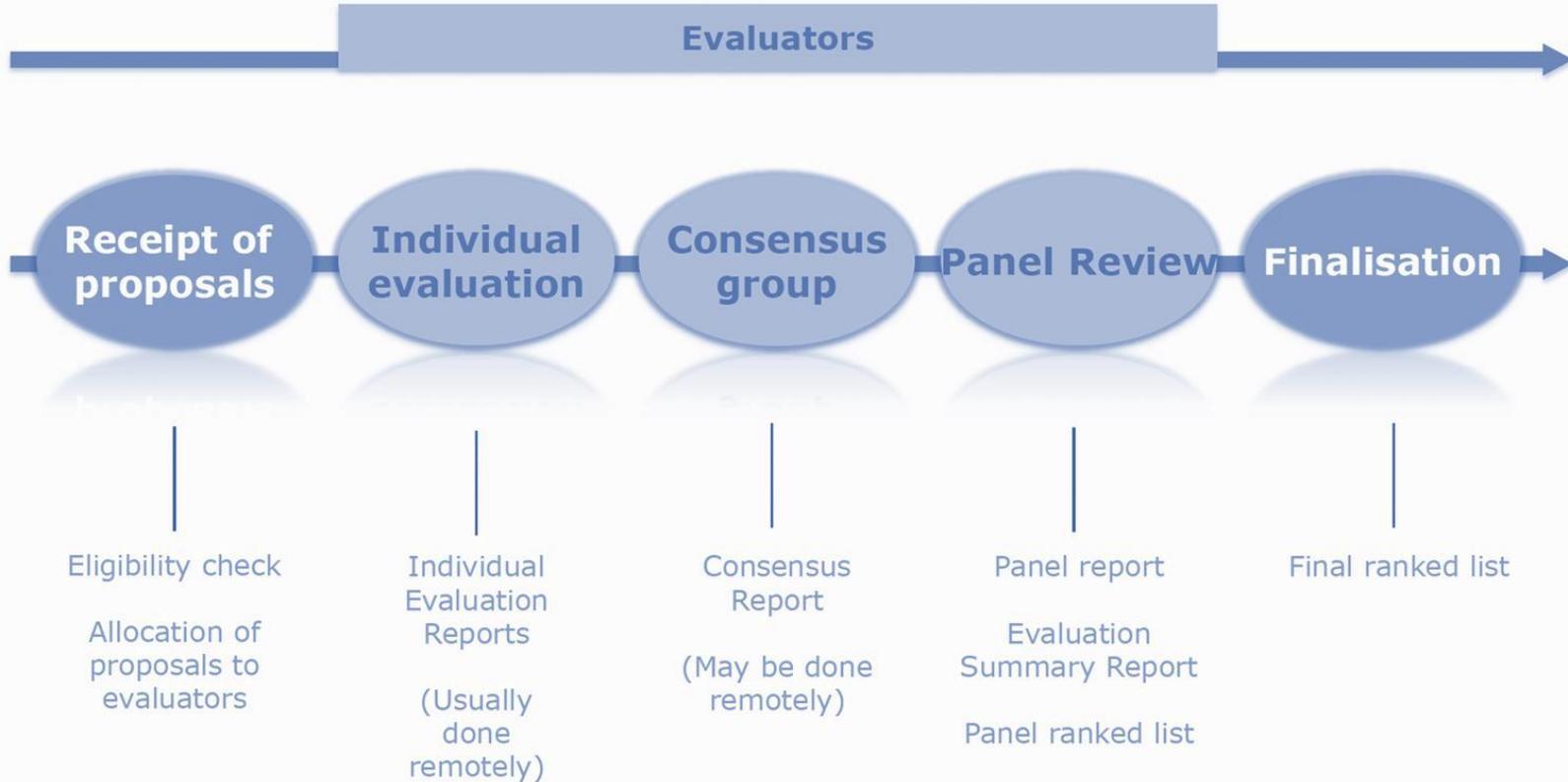
- Single point of contact with PO
- Distributes funds
- Coordinates all activities
- Prepares all legal documents
- Communication w/ partners
- Mediates and resolves issues between partners (if necessary)



- Communications through COO
- Manages own funds
- Manage only own activities
- Reviews, approves signs necessary legal documents
- Responsible own record keeping

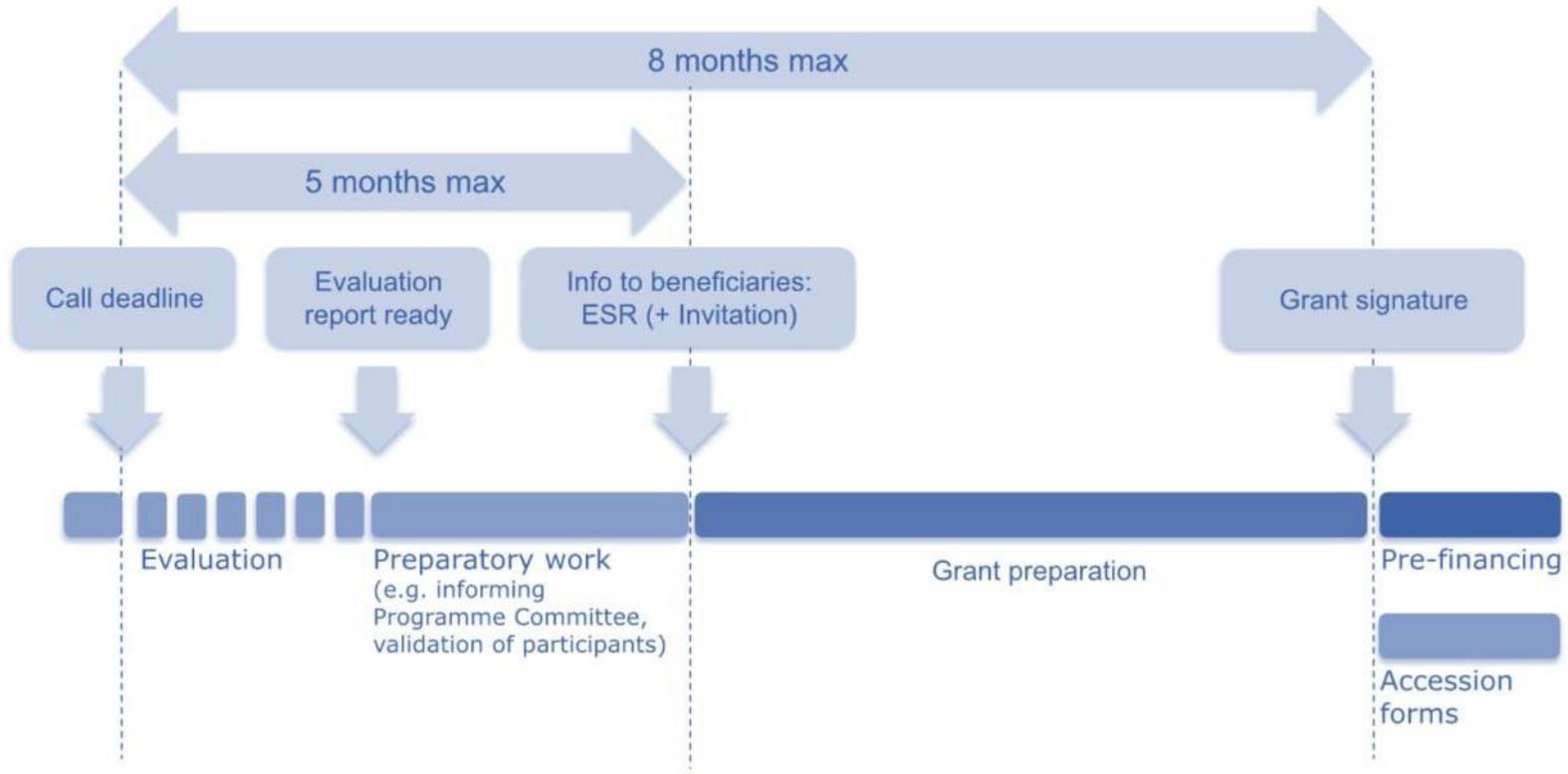
Evaluation Process

From submission to invitation to a Grant



Where we are

What happens after you get the good news



Grant Preparation

The role of each one

- Consortium Agreement
- Rights and obligations of the partners.
 - Internal organisation
 - Cannot conflict GA
 - Preparation costs not eligible
 - Intellectual property rights.
 - No model by EC.
 - Use DESCA or other but can be



- Model Grant Agreement
- Between EC and Partners (COOR)
 - Partners Commitment
 - Signed by EC and COOR
 - PARTNERS sign Accession Form
 - Signed by authorised representatives
 - Rules for implementing the action
 - EC provides Non negotiable Model



EU Grants

AGA – Annotated Model Grant Agreement

EU Funding Programme 2021-2027

PRO-DRAFT (2021) - NOT VALID FOR ALL PROGRAMMES

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Obligatory for most

Must be signed prior to the Grant Agreement (GA).

Obligatory for all

Must be signed before the start date of the grant

Consortium Agreement

Provisions

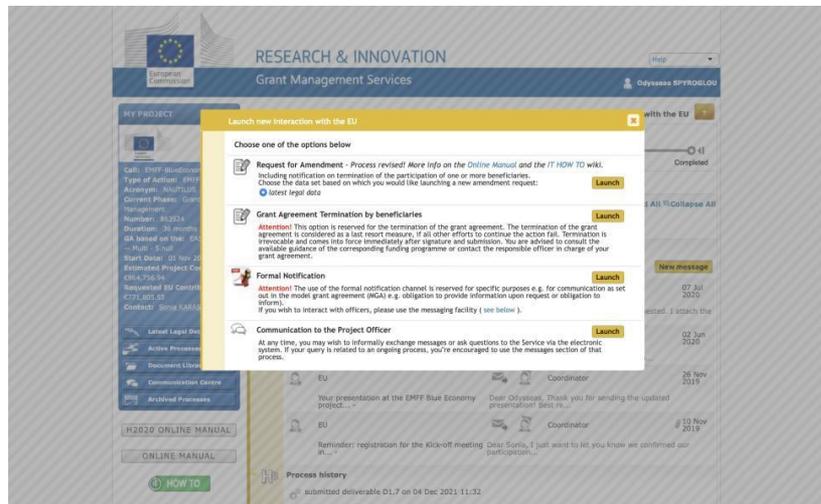


- **General provisions:** definitions, entry into force, duration, applicable law etc.
- **Obligations of partners:** deadlines for deliverables and reports, information obligations, participation in meetings etc. and consequences of non-compliance
- **Internal organisation and decision-making:** composition and duties of bodies (corresponding to the size of the consortium), meetings, voting rules etc.
- **Financial provisions:** allocation of funding and transfer to the partners (e.g. payment of pre-financing in instalments), handling of receipts and financial losses etc.
- **Provisions on the handling of intellectual property rights:** more detailed information about the consortium's ability to specify the handling of intellectual property rights, access rights and project results can be found under "Downloads" (see below).
- **Other issues:** liability, non-disclosure, dispute resolution etc.

Grant Agreement

What is an amendment and when is it necessary?

- When?
 - Significant changes to the GA: change of partner or coord, change of Annex 1,2 (activities, budget)
- How?
 - Through the EC Grant Management System



- Who?
 - All consortium participants together, but only the Coordinator can launch, sign and submit.

NOT necessary for:

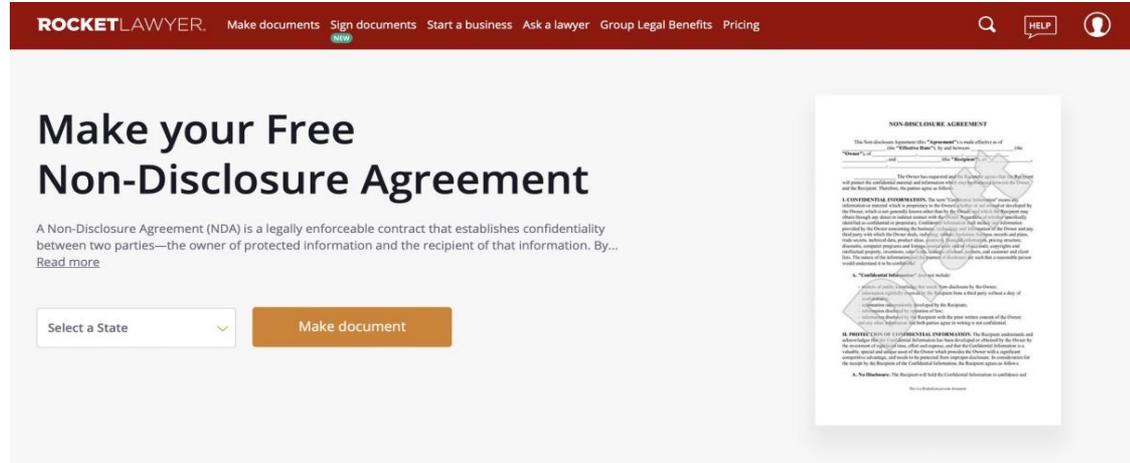
- budget transfers covered by the budget flexibility
- name or address changes of a participant — done directly in the Participant Register
- universal takeovers (merger/acquisition) of a participant — done directly in the Participant Register
- changes of the banking details — done directly in the Participant Register.

Other Legal Documents

Non-Disclosure Agreements (NDA)

- The confidential information;
- Who has access to it;
- What they may do with it;
- how it will be kept confidential;
- how long it will be kept confidential;
- (penalties for breaking the agreement)

NOT LEGAL ADVISE



ROCKETLAWYER. Make documents Sign documents Start a business Ask a lawyer Group Legal Benefits Pricing

Make your Free Non-Disclosure Agreement

A Non-Disclosure Agreement (NDA) is a legally enforceable contract that establishes confidentiality between two parties—the owner of protected information and the recipient of that information. By... [Read more](#)

Select a State

NON-DISCLOSURE AGREEMENT

This Non-Disclosure Agreement (the "Agreement") is made effective as of _____ (the "Effective Date"), by and between _____ (the "Discloser") of _____ and _____ (the "Recipient") of _____.

The Discloser has represented and warranted to the Recipient that the Confidential Information is confidential, proprietary, and/or otherwise subject to legal protection, and that the Recipient is not a party to the disclosure of such information.

I. CONFIDENTIAL INFORMATION. Confidential Information means all information, including but not limited to, trade secrets, know-how, inventions, processes, methods, formulas, designs, drawings, software, code, data, databases, algorithms, and other information, whether or not patentable, that is disclosed by the Discloser to the Recipient, in any form or by any means, and that is marked as confidential, proprietary, or otherwise subject to legal protection. Confidential Information includes information that is marked as confidential, proprietary, or otherwise subject to legal protection, and information that is marked as confidential, proprietary, or otherwise subject to legal protection, and information that is marked as confidential, proprietary, or otherwise subject to legal protection, and information that is marked as confidential, proprietary, or otherwise subject to legal protection.

II. PROTECTION OF CONFIDENTIAL INFORMATION. The Recipient understands and acknowledges that Confidential Information is confidential, proprietary, and/or otherwise subject to legal protection, and that the Recipient is not a party to the disclosure of such information. The Recipient agrees to keep the Confidential Information confidential, and to use the Confidential Information only for the purposes intended by the Discloser. The Recipient agrees to keep the Confidential Information confidential, and to use the Confidential Information only for the purposes intended by the Discloser.

III. No Obligations. The Recipient will not be bound by the confidentiality obligations set forth in this Agreement if the Recipient can demonstrate that the Confidential Information is not confidential, proprietary, or otherwise subject to legal protection.

Other Legal Documents

Memorandum of Understanding (MoU)

- MoUs are agreements in the form of legal documents.
- Same affect as «Letter of Intent», agreement on good faith among the signatories, on the basis that it is a fair and honest representation of their intentions.
- **an MoU should identify:**
 - protocols for communication;
 - information exchange;
 - reporting;
 - confidentiality issues, and
 - modifications and conditions for terminating the agreement.

NOT LEGAL ADVISE

SignWell

Security Pricing Log In

Memorandum of Understanding (Free Sample)



Here is What's in the Memorandum of Understanding:

- An agreement that covers terms and details of an understanding between two parties
- Sample agreement text that's easy to customize and use
- Created (and approved) by legal experts

Get the Memorandum of Understanding 

Project monitoring

Set the mechanism in motion

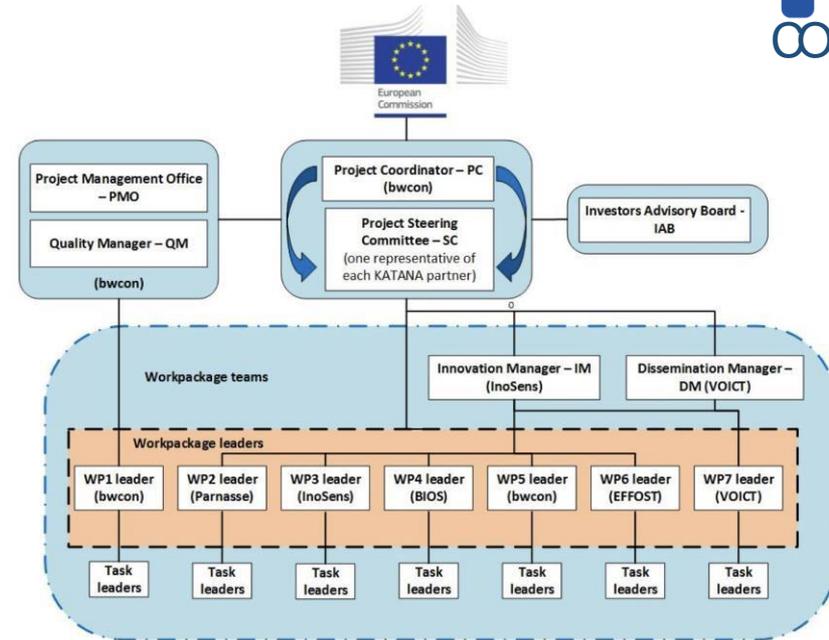
- **Deploy the PM mechanism**
- **Translate project documentation** to understandable and actionable instructions
- Organise everything in a **single place**
- Introduce **templates** to ensure consistency
- **Educate** and train partners to user it
- **Communicate** what is expected
- Organise frequent consortium **meetings**



Project monitoring

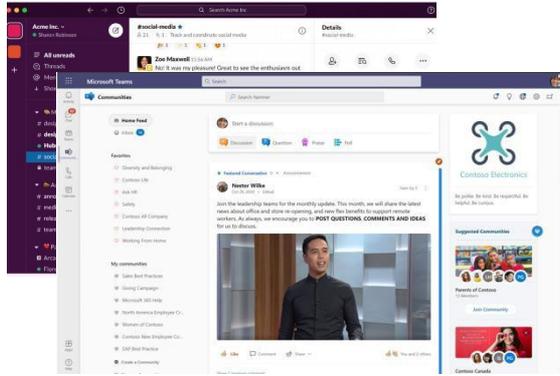
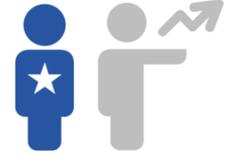
The PM mechanism

- Described in Part B of DoA
- Detailed in CA (if necessary)
- Communicated to and approved by all partners
- Coordinator is single point of contact with EC services and PO
- WP Leaders and Task Leaders must take ownership of outputs and deliverables.



Step 9: Proposal Preparation

Setup a productivity stack



A fully working template to help you

#	Name	Short Name	Country	Type	PIC	Person-Month (PM)	PMMonths	Total Budget	Funding Rate	Grant
1	COORD	COO	TR	SME		4,800.00 €		0.00 €	100.00%	0.00 €
2	PARTNER 1	PAR1	GR	SME		4,700.00 €		0.00 €	100.00%	0.00 €
3	PARTNER 2	PAR2		SME		5,500.00 €		0.00 €	100.00%	0.00 €
4	PARTNER 3	PAR3		SME		6,000.00 €		0.00 €	100.00%	0.00 €
5	PARTNER 4	PAR4		SME		8,000.00 €		0.00 €	100.00%	0.00 €
6	PARTNER 5	PAR5		RESEARCH		4,819.00 €		0.00 €	100.00%	0.00 €
7	PARTNER 6	PAR6		RESEARCH		7,800.00 €		0.00 €	100.00%	0.00 €
8	PARTNER 7	PAR7		PUBLIC		5,500.00 €		0.00 €	100.00%	0.00 €
9	PARTNER 8	PAR8		CLUSTER		5,400.00 €		0.00 €	100.00%	0.00 €
10	PARTNER 9	PAR9		CLUSTER		6,120.00 €		0.00 €	100.00%	0.00 €
11	PARTNER 10	PAR10		CLUSTER		4,000.00 €		0.00 €	100.00%	0.00 €
13							0	0.00 €		0.00 €
DO NOT CHANGE YELLOW CELLS										

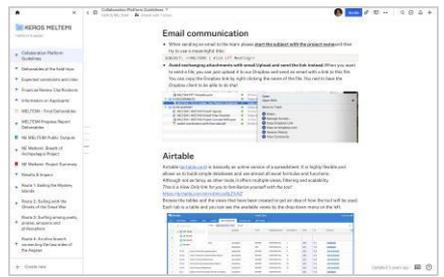


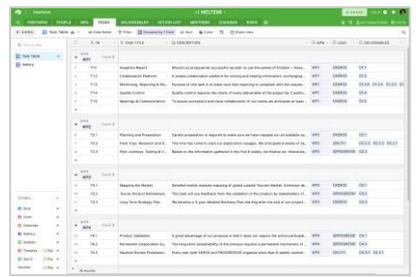
<https://bit.ly/HE-template>

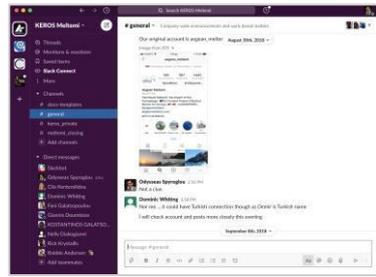
Project monitoring

Translate Project Documentation

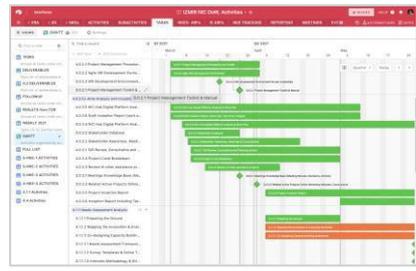
- Set up you PM Stack: your tools to manage the project

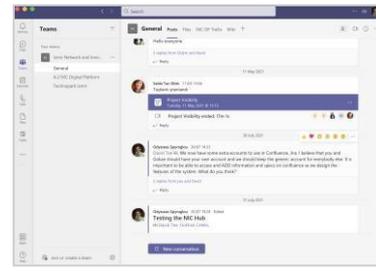








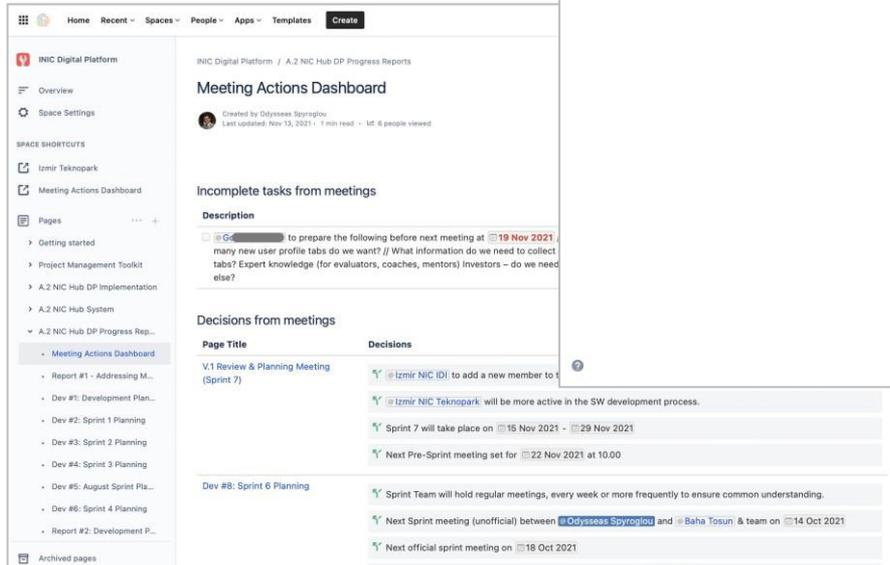


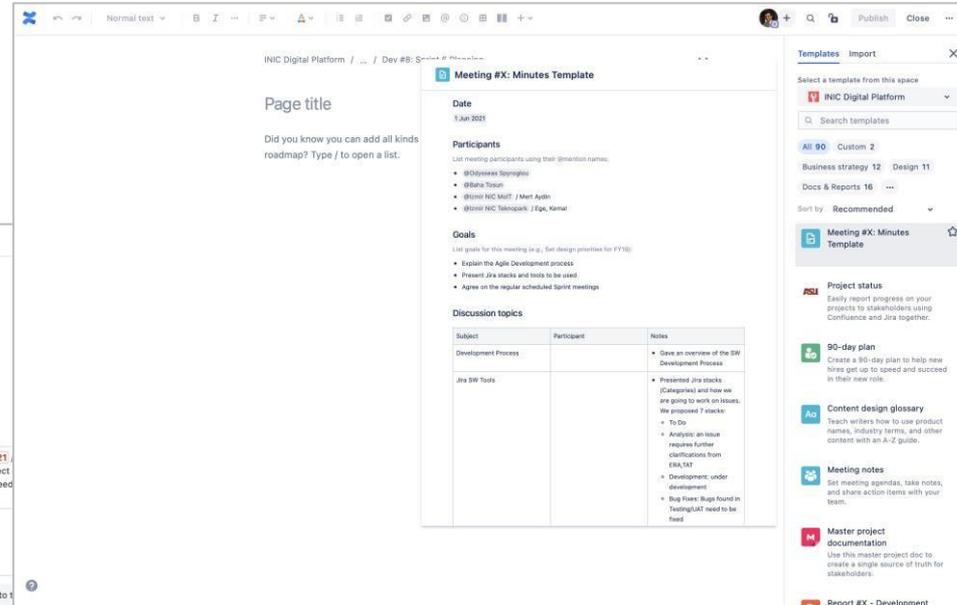

Effective communication

Conduct successful meetings

- Set a fixed time in the calendar for meetings
- Always have an agenda



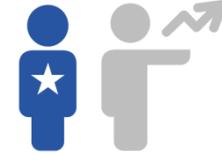
The screenshot shows the 'Meeting Actions Dashboard' in Jira. It includes sections for 'Incomplete tasks from meetings', 'Decisions from meetings', and a list of meeting reports. The 'Decisions from meetings' section contains several items with dates and actions, such as 'V.1 Review & Planning Meeting (Sprint 7)' and 'Sprint 7 will take place on 15 Nov 2021 - 29 Nov 2021'.



The screenshot shows a 'Meeting #X: Minutes Template' in Jira. It includes sections for 'Date', 'Participants', 'Goals', and 'Discussion topics'. The 'Discussion topics' section contains a table with columns for 'Subject', 'Participant', and 'Notes'.

Subject	Participant	Notes
Development Process		<ul style="list-style-type: none"> Give an overview of the SW Development Process
Jira SW Tools		<ul style="list-style-type: none"> Presented Jira stacks (Categories) and how we are going to work on issues. We proposed 7 stacks: <ul style="list-style-type: none"> To Do Analysis on issue requires further clarifications from F&AT Development, under development Big items/ bugs found in Testing/UAT need to be fixed

- Finish with decisions and actionable items



Wrap up the session!

PM in Proposal Phase

- Coordinator or Participant
- **The roadmap to participation** in a Horizon Europe proposal
- **Proposal Preparation and Project Management**
- Understanding **how proposal writing works** and how to coordinator or join a consortium





Q&A

Time to ask your
questions!

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