

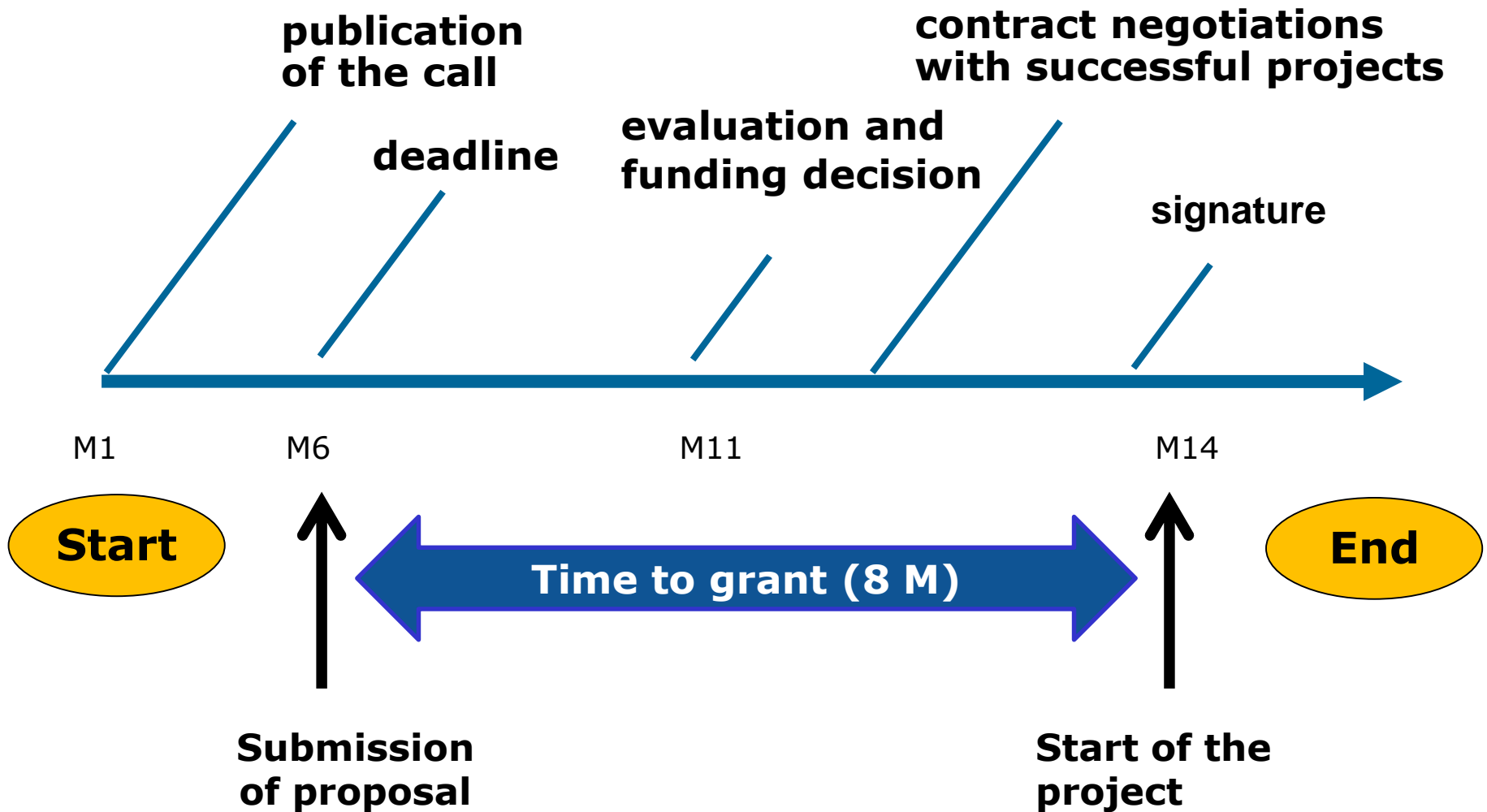
INTRODUCTION TO HORIZON 2020

TECHNICAL MANAGEMENT OF
H2020 PROJECTS

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Time to grant



H2020 R & D Project execution



**Patent search
update**

**Substituting
alternatives**

**Dissemination
of results**

**Knowledge
management**

**Intellectual
property rights**

Technical execution

Scheduling

**Monitoring of
resources**

**Managing risk
and contingency**

**Communication with
partners and EC**

Reporting

**Consortium
management**

Project implementation



EUROPEAN
COMMISSION

Process from the European Commission viewpoint



Objective
Tasks
Deliverables

- Select most promising projects covering strategic priorities according to H2020 rules
- Eligibility
- Evaluation
- Ranking
- Negotiation
- Contract signature
- Ranked list
- Negotiation reports
- Signed grant agreements

- Ensure projects start off, w/o administrative hurdles while focusing on key objectives
- Track progress
- Set up management structure
- Facilitate resolution of contractual and other issues
- Quarterly reports
- Project management database

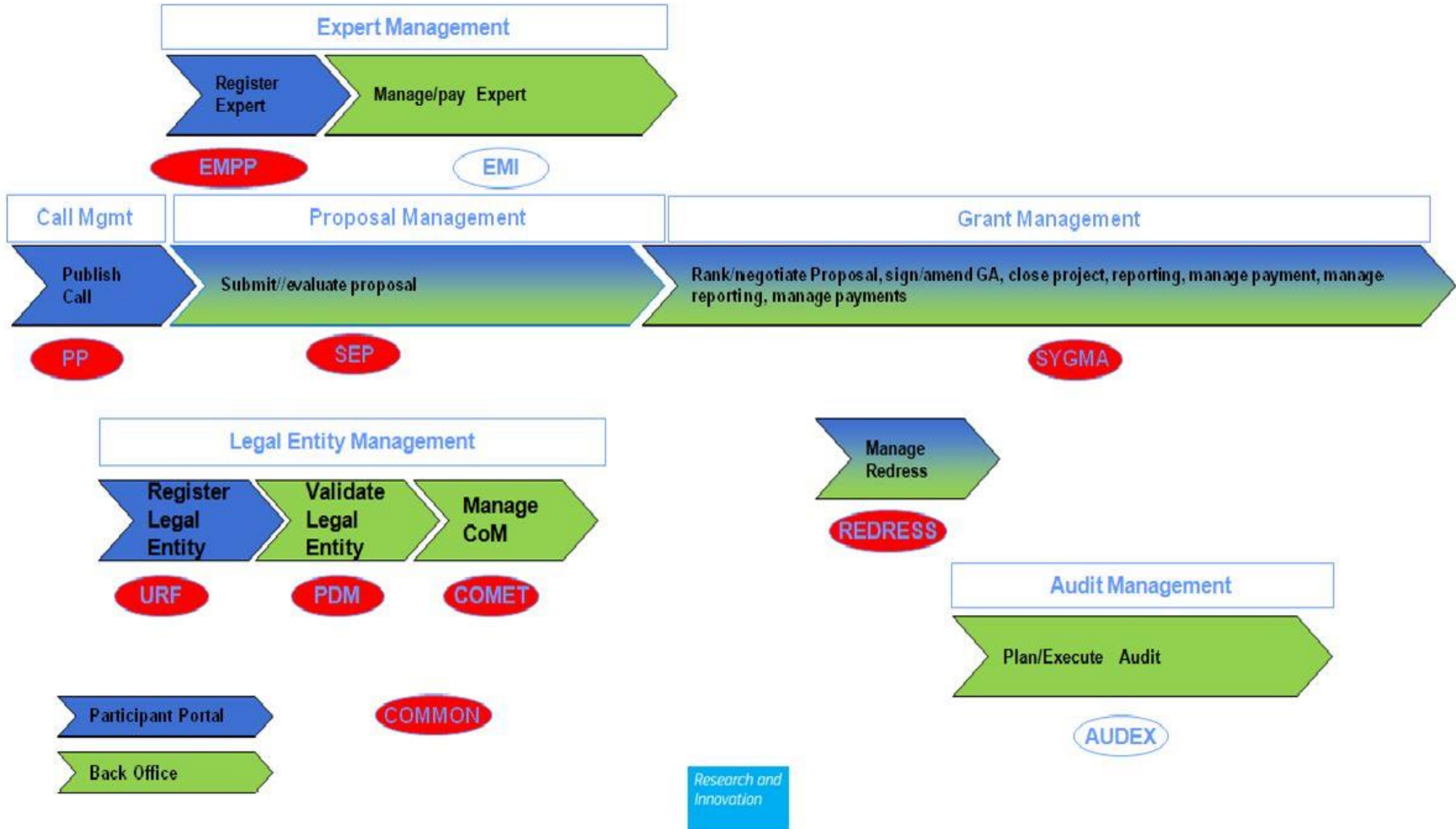
- Ensure project results are maximized
- Continuously assess project results
- Define and implement improvement actions
- Explore synergies
- Project assessment including segmentation
- Project improvement plan

- Ensure project results are optimally used
- Detailed assessment of project
- Define and implement action plan to exploit results
- Lessons learned
- Overall project assessment
- Action plan for exploiting results
- Lessons learned

Project implementation

Process from the EC viewpoint

IT system under Horizon 2020



Project implementation



- Description of the Action (DoA)
 - Partners' tasks and timing
 - Deadlines and expected content of deliverables
 - Milestones
- Budget
- Human resources, equipment, consumables

Description of the Action – main chapters

- Excellence

- 1.1 Objectives

- 1.2 Relation to the work programme

- 1.3 Concept and approach

- 1.4 Ambition

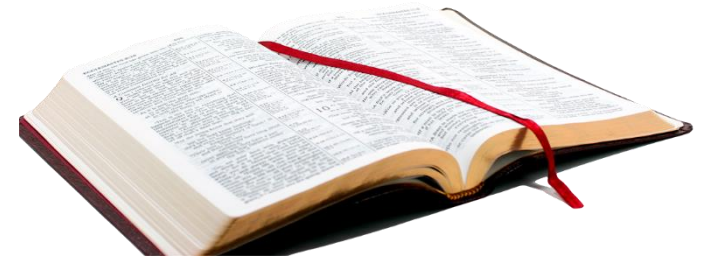
- Impact

- 2.1 Expected impacts

- 2.2 Measures to maximise impact

- a. Dissemination and exploitation of results

- b. Communication activities



Description of the Action – main chapters

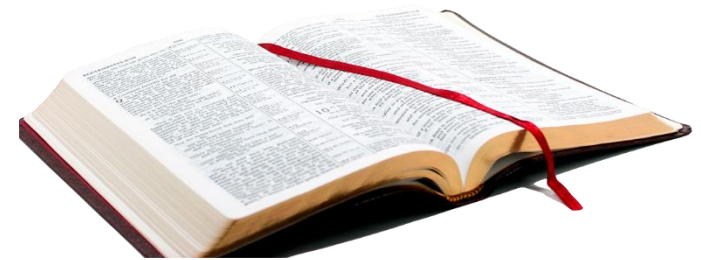
- Implementation

3.1 Work plan — Work packages, deliverables and milestones

3.2 Management structure and procedures

3.3 Consortium as a whole

3.4 Resources to be committed



DoA – Work packages



Work package number		Start Date or Starting Event						
Work package title								
Participant number								
Short name of participant								
Person/months per participant:								

Objectives

Description of work (where appropriate, broken down into tasks), lead partner and role of participants

Deliverables (brief description and month of delivery)

DoA – List of work packages and deliverables

Work package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Person-Months	Start Month	End month
				Total months		



Deliverable (number)	Deliverable name	Work package number	Short name of lead participant	Type	Dissemination level	Delivery date

DoA – List of milestones

Milestone number	Milestone name	Related work package(s)	Estimated date	Means of verification

DoA – Critical risks for implementation

Description of risk	Work package(s) involved	Proposed risk-mitigation measures

DoA – Staff effort

	<u>WPn</u>	WPn+1	WPn+2	Total Person/ Months per Participant
Participant Number/Short Name				
<u>ParticipantNumber/ Short Name</u>				
Participant Number/ Short Name				
Total Person/Months				

DoA – ‘Other direct cost’ items*

Participant Number/Short Name	Cost (€)	Justification
Travel		
Equipment		
Other goods and services		
Total		

Implementation of projects

- Although working plan and review of EC is linear in time, but usage of waterfall development model is not necessary.
- Use of novel software development methodologies (agile, scrum, etc.) is welcome.
- Clear and timely checking points (via deliverables and milestones) are still required.



Critical management steps

- Continuously check the **advancement of project partners** → short weekly meeting may be effective
- Try to find the dead-end directions/ technologies as soon as possible
- Continuously **update risk and mitigation plan**. Critical findings → communicate to the EC project officer
- Take extra (and timely) effort on **system integration**
- Indicate expected **delays** (e.g of deliverables) to the EC project officer

Critical pitfalls

- Unexpected technical/ technology barriers
 - Looking for alternatives → original objectives must be retained
- Underperforming partners, hindering the project execution
- Partner(s) leaving the consortium
 - This may easily lead to suspending the project if critical partner(s) leave
- Unmet deadlines, delays

Always communicate with consortium partners and EC project officer!

Dissemination



- Active communication and dissemination activities are expected
- A “living” project homepage is mostly expected and occasionally checked by project officers
- Promote the results in workshops, conferences, journals, magazines, etc.
- Use the social media for promotions
- Do not forget about using the logo(s) of supporting fund and acknowledgements

Periodic and final reporting

- Summary for publication
 - 1.1 Summary and overall objectives of the project
 - 1.2 Work performed during the and main results achieved so far
 - 1.3 Progress beyond the state of the art and expected potential impact



Deliverables

Del. no.	Deliverable name	WP no.	Lead beneficiary	Type	Dissemin. level	Delivery date from Annex 1	Actual delivery date	If deliverable not submitted on time: Forecast delivery date if appropriate	Status	Comments
[insert deliverable number]	[insert deliverable name]	[insert WP number]	[insert beneficiary short name]	[R] [DEM] [DEC] [OTHER]	[PU] [CO] [CI]	[insert month number]	[insert dd/mm/yyyy]	[insert dd/mm/yyyy]	[Not submitted] [Request for revision] [Not assessed yet] [Not valid] [Accepted]	[insert comments]

Milestones

Milest. no.	Milestone title	Related WP(s) no.	Lead beneficiary	Delivery date from Annex 1	Means of verification	Achieved	If not achieved Forecast achievement date	Comments
[insert MS number]	[insert milestone name]	[insert WP number]	[insert beneficiary short name]	[insert dd/mm/yyyy]	[insert means of verification as in Annex 1]	[YES] [NO]	[insert dd/mm/yyyy]	[insert comment if needed]

Ethical issues

Ethic requirements	Due date of the compliance of the ethic requirement	Report of the independent ethics advisor/ advisory board if applicable	Comments
[insert requirement as in Annex 1]	[insert dd/mm/yyyy]	[Not submitted] [Submitted]	[insert comment]

Critical implementation risks and mitigation actions

Foreseen Risks

Risk Number	Description of Risk	Work Packages Concerned	Proposed risk-mitigation measures
[insert risk number as in Annex 1]	[insert risk description as in Annex 1]	[insert WP number]	[insert mitigation measure as in Annex 1]

Unforeseen Risks

Risk Number	Description of Risk	Work Packages Concerned	Proposed risk-mitigation measures
[insert unforeseen risk number]	[insert risk description]	[insert WP number]	[insert mitigation measure]

States of the Play for Risk Mitigation

Risk Number	Period	Did you apply risk mitigation measures?	Did your risk materialise?	Comments
[risk number]	[period number]	[YES] [NO]	[YES] [NO]	[insert comment if needed; mandatory if the risk mitigation measures have not been applied]

Dissemination and exploitation of results

Scientific publications



Type of scientific publication	Title of the scientific publication	DOI	ISSN or eSSN	Authors	Title of the journal or equivalent	Number, date	Publisher	Place of publication	Year of publication	Relevant pages	Public & private participation	Peer-review	Is/Will open access provided to this publication
[Article in journal] [Publication in conference proceeding/workshop] [Books/Monographs] [Chapters in books] [Thesis/dissertation]	[insert title of the publication]	[insert DOI reference]	[insert ISSN or eSSN number]	[insert authors' name(s)]	[insert title of the journal]	[insert number of the journal] [insert month of the publication] [insert year of the publication]	[insert name of the publisher]	[insert place of publication]	[insert year of the publication]	[insert first page of the publication] - [insert last page of the publication]	[YES] [NO]	[YES] [NO]	[Yes - Green OA [insert the length of embargo if any]] [Yes - Gold OA [insert the amount of processing charges in EUR if any]] [NO]

Dissemination and communication activities

Type of dissemination and communication activities	Number
<p>[Organisation of a Conference]</p> <p>[Organisation of a workshop]</p> <p>[Press release]</p> <p>[Non-scientific and non-peer reviewed publications (popularised publications)]</p> <p>[Exhibition]</p> <p>[Flyers training]</p> <p>[Social media]</p> <p>[Web-site]</p> <p>[Communication campaign (e.g radio, TV)]</p> <p>[Participation to a conference]</p> <p>[Participation to a workshop]</p> <p>[Participation to an event other than a conference or workshop]</p> <p>[Video/film]</p> <p>[Brokerage event]</p> <p>[Pitch event]</p> <p>[Trade fair]</p> <p>[Participation in activities organised jointly with other H2020 project(s)]</p> <p>[Other]</p>	<p>[insert number of activities]</p>
<p style="text-align: right;">Total funding amount</p>	<p>[insert amount in EUR]</p>



Intellectual property rights resulting from the project

- Summary of IPR protection activities, e.g. patents, trademarks, etc.

Gender of R&D participants

Beneficiaries	Number F including third parties (if appropriate)	Number M including third parties (if appropriate)	Total Including third parties (if appropriate)
[insert name of beneficiary]	[insert number]	[insert number]	[insert number]

Periodic and final reporting

1. Explanation of the work and overview of the progress

1.1 Objectives

1.2 Explanation of the work carried per WP

1.3 Impact

How the project results confirm the expected impacts (section 2.1 of the DoA).



Periodic and final reporting

2. Update of plan for exploitation and dissemination of result
3. Update of data management plan
4. Follow-up of recommendations and comments from previous review(s)
5. Deviations from Annex 1

5.1 Tasks

5.2 Use of resources

Unforeseen subcontracting (if applicable)

Unforeseen use of in kind contribution from third party against payment or free of charges

Closing of project



After closing the project, do not forget to retain all the related documents because EC may carry out technical and financial audits.





HORIZON 2020

**Thank you
for your attention!**

Find out more:

<http://ec.europa.eu/programmes/horizon2020>