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

Technical Assistance for Turkey in Horizon 2020 Phase-II  
EuropeAid/139098/1H/SER/TR

# Horizon Europe: Overview, Vision, Novelties, Approach

IPR, Legal and Financial Training: Proposal Preparation & Submission

*Odysseas Spyroglou, KE2*

Istanbul, 15-16 Sep 2022

Photo by Christian Lue on Unsplash



REPUBLIC OF TURKEY  
MINISTRY OF INDUSTRY  
AND TECHNOLOGY



# Meet the instructor

Odysseas Spyroglou  
Key Expert 2. Legal, Financial & IPR



- **Innovation consultant** with **engineering, ICT** and **financial** background.
- Over **20 years of working experience** in EU funded projects: preparing proposals, building consortia and managing projects under FP7, CIP, COSME, INTERREG, MED, H2020 and more.
- Specialise in **Project Management & Quality, Intellectual Property** and reengineering **business processes**.
- Designed and delivered more than **300 training sessions** on **Innovation** Management, IPR, Entrepreneurship, Proposal Writing, Project Management, financial administration.

**20+**  
Years

**60+**  
Projects

**90m+**  
Funds



[linkedin.com/in/ospyroglou](https://www.linkedin.com/in/ospyroglou)

# What we will cover

## Legal and Financial Training: Project Implementation



### DAY 1

- Overview of HE changes
- GA Preparation
- Legal Documents
- Cross Cutting Issues
- PM Tools

### DAY 2

- Financial Management
- Project Reporting
- Special Cases
- Closure – Financial Audits

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# The Vision of HE

Where Horizon Europe will focus

A sustainable, fair and  
**prosperous** future for  
**people** and **planet** based  
on European values.

- Tackling **climate change** (35 % of budget)
- Helping to achieve **Sustainable Development Goals**
- Boosting the Union's **competitiveness and growth**



# H2020 vs. Horizon Europe

What are the main changes in structure?

Horizon 2020

Excellent Science	Industrial Leadership	Societal Challenges
European Research Council Future Emerging Tech MCSA Research Infrastructures	ICT // Nano, New-materials // Biotechnology // Space // Access to Risk // SME Innovation	Health // Food // Energy // Transport // Climate // Inclusive Societies // Security

Horizon Europe

Excellent Science	Global Challenges & European Industrial Competitiveness	Innovative Europe
European Research Council MCSA Research Infrastructures	Health // Culture, Creativity // Civil Security // Digital Industry & Space // Climate, Energy // Food, Agri	European Innovation Council European Innovation Ecosystems European Inst. Of Innovation & Tech

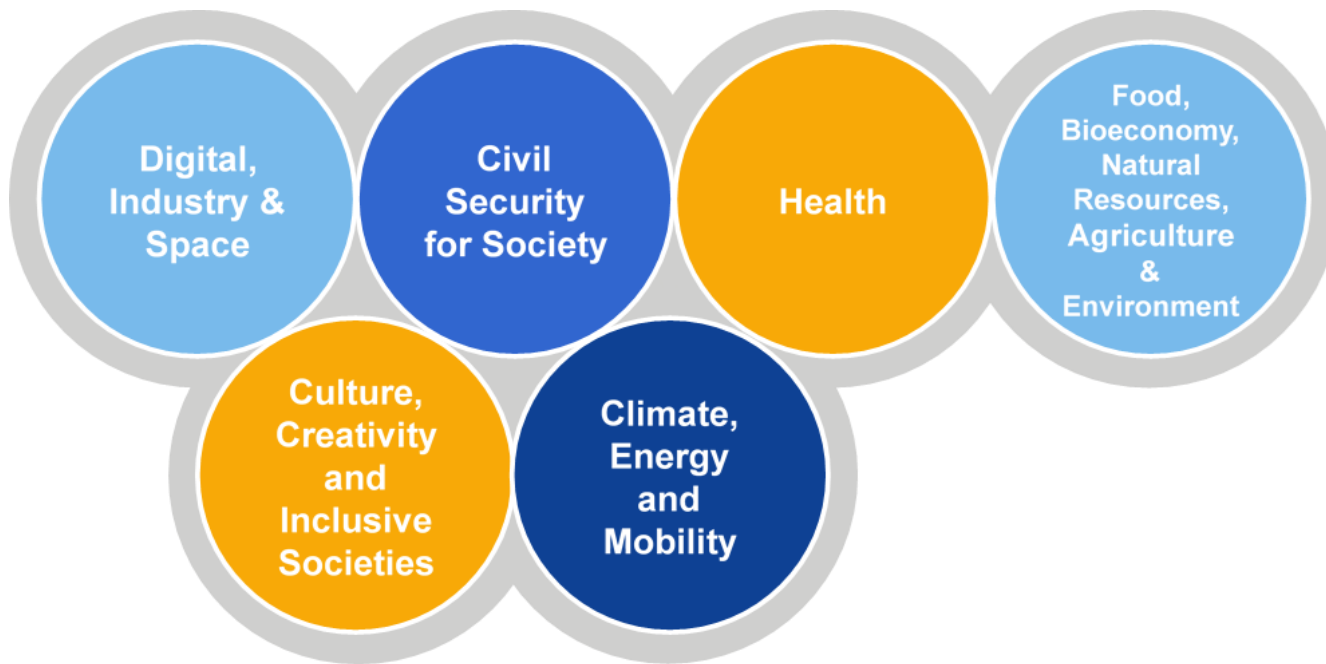
# Pillar 1: Excellent Science

reinforcing and extending the excellence of the Union's science base

European Research Council (ERC)	Marie Skłodowska-Curie Actions (MSCA)	Research Infrastructures (RI)
Frontier research by the best researchers and their teams	Equipping researches with new knowledge and skills through mobility and training	Integrated and inter-connected world-class research infrastructures
Commission proposal: € 16.6 billion	Commission proposal: € 6.8 billion	Commission proposal: € 2.4 billion

# Pillar 2: Global Challenges & European Industrial Competitiveness:

boosting key technologies and solutions underpinning EU policies & Sustainable Development Goals





# Pillar 3: Innovative Europe

stimulating market-creating breakthroughs and ecosystems conducive to innovation

European Innovation Council (EIC)	European Innovation Ecosystem (EIE)	European Institute of Innovation and Technology (EIT)
Support to innovations with breakthrough and market creating potential	Connecting with regional and national innovation actors	Bringing key actors (research, education and business) together around a common goal for nurturing innovation

# Horizontal Action: Widening ERA

Widening Participation and Strengthening the European Research Area

Optimising strengths & potential for a more innovative Europe

## Widening Participation and Spreading Excellence, e.g.

- Teaming & twinning
- ERA Chairs
- COST
- Support to NCPs
- Brain circulation and excellence initiatives
- “Hop-on“

## Reforming and enhancing the European R&I system

- Scientific evidence & foresight
- Open Science
- Policy Support Facility
- Attractive researcher careers
- Citizen science, Responsible Research & Innovation
- Gender equality

Common understanding: At least 3.3 % of Horizon Europe budget



# HE Key Strategic Orientations

Mirroring political priorities of the EU

## A // Digital Transformation

Promoting an open strategic autonomy by leading the development of key digital, enabling and emerging technologies, sectors and value chains to accelerate and steer the digital and green transitions through human-centred technologies and innovations



## C // Sustainable Development

Making Europe the first digitally enabled circular, climate-neutral and sustainable economy through the transformation of its mobility, energy, construction and production systems



Restoring Europe's ecosystems and biodiversity, and managing sustainably natural resources to ensure food security and a clean and healthy environment



## B // Environmental Protection

Creating a more resilient, inclusive and democratic European society, prepared and responsive to threats and disasters, addressing inequalities and providing high-quality health care, and empowering all citizens to act in the green and digital transitions



## D // Resilience & Inclusiveness

Titles outside the boxes are arbitrary, perception of the speaker.

# Digital transformation

Modernising programme administration



## In numbers...

**Evolution in participation between FP7 and Horizon 2020:**

More than **68%** of participants in Horizon 2020 are “newcomers”.

\*Source: Horizon Dashboard - September 2020

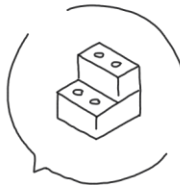
# Co-Design Process

A participatory Design process worth examining



## implement and learn

Are we 'biodegrading' as conveners?  
What messages are we getting, and  
how do we learn from them?

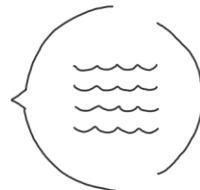
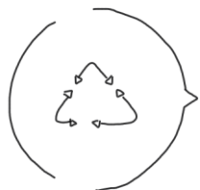


## build the conditions

Are we the right people for this work? Is it needed?  
What's in it for others?  
Who are we working with? What matters to them?  
Who can take part?



What appears promising in the context?



## immerse and align

Should we be doing this?  
What do we already know?  
Who should we partner with?  
Where are the gaps?

## design

How do we build on what is already strong?



## discover

What is happening in the context?  
What is already strong?  
What are people longing for?

<https://www.beyondstickynotes.com/what-is-codesign>



# Co-Design of Strategic Plan

The participatory design process of EC



- Enlarge ownership of the programme
- Optimize effect of HE investments



## 8000 Responses

In Horizon Europe survey,  
(28 June - 4 October 2019)



## Physical (2019) & Online (2020, 2021)

Bringing together policymakers, researchers,  
entrepreneurs & public



# New approaches for impact

Best Target R&I investments to maximize impact

- **European Partnerships:** initiatives of EU – Private and/or Public for joint R&I activities. Co-Funder or Co-Programmed. *Examples:*
  - EP for AI, Data and Robotics
  - EP for Water4all: water security for the planet
  - EP for European Open Science Cloud
- **Missions: new concept.** Address global challenges, ambitious, inspirational, achievable goals.
  - Cancer
  - Adaptation to Climate Change
  - Ocean Seas and Waters
  - Climate Neutral and Smart Cities
  - Soil Health and Food



# R&I Missions

A new approach for impact



Relating EU's research and innovation better to society and citizens' needs; with strong visibility and impact

A portfolio of actions across disciplines intended to achieve a **bold and inspirational and measurable goal** within a set timeframe, with **impact** for society and policy making as well as relevance for a significant part of the European population and wide range of European citizens.

## MISSION AREAS:

Soil health and food



Cancer



Adaptation to climate change, including societal transformation



Climate-neutral and smart cities



Healthy oceans, seas, coastal and inland waters



# CoFunded European Partnerships

A new approach to European Partnerships

New generation of objective-driven and more ambitious partnerships in support of agreed EU policy objectives

## Key features:

- Simple architecture and toolbox
- Common set of criteria
- Coherent life-cycle approach
- Strategic orientation

CLUSTER 1: Health	CLUSTER 4: Digital, Industry & Space	CLUSTER 5: Climate, Energy & Mobility	CLUSTER 6: Food, Bioeconomy, Agriculture,...	EIT (KNOWLEDGE & INNOVATION COMMUNITIES)	SUPPORT TO INNOVATION ECOSYSTEMS
Innovative Health Initiative	Key Digital Technologies	Clean Hydrogen	Circular Bio-based Europe	InnoEnergy	Innovative SMEs
Global Health Partnership	Smart Networks & Services	Clean Aviation	Rescuing Biodiversity to Safeguard Life on Earth	Climate	
Transforming Health Care Systems	High Performance Computing	Single European Sky ATM Research 3	Climate Neutral, Sustainable and Productive Blue Economy	Digital	
Risk Assessment of Chemicals	European Metrology (Art. 185 of the TFEU)	Europe's Rail	Water4All "Water security for the planet"	Food	
ERA for Health	Artificial Intelligence, Data and Robotics	Cooperative, Connected and Automated Mobility (CCAM)	Animal Health and Welfare*	Health	
Rare Diseases*	Photonics	Batteries "Towards a competitive European industrial battery value chain"	Agroecology "Accelerating Farming Systems Transition"	Raw Materials	
One Health / Antimicrobial Resistance*	Made in Europe	Zero-emission Waterborne Transport	Agriculture of Data*	Manufacturing	
Personalised Medicine*	Clean Steel - Low Carbon Steelmaking	Zero-emission Road Transport (2ZERO)	Safe and Sustainable Food Systems*	Urban Mobility	
Pandemic Preparedness* Co-funded or co-programmed	Processes4Planet	People-centric Sustainable Built Environment (Built4People)		Cultural and Creative Industries	
	Globally Competitive Space Systems**	Clean Energy Transition			
		Driving Urban Transitions to a Sustainable Future			

■ Institutionalised Partnerships (Art 185 or 187 of the TFEU)

■ Co-Programmed

■ Co-Funded

\* Calls with opening dates in 2023-24

\*\* Calls with opening dates not before 2022

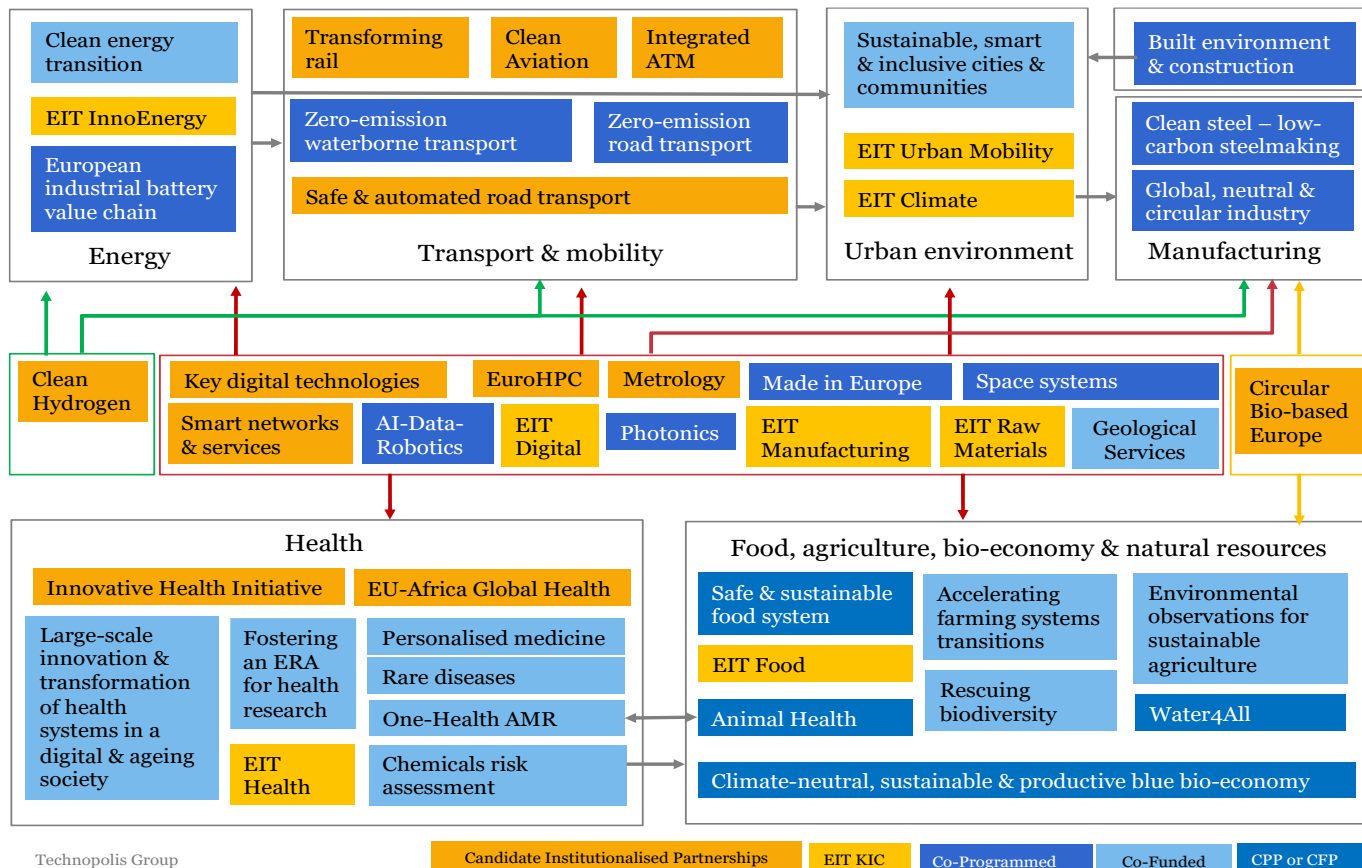


# Overview of European Partnerships

Industry-orientated  
'vertical'  
partnerships

'Horizontal'  
partnerships

Vertical partnerships  
in the societal  
application areas



# International Cooperation

## EU Funding Management Modes

Aligning global efforts  
and investments,  
science diplomacy,  
synergies with EU  
external policy.

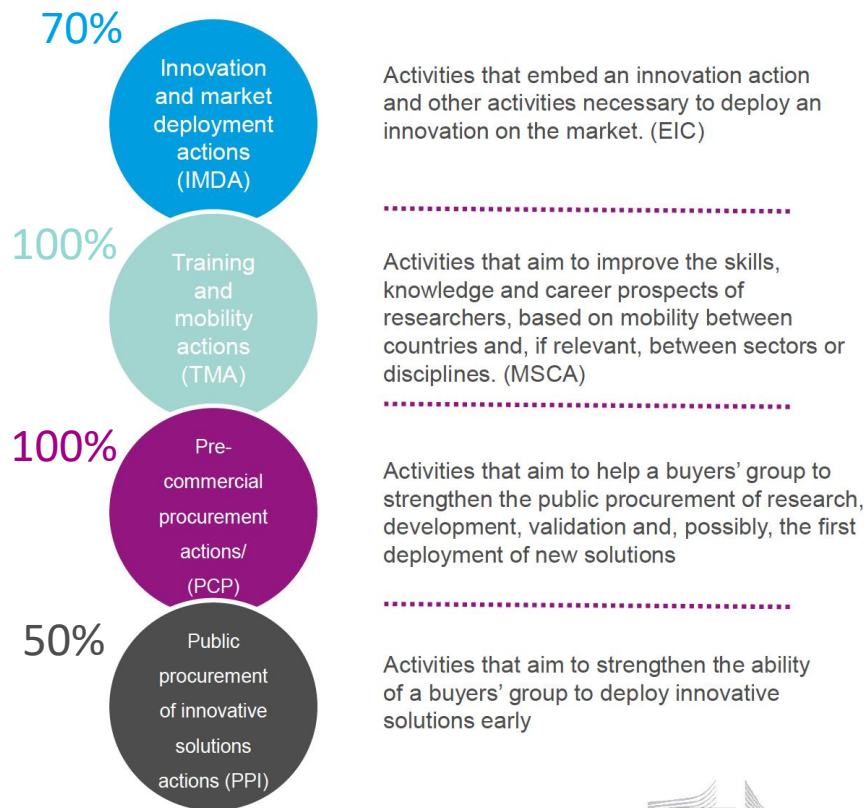
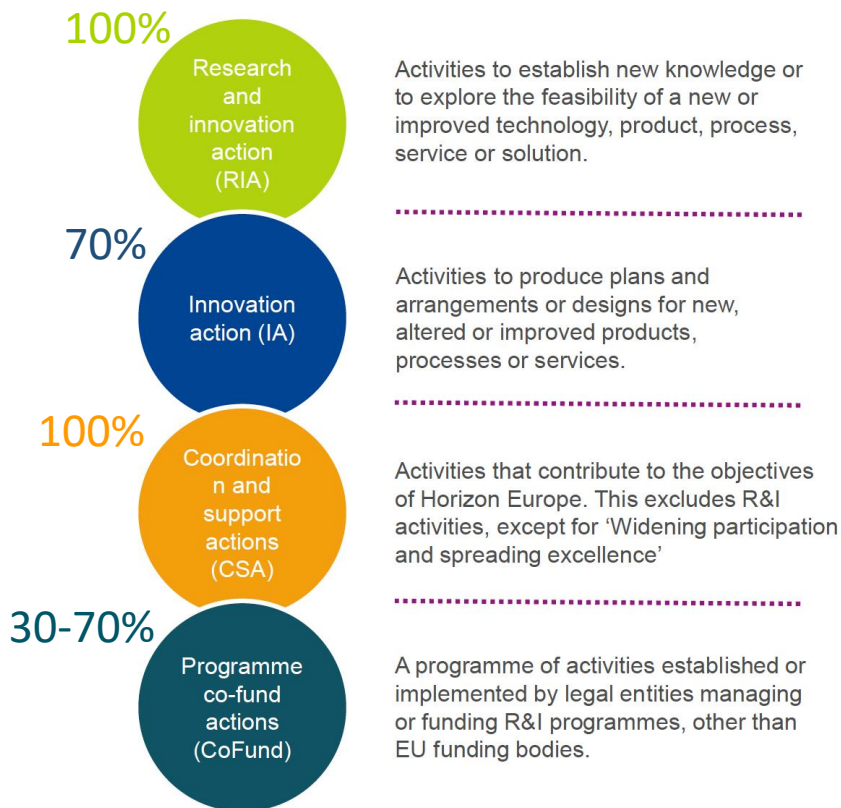
- **Collaborative Research & Innovation Initiatives:**  
projects w/ 3<sup>rd</sup> party countries, regions
- **International Mobility & Cooperation in Frontier Research:** support to brain circulation,  
internationalisation of EU companies (Pillar I, III)
- **EU in Multilateral Alliances:** climate change,  
sustainable food, biodiversity.
- **Policy Dialogues w/ 3<sup>rd</sup> countries, regions:**  
reinforcing strategic level of cooperation R&I,  
Open Science, ethics, safety & quality.



[https://ec.europa.eu/info/research-and-innovation/strategy/strategy-2020-2024/europe-world/international-cooperation\\_en](https://ec.europa.eu/info/research-and-innovation/strategy/strategy-2020-2024/europe-world/international-cooperation_en)

# Types of Actions

## Work Programme 2021-2022 - 13. General Annexes



# The novelties of Horizon Europe

*What changes Horizon Europe brings*



## EIC

Supporting  
breakthrough  
Innovations



## EU Missions

Solutions to Societal  
challenges



## EU

## Partnerships

Focused funding



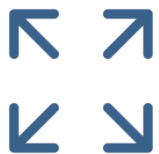
## International Cooperation

Expanding  
possibilities



## Open Science

FAIR Science



## Widening

Increasing R&I  
Participation



## Increased Impact

through Synergies



## Simpler Rules

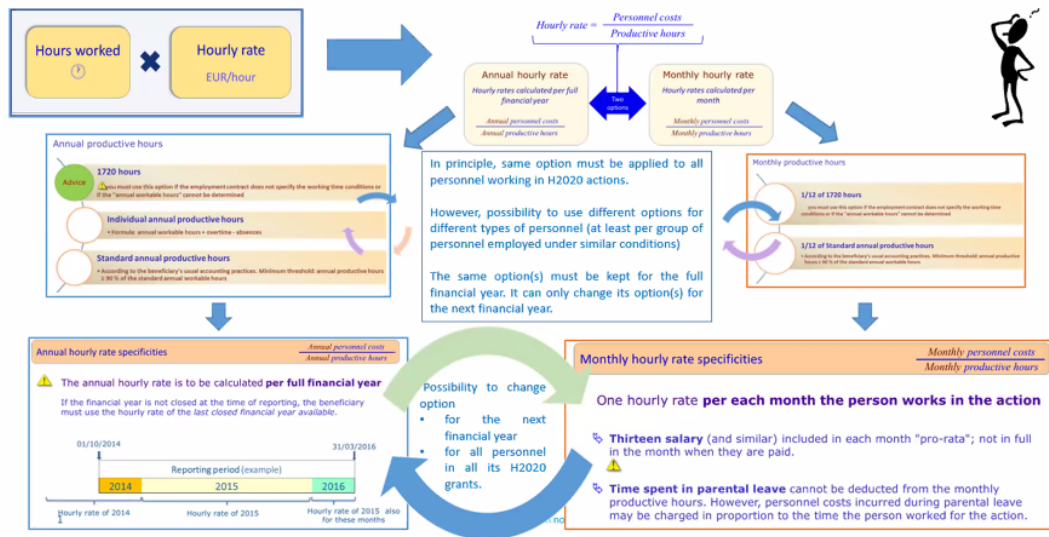
Easier Administration

# Administration Novelties of HE

Changes that affect Implementation

1. Corporate Grant Agreement Template
2. Daily rate approach for personnel costs
3. Internally invoiced goods and services
4. Systems and Process Audits
5. UK participation in Horizon Europe
6. Gender Equality
7. Open Science & other Cross Cutting Issues
8. Lump Sum Projects

## Horizon 2020: a snapshot of the situation

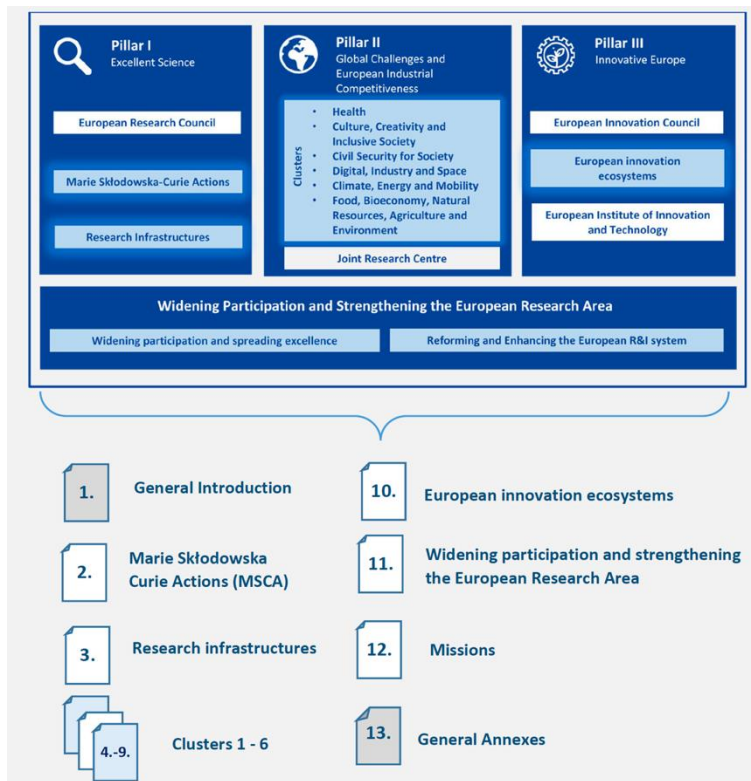


# Horizon Europe: Where to start

HE Work Programme 2023-24

## Work Programme 2023-24

- General Intro
- MSCA
- RI
- 6 Clusters
- EIC
- WIDENING



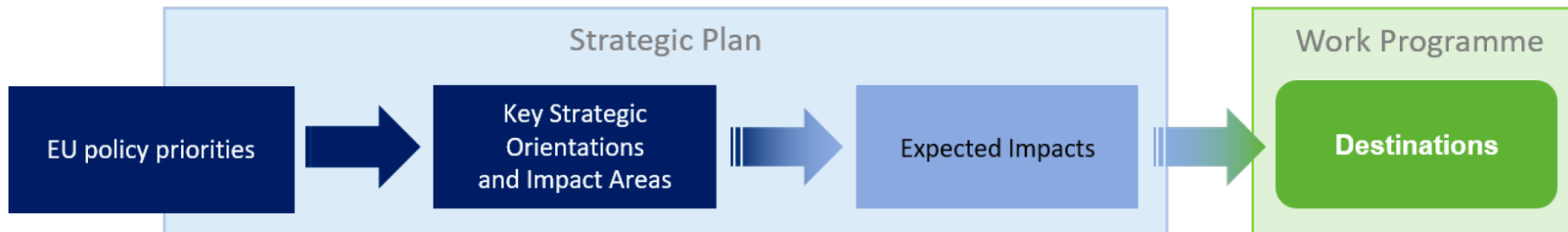
## Documents :

- Strategic Plan 2021-24
- Work Programme 23-24
- Proposal Template
- Model Grant Agreement (MGA)



# Wrap-up: Horizon Priorities for 2021-24

From EU priorities to Work Programme Destinations



6	4	32	3	6	34
Priorities of EU	Key Strategic Orientations	Expected Impacts	Pillars	Clusters	Destinations



# Teşekkür ederim!

## Q&A

Time to ask your  
questions!

# Thank you!

Contact:

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