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TRAINING COURSE
«A Practical Approach on Horizon 2020 Grant Writing»



«A Practical Approach on Horizon 2020 Grant Writing»

DAY 1

Duration: 9h00 to 16h30

Coffee breaks: 10h30 to 11h00 | 15h10 to 15h30

Lunch break: 12h30 to 13h30

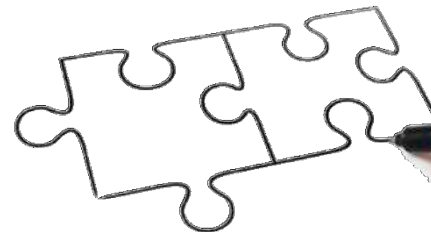
Overview of Horizon 2020

- Structure of H2020: the main 3 pillars
 - > Excellent Science (ERC, FET, Marie Curie Actions, Research Infrastructures)
 - > Competitive Industries
 - > Tackling Societal Challenges
- Terminology and General Rules. Number of participants (**Exercise: Eligibility of consortia**)
- Types of costs and funding percentage (%). Co-financing rates
- H2020 calls for proposals and Work Programmes for 2014-2015
- Funding schemes in H2020 (funding instruments):
 - > Research and Innovation Actions (RIA), Innovation Actions (IA), Coordination and Support Actions (CSA), COFUND Actions, Pre-Commercial Procurement (PCP), Public Procurement of Innovative Solutions (PPI), Marie Curie Actions, Prizes, Future and Emerging Technologies (FET)
 - > Characteristics of each instrument and funding percentage rate (%)
 - > **Exercise: selection of funding schemes for a given project idea**

How to prepare a successful proposal for Horizon 2020

- The entire process of proposal preparation
- How proposals will be evaluated in H2020. How to become an evaluator
- Fitting a project idea in the adequate topic / call for proposal (**Exercise: H2020 topic identification**)
- Practical tips and advices for proposal preparation
- The EU Research and Innovation Participation Portal (**Exercise: finding topics and calls for proposals**)
- H2020 application forms (**Exercise: distinguishing proposal templates according to H2020's types of projects**)
 - > Part A: administrative documentation
 - > Part B: technical part – the real proposal
 - Section 1: Excellence (**Exercise: formulating SMART objectives**)
 - Section 2: Impact
 - ✓ Analysis of its requirements and respective sub-sections
 - ✓ Dissemination requirements and Open Access
 - ✓ Exploitation and Transferability: assuring H2020's success
 - Section 3: Implementation (Management)

- **Example of a Horizon 2020 proposal prepared by Octopux to a client**



Several hands-on-approach exercises are introduced for each training topic throughout the workshop.



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DAY 2

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Lunch break: 12h30 to 13h30

Intellectual Property Rights in Horizon 2020

- The IPR Model by defect
- How to deal with IPR issues during the proposal writing stage
- How to deal with IPR issues in the Consortium Agreement
- Common problems with IPR in a EU-funded project
- **Real life examples of IPR protection**

Financial rules in Horizon 2020 and cost reporting

- Important definitions
- The concept of simplification
- Eligible costs and funding rates per type of project
- Direct and indirect costs: cost categories
- Costs for subcontracting, in-house consultants and third parties
- Costs for SME owners without a salary, full-time and part-time personnel

Managing successfully a Horizon 2020 project

The different phases of Project Management

Negotiating the Grant Agreement

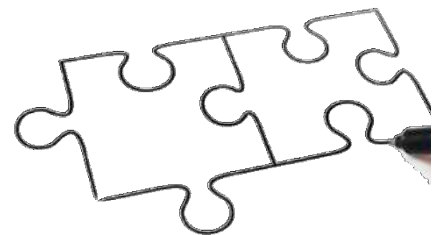
Administrative and Financial Management in Horizon 2020

> **Exercise: filling a Financial Statement (Form C) and Record of Project Expenses**

- Audit certificates (ex-ante audits)
- Facing an *ex-post* audit from the European Commission through the European Court of Auditors
- > **Examples of documents to be filled and delivered**
- How to build a budget in Horizon 2020. (**Exercise: building a budget for an Innovation Action**)

FINAL WORKSHOP: Designing a Horizon 2020 project proposal

- Introduction to the proposed case
- Matching project ideas with given topics of calls for proposals
- Brainstorming and proposal drafting according to H2020's requirements



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THE EXPERT



Daniela S. Gomes

*Entrepreneur | CEO at Octopux Consulting (Headquartered in Brussels | Branch office in London)
Proposal Writer and Project Manager | Project Evaluator and Lecturer of EU Funding & Project Management*

- Bachelor in International Security and Intelligence (Technical University of Lisbon, Portugal)
- Post-Graduation in European and Commercial Law (Vrij Universiteit Brussel, Belgium)
- Master in EU Funding and Project Management (Université Catholique de Louvain, Belgium)
- 9+ years proactively involved in the sector of International and EU Affairs such as International Diplomacy, Commercial Lobbying and Public Relations, EU Funding for Research and Innovation, and EU tenders.
- Specialist in project writing, review and management from EU Procurement and from European Research and Innovation programmes such as: the **Seventh Framework Programme (FP7)**, **Competitiveness and Innovation Programme (CIP)**, **Entrepreneurship and Innovation Programme (EIP)**, Eurostars from EUREKA, **Horizon 2020** and **SME Instrument**.
- Daniela Gomes and her team have assisted several of her clients and business partners, both from the private and public sector, obtaining more than EUR 10 million out of these funding programmes through successful EU applications.
- Only since July 2013, Daniela has provided professional training both in Brussels and overseas about EU Funding for Research and Innovation (Proposal Writing and Project Management) for more than 1000 professionals from EU and non-EU countries, such as Canada, United States of America, Mexico, Armenia, Turkey, Serbia, Zambia, Norway, Iceland, Ecuador, South Africa, etc.
- Since the beginning of 2014, Daniela Gomes and her team have been preparing and submitting project proposals, mostly under Horizon 2020 (collaborative projects) and the SME Instrument, as well as managing administratively and financially approved projects on behalf of EU and non-EU clients