

Negotiate your interests in a consortium

Horizon Europe skills training

Session 3.

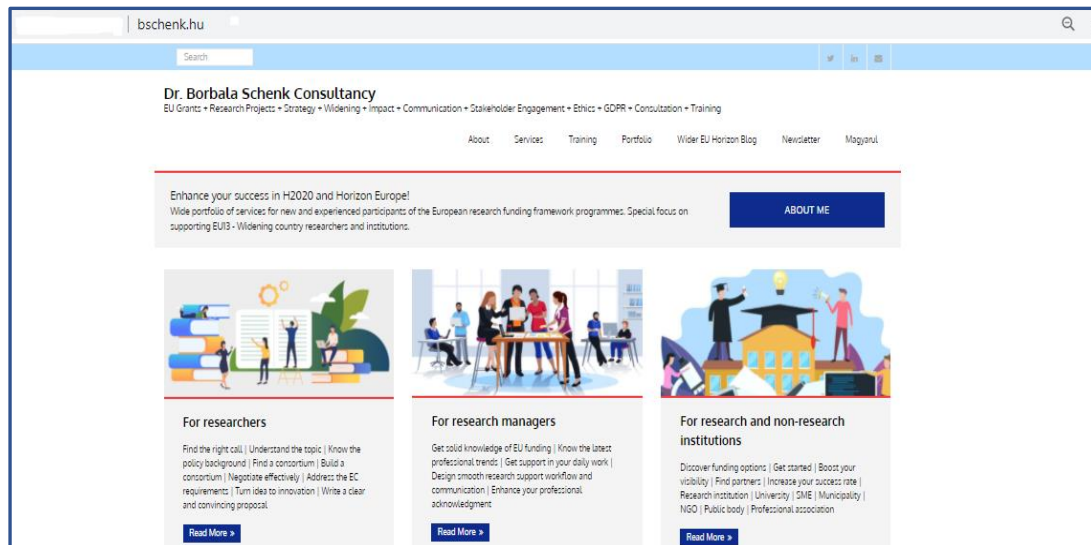
Dr. Borbala Schenk

European Research Funding Advisor

Corvinus University Budapest | Centre for Horizon Europe

February 8, 2021

dr. Borbála Schenk



<http://bschenk.hu>

- Advisor specialized in European research funding framework programmes (H2020, Horizon Europe)
- Proposal writing, development and quality assurance experience in various EU funding schemes (Widening Participation, Societal Challenges, MSCA ITN, MSCA RISE, FET-Open, Science with and for Society, COST, Erasmus+)
- In 2020 contributed to 3 winning projects and 1 with reserve list status, record of multiple impact sections with maximum scores
- Since 2018 trainings on research management and proposal writing in 5 countries for researchers and research managers
- Board-member of the European Association of Research Managers and Administrators, responsible for liaising with the European Commission
- Core Group Member of ERION network, a Europe-wide community for professionals in Research Ethics, Research Integrity and GDPR issues.
- Lawyer by degree, 15+ years of experience in research and university environments, having held management, lecturing and editorial positions

Tasks and questions → slido.com



A screenshot of the Slido website homepage. The browser address bar shows 'https://www.slido.com'. The navigation menu includes 'Product', 'Solutions', 'Pricing', 'Resources', 'Enterprise', 'Log In', and a green 'Quick event' button. The main content area features a green heading 'Joining as a participant?' with the subtext 'No account needed.' Below this is a text input field with a green arrow button. To the right, a large banner image shows a laptop displaying a Slido poll and a video conference grid, with the text 'The ultimate Q&A and polling platform for virtual trainings!' and buttons for 'Try it free' and 'Schedule a demo'.

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Preparation for Horizon Europe

Module II. Skills training (February 1 – 16)

- Finding partners for Horizon Europe projects (February 1-2)
- Pitching your research idea (February 3-4)
- **Negotiate your interests in a consortium (February 8-9)**
- **Navigate your way through the Consortium Agreement and the Grant Agreement (February 10-11)**
- Dissemination, exploitation and communication in Horizon Europe (February 15-16)

Negotiate your interests in a consortium throughout the project lifecycle



1. Joining a consortium

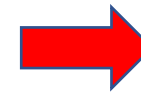
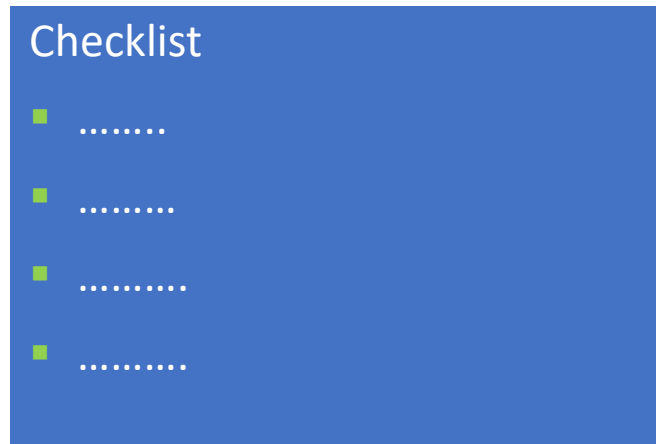
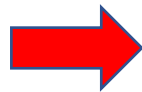
Tasks

- Identifying in the project (which WP, which Task)
- Negotiating the allocated budget

Strategic interests

- Securing a role adequate to your expertise and interest
- Assuring budget is adequate to the tasks

Dear Professor...
please find attached
the allocated budget to
Corvinus University for
the GREENFROG project
We look forward to
your reply.



What I want to do

What I can do

What I cannot let happen

Adequate budget for the tasks in the project

- timing of the different work packages and their components (Gantt chart or similar);

Table 3.1b: Work package description

For each work package:

Work package number							Lead beneficiary	
Work package title								
Participant number								
Short name of participant								
Person months per participant:								
Start month							End month	

Objectives

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

Deliverables (brief description and month of delivery)

Tables for section 3.4

Table 3.4a: Summary of staff effort

Please indicate the number of person/months over the whole duration of the planned work, for each work package, for each participant. Identify the work-package leader for each WP by showing the relevant person-month figure in bold.

	WPn	WPn+1	WPn+2	Total Person-Months per Participant
Participant Number/Short Name				
Participant Number/Short Name				
Participant Number/Short Name				
Total Person Months				

Table 3.4b: 'Other direct cost' items (travel, equipment, other goods and services, large research infrastructure)

Please complete the table below for each participant if the sum of the costs for 'travel', 'equipment', and 'goods and services' exceeds 15% of the personnel costs for that participant (according to the budget table in section 3 of the proposal administrative forms).

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

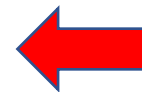
2. Preparing the proposal

Tasks

- Contribute to the proposal preparation (WP, feedback)
 - Provide administrative information
 - Negotiating the allocated budget
 - Management procedure
- **Follow your proposal:** Horizon 2020 actions (i.e. projects) must be implemented in accordance with the assessed proposal. The grant agreement must not differ from the proposal. This is without prejudice to corrections needed
 - as a result of an ethical review or security scrutiny
 - to ensure the project conforms to the applicable rules, e.g. legal and financial rules
 - to remove clerical errors or clear inconsistencies
 - when, under exceptional circumstances, a participant is removed from a consortium during grant preparation

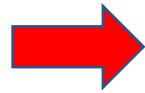
Strategic interests

- Make sure your interest and expertise is adequately reflected in the proposal
- Make sure you implement the tasks you have the expertise for
- Assuring your budget is adequate to the tasks
- Management structure, IPR – make sure it reflects your interests
- Prove to be a reliable partner in the proposal preparation phase



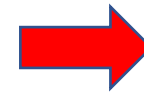
2. Preparing the proposal

Dear Partner,
please find attached
the proposal for the
GREENFROG project,
Please provide
feedback till 15th
February 1PM.
Best regards,
...
Coordinator



Checklist

-
-
-
-



What I want to do

What I can do

What I cannot let happen

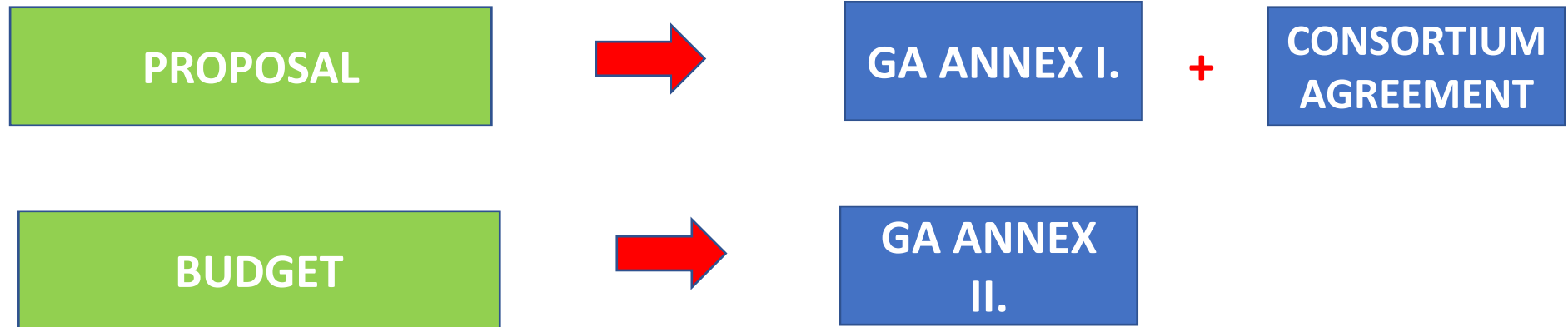
3. Grant preparation phase

Tasks

Submitting the required administrative information
Negotiating the Consortium Agreement

Strategic interests

Indicate if any changes needed
Fulfill admin tasks on time
Active participation in CA preparations



4. Project implementation phase

Tasks

- Completing tasks, producing deliverables
- Participate in the day-to-day operation of the project
- Participate in communication and dissemination
- Submit internal reports and report to the EC
- Participate in whatever the EC requires from the Consortium (e.g. Ethics)

Joint technical responsibility

Individual financial responsibility

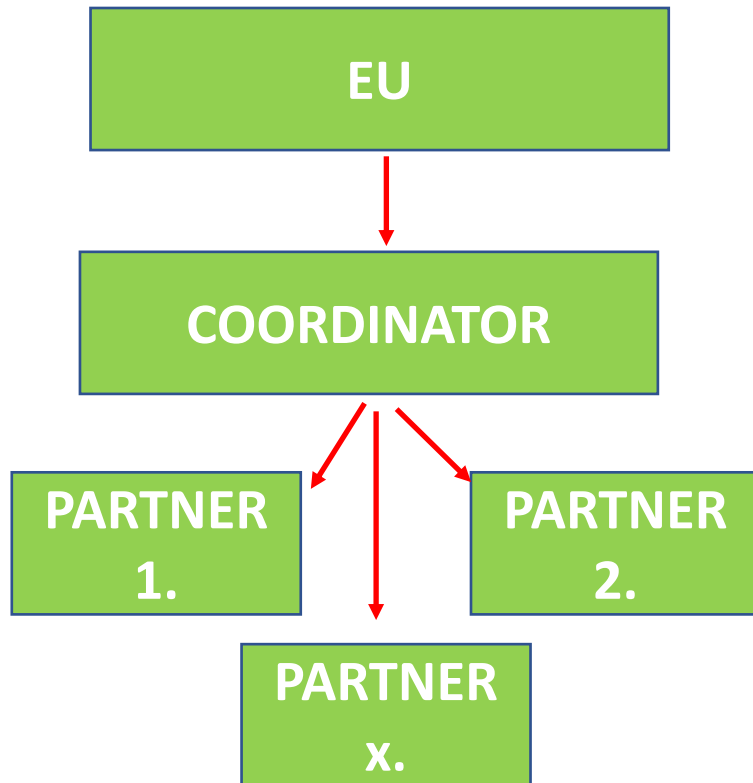
Strategic interests

- Submit reports on time and be precise
- Inform the coordinator in time about foreseen changes (tasks, deliverables, deadlines, budget if necessary)
- Instead of making mistakes, ask questions
- Participate in meetings

Cooperate and communicate

EU payments in H2020 projects

H2020 and Horizon Europe funding: cost reimbursement



**Pre-financing –
the start of the project**

**Interim payments –
reporting periods**

**Final payment –
final report**

2. Grant implementation phase – your personal risk assessment

What can go wrong?	What should I do?

5. Closing the project and beyond

Tasks

- Submission of final report
- Final meeting
- Follow-up on exploitation

Strategic interests

- Submit report on time
- Cooperate in exploitation activities
- Negotiate new projects

Negotiate your interests in a consortium throughout the project lifecycle



Practical tips for negotiations

1. Be confident. Even if you are a partner with a smaller budget share, you bring value to the consortium and you are a partner of equal standing.
2. Your institution is behind you, make sure you consider its interests as well.
3. Even if you are in good personal terms with the Coordinator or the beneficiaries, the rules have to be negotiated, agreed on written down and kept.
4. Make well thought-through decisions as they will have an effect for several years on several people.
5. You are not alone. Ask for the assistance of the research support staff.

What I want to do:

What I can do:

What I cannot let happen:

KUTATÁSMENEDZSMENT IRODA
CORVINUS HORIZONT EURÓPA KÖZPONT / CORVINUS CENTRE FOR HORIZON EUROPE

Kutatási, konzorciális pályázatokat támogató csoport:
Célunk, hogy a Corvinus ki tudja használni a HE lehetőségeit és a kutatási témák, ötletek nemzetközi szintű kutatásokká formálódjanak



Dr. Cser Erika
Szakmai koordinátor



Fekete Judit
Horizon Információs Pont



Dr. Schenk Borbála
jogász, európai uniós
kutatástámogatási tanácsadó
(szerződéses partner)

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I wish you success in Horizon Europe and thank you for your attention and participation!

Your opinion matters. Please send me your feedback on the course via slido