

TRAINING CATALOGUE

EU CORE
European Cooperation in
Research and Education

ENGLISH VERSION

AR Cippitani
Di Gioacchino
Iozzolino
Studio Legale e Commerciale



TRAINING AND CAPACITY-BUILDING ACTIVITIES

EU CORE Consulting (**EU**ropean **CO**operation in **R**esearch and **E**ducation) is a private company which offers consultancy services in project design, project management, reporting, evaluation and partner search in the framework of national, European and international funding programmes.

Born from the 20-year-long experience of the Studio Legale e Commerciale Associato “Cippitani, Di Gioacchino & Iozzolino”, which since 1996 has been providing consulting, training, auditing, financial certification and administrative management services for EU-funded projects, EU CORE was established back in 2007. Since then, EU CORE has actively worked in the elaboration and implementation of international research and cooperation projects, in close collaboration with a broad array of research institutions, university scientific departments and international relations offices, foundations, private companies and local authorities.

Building on its direct involvement in the development and implementation of successful projects, EU CORE has developed a wide range of training courses aimed at equipping participants with the key competences needed to independently design and manage successful projects in the framework of complex funding programmes. Over the past decade EU CORE has become a leading training provider: since the beginning of the 2014-2020 programming period, EU CORE has successfully organised more than 100 courses and trained on average over 800 people per year.

All the courses delivered by EU CORE are held by professionals with years-long experience in the specific fields covered by the courses – both in terms of teaching and practice in designing and implementing cooperative projects.

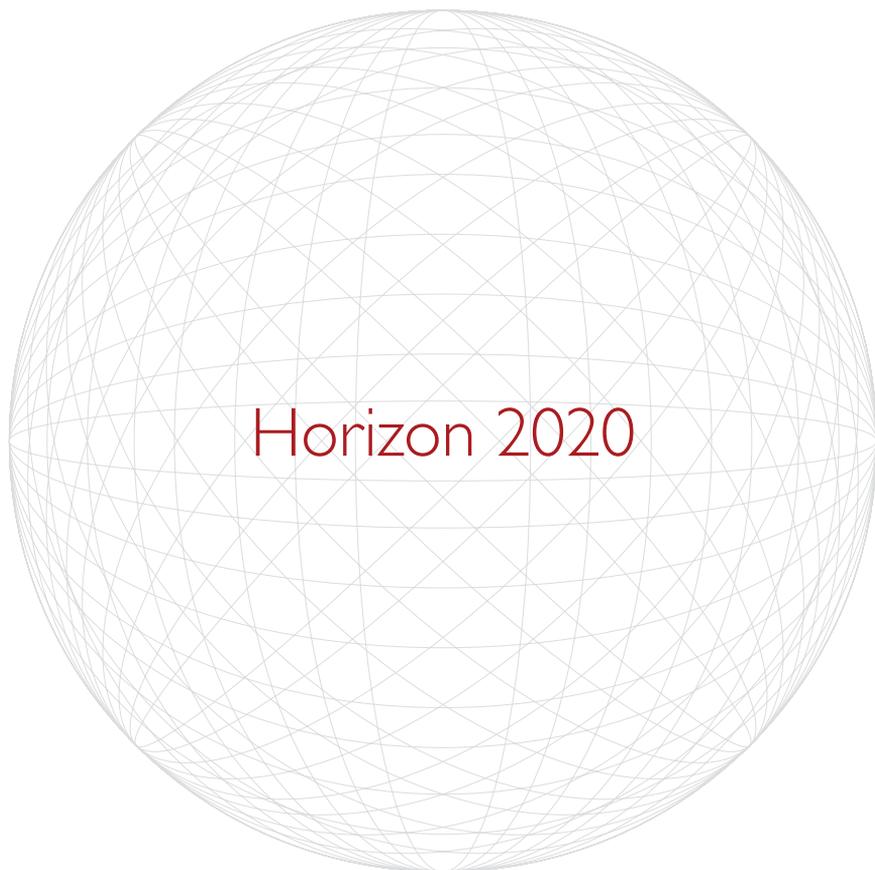
EU CORE's training approach combines a solid theoretical framework with a practical perspective, frontal lectures with real case studies and laboratories, encouraging active involvement of participants in open discussions on any problematic issues encountered in practice.

In addition to the busy schedule of open enrolment training activities – typically held in the cities of Rome, Milan and Turin (cfr. <http://www.eucore.eu/training-courses>) – EU CORE, upon request of national and international clients, organises in-house seminars at their own premises, tailoring the agenda of each course to the needs of the client.

In the following pages, you will find a complete overview of the training / capacity-building modules that EU CORE proposes.

TABLE OF CONTENTS

HORIZON 2020	7
Horizon 2020: how to design a successful project proposal	8
Marie Curie Actions: how to design a successful proposal, with particular reference to Innovative Training Networks (ITN) calls	9
European Research Council (ERC) grants: how to design a successful proposal	10
H2020 SME Instrument: how to design a successful proposal	11
Horizon 2020: project management and financial reporting	12
Project management and financial reporting of Horizon 2020 projects – Advanced course	13
How to deal with the audits of the European Commission within FP7 and Horizon 2020	14
Project management and financial reporting of Marie Curie and ERC Actions	15
The Consortium Agreement and the management of Intellectual Property Rights in Horizon 2020	16
Knowledge transfer in Horizon 2020	17
Ethics issues in Horizon 2020 projects	18
OTHER EUROPEAN UNION FUNDING PROGRAMMES	21
LIFE 2014-2020: how to design a successful project proposal	22
Funding opportunities in the socio-economic sciences and the humanities	23
Writing a successful proposal for INTERREG MED project calls	24
Project management and financial reporting of LIFE projects	25
Project management and financial reporting of Erasmus+ projects	26
THE EUROPEAN STRUCTURAL AND INVESTMENT FUNDS	29
Management and financial reporting of projects funded by the European Structural and Investment Funds ...	30
Synergies between European Structural and Investment Funds, Horizon 2020 and other EU programmes ...	31
CROSS-CUTTING PROBLEMATIC ISSUES ENCOUNTERED BY UNIVERSITIES IN THE MANAGEMENT OF EU-FUNDED PROJECTS	33
Agreements between universities for the issuing of joint degrees and for the participation in EU funding programmes	34
BUSINESS INNOVATION ACTIVITIES	37
Creating and managing a spin-off company: from idea to practice	38



HORIZON 2020: HOW TO DESIGN A SUCCESSFUL PROJECT PROPOSAL



DURATION

16-20 hours



TARGET PARTICIPANTS

Personnel of universities, public and private research centres, enterprises and public authorities, as well as individual researchers interested in submitting project proposals in the framework of Horizon 2020 and particularly within the *Societal Challenges and Industrial Leadership* pillars.



LEARNING GOALS

This course aims at conveying the main project design techniques by providing participants with key tools and tips to build successful project proposals in Horizon 2020, by means of in-depth frontal lectures coupled with practical exercises and laboratories. The thorough analysis of the latest Horizon 2020 proposal templates will allow participants to acquire the competence needed to complete the administrative, technical and financial sections of the proposals.

Examples of filled-in sections of proposal templates will be distributed to participants during the practical exercises, to help them acquire basic notions for successful project elaboration and to equip them with ready-to-use and easy-to-adapt material for designing future H2020 proposals.



MAIN CONTENTS

- Short introduction to Horizon 2020 and presentation of the main Types of Action
- Analysis of the structure of the calls for proposals and hints to quickly identify suitable calls
- Functioning of the Participant Portal Submission Service (PPSS)
- Partner search utilities: practical tips to find relevant project partners
- Filling in the Administrative Forms: data of partners, ethics issues and supporting documents
- How to prepare an appropriate project budget, through
 - a. frontal lectures providing the theoretical knowledge essential to build up an eligible project budget
 - b. guided exercise on the elaboration of a project budget
- Introduction to project design: main elements of a project and design techniques
- Indications to build up the Technical Annex of the proposal: guided analysis of the templates, focusing in particular on:
 - a. planning project design
 - b. identification of project objectives, expected results and implementation methodology
 - c. identification and description of the project impacts, as well as of the tools and methods for successfully disseminating and exploiting project results
 - d. definition of Work-packages, tasks, timeline and Deliverables
 - e. identification of risks and of appropriate contingency measures
 - f. identification of indicators, Milestones and related sources of verification
 - g. design of adequate consortium management structures and procedures – including relevant mechanisms to ensure effective innovation management
 - h. description of the consortium, of each partner's key features, as well as of the strengths and complementarities of the partnership as a whole
- Evaluation criteria for H2020 project proposals.

MARIE CURIE ACTIONS: HOW TO DESIGN A SUCCESSFUL PROPOSAL, WITH PARTICULAR REFERENCE TO INNOVATIVE TRAINING NETWORKS (ITN) CALLS



DURATION

8 hours



TARGET PARTICIPANTS

Researchers or administrative personnel within universities, research centres or private enterprises interested in taking part in the Marie Skłodowska-Curie Actions of Horizon 2020.



LEARNING GOALS

This course aims at providing participants with key tools and tips to build successful Marie Curie project proposals. The thorough analysis of the proposal templates will allow participants to acquire the competence needed to complete the administrative, technical and financial sections of the proposals – particularly within the framework of ITNs.

Frontal lectures will always be coupled with practical exercises; furthermore, participants will be provided with examples of filled-in sections of proposal templates, with a view to facilitating the elaboration of future project proposals.



MAIN CONTENTS

- Introduction to Marie Curie Actions and presentation of ITN Actions' features
- Analysis of the relevant websites (e.g. Participant Portal) and support tools made available by the European Commission (e.g. EURAXESS) to prospective beneficiaries
- Analysis of the structure of the calls for proposals and hints to quickly identify suitable calls
- Analysis of the proposal submission procedure: functioning of the Participant Portal Submission Service (PPSS)
- Filling in the Administrative Forms: data of partners, ethics issues and supporting documents
- Indications to build up the Technical Annex of the proposal: guided analysis of the application form, with particular focus on the:
 - a. elaboration of the *Excellence* Section: identification of project objectives and structuring of Work-packages, paying particular attention to the definition of *Training and Knowledge-sharing activities*
 - b. elaboration of the *Impact* Section: identification of impacts as well as of methods and tools for disseminating and exploiting project results
 - c. elaboration of the *Implementation* Section: definition of project management structures, risks and contingency measures, indicators and related means of verification
- Management of ethics issues
- Evaluation criteria for Marie Curie project proposals.

EUROPEAN RESEARCH COUNCIL (ERC) GRANTS: HOW TO DESIGN A SUCCESSFUL PROPOSAL



DURATION

12 hours



TARGET PARTICIPANTS

Researchers or administrative personnel within universities, research centres or enterprises interested in taking part in the ERC Actions of Horizon 2020.



LEARNING GOALS

This course aims at analysing the main project design techniques and at providing participants with relevant information and instruments to build successful ERC project proposals.

Particular attention will be paid to the analysis of proposal templates, allowing participants to acquire the competence needed to adequately respond to ERC evaluation criteria.

Examples of filled-in sections of proposal templates will be distributed to participants, in order to equip them with ready-to-use and easy-to-adapt material for designing future ERC proposals.



MAIN CONTENTS

- Introduction to the ERC Actions
- Analysis of the relevant websites (e.g. Participant Portal) and support tools made available by the European Commission for prospective applicants and beneficiaries
- Analysis of the structure of the calls for proposals and hints to quickly identify suitable calls
- Analysis of the proposal submission procedure: functioning of the Participant Portal Submission Service (PPSS)
- Filling in the administrative forms:
 - a. required data for the *Principal Investigator*
 - b. required data for the *Host Institution(s)*
 - c. ethics issues
 - d. compulsory supporting documents
 - e. budget elaboration
- Building up the technical-scientific part of the proposal: guided analysis of the templates, with particular focus on:
 - a. Presentation of the *Principal Investigator's CV and Track-record* (section B1)
 - b. Elaboration of section B2:
 - i. Practical advice for drawing up the *Objectives, State of the Art, Methodology Section*
 - ii. Practical advice for drawing up the *Resources Section* and the project budget
 - c. Elaboration of the *Extended Synopsis* (section B1)
 - d. Drawing up of the project abstract
- Management of ethics issues
- Evaluation criteria for ERC project proposals.

H2020 SME INSTRUMENT: HOW TO DESIGN A SUCCESSFUL PROPOSAL



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of Small and Medium-sized Enterprises and/or of university spin-off companies interested in getting access to Horizon funding for SMEs.



LEARNING GOALS

This course aims at strengthening the capacities of SMEs in gaining access to funding available under the SME Instrument scheme of H2020. Particular attention will be devoted to the analysis of proposal templates, so as to help participants acquire the basic skills necessary for the elaboration of the technical and financial sections of the proposals. Practical exercises for the identification of the objectives, implementation methodology, Work-package(s), impacts, marketing strategies and budgetary issues are also foreseen.

Examples of filled-in sections of proposal templates will be distributed to participants during the practical exercises, in order to help them acquire basic notions for successful project elaboration and to equip them with ready-to-use and easy-to-adapt material for designing future SME Instrument proposals.



MAIN CONTENTS

- The SME Instrument: general features and peculiarities of each Phase
- Eligibility criteria and definition of SME
- Functionalities of the Participant Portal, identification and analysis of the SME Instrument Topics
- The proposal submission procedure in Phase 1 and in Phase 2; the SME status validation
- Elaboration of the administrative and financial sections of the proposal and drawing-up of the budget (Phase 2 proposals)
- Elaboration of the Technical Annex: guided analysis of the templates, paying particular attention to:
 - a. identification of the objectives, implementation methodologies, impacts, methods and tools for disseminating and exploiting project results (including relevant marketing strategies). Particular attention will be devoted to issues regarding Intellectual Property Rights
 - b. definition of Work-packages, tasks, timeline and Deliverables
 - c. identification of relevant consortium management structures (only for those Actions featuring the establishment of a partnership)
 - d. management of ethics issues
- Evaluation criteria for SME Instrument project proposals.

HORIZON 2020: PROJECT MANAGEMENT AND FINANCIAL REPORTING



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, as well as individual researchers, either involved in the management of H2020 projects or interested in taking part in it.



LEARNING GOALS

This course aims at providing a comprehensive overview of principles and operational techniques useful for the correct and efficient management and reporting of H2020 projects, taking into account the problematic issues faced by universities, research centres and enterprises in daily project management.

At the end of the course, the participants will be able to face management and reporting of H2020 projects according to the highest standards of quality and effectiveness.



MAIN CONTENTS

- Introduction to Horizon 2020 and presentation of the main Types of Action
- Contents of the Grant Agreement
- Reporting obligations and payment modalities
- Detailed presentation of the H2020 financial rules
 - a. General principles to be followed for sound financial reporting
 - b. Direct costs (personnel, consumables, equipment, subcontracts, travel, other direct costs)
 - c. Indirect costs
 - d. Ineligible costs
- The participation of Third Parties in project activities
- The intellectual property and the new discipline on Open Access
- The certification of costs in Horizon 2020: analysis of novelties in the auditor's check-list and discussion on problematic issues related to the preparation of relevant documents
- Audits, reviews and sanctions.

PROJECT MANAGEMENT AND FINANCIAL REPORTING OF HORIZON 2020 PROJECTS - ADVANCED COURSE



DURATION

20 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres involved in the management, reporting or auditing of Horizon 2020 projects.



LEARNING GOALS

This course aims at analysing in detail Horizon 2020 financial rules, taking into account the problematic issues faced in practice by universities, research centres and enterprises in the daily management of H2020 projects. By the end of the course the participants will be equipped with practical knowledge and operational tools enabling them to effectively manage H2020 projects.

This advanced training course foresees the analysis of a wide range of aspects related to financial reporting, in the form of interactive seminars on the issues of utmost relevance, during which ample reference will be made to records of real cases deriving mainly from experiences gained in the framework of first- and second-level audits.

The course will be concluded by practical exercises during which participants will be called up to prepare a project financial statement (FORM C), based on real-life invoices, salary slips, receipts, time records and other relevant financial supporting documents.



MAIN CONTENTS

- Structure of the Model Grant Agreement
- In-depth analysis of eligible costs and reporting:
 - a. Financial reporting principles
 - b. Reporting of personnel costs in Horizon 2020:
 - methods of calculation, productive time and tools for time recording
 - reporting of costs of in-house consultants: problems deriving from the interpretation of the Annotated Model Grant Agreement
 - c. Other direct costs (consumables, equipment, travel, other direct costs)
 - d. The new definition of subcontract: criticalities and applicable solutions
 - e. Types of Third Parties
 - f. Ineligible costs
- The certification of costs in Horizon 2020: analysis of novelties in the auditor's check-list and discussion on problematic issues related to the preparation of relevant documents
- Practical exercise: roleplay simulation of the drawing up of a financial statement (FORM C).

HOW TO DEAL WITH THE AUDITS OF THE EUROPEAN COMMISSION WITHIN FP7 AND HORIZON 2020



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, as well as individual researchers already involved in management/reporting of projects funded under FP7 or Horizon 2020.



LEARNING GOALS

The course aims at providing participants with relevant knowledge and skills to successfully deal with EC audits, respecting EU financial rules as well as the internationally-established auditing procedures. At the end of the course, the participants will be able to respond to all possible requests regarding information and documents required by the authorities entrusted with the financial verifications: the European Commission, the European Court of Auditors, OLAF and companies contracted for first- and second-level audits. To this aim, all types of eligible costs will be analysed in depth, taking into account the organisational features of enterprises, universities and public research centres.



MAIN CONTENTS

- The principles governing auditing activities
- The procedures for reporting and for archiving relevant supporting documents
- Reporting rules and financial provisions applying to FP7 and Horizon 2020
- Check-list for auditing activities per cost category
- Supporting documentation required for each cost category
- Auditing procedures
- Drafting of the review report and follow-up
- Controls and sanctions
- Practical exercise: roleplay simulation of an audit.

PROJECT MANAGEMENT AND FINANCIAL REPORTING OF MARIE CURIE AND ERC ACTIONS



DURATION

16 hours



TARGET PARTICIPANTS

Research or administrative personnel within universities, research centres and enterprises interested in taking part or already involved in management and reporting of Marie Skłodowska-Curie Actions or ERC projects.



LEARNING GOALS

This course aims at analysing and discussing solutions to the main problems related to the administrative management and financial reporting of Marie Skłodowska-Curie and ERC Actions, both funded in the framework of the *Excellent Science* pillar of Horizon 2020.

The course will analyse in particular fiscal, social security and contractual issues, providing participants with the key notions to effectively handle such issues.



MAIN CONTENTS

- Introduction to ERC and Marie Curie Actions
- Contents of the Model Grant Agreement
- Good practices for preparing employment contracts with researchers and project collaborators
- Tips and hints for successful grant management
- Financial reporting
- Project technical reporting
- Fiscal issues: VAT, direct and indirect taxation
- Social security issues
- Accounting records, cost recording.

THE CONSORTIUM AGREEMENT AND THE MANAGEMENT OF INTELLECTUAL PROPERTY RIGHTS IN HORIZON 2020



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, as well as individual researchers, either already involved in the management of H2020 projects or interested in taking part in it.



LEARNING GOALS

This course aims at providing guidance for the elaboration of the Consortium Agreement and of contracts related to Intellectual Property Rights management between beneficiaries of H2020 projects, paying particular attention to the analysis of legal provisions and contractual aspects related to IPR within the EU funding programmes, and particularly Horizon 2020.



MAIN CONTENTS

- Grant Agreement provisions
- Consortium Agreement (CA):
 - a. Definition and features
 - b. Check-list for and structure of the CA
 - c. Updating of the Grant Agreement and relationship with the CA
 - d. Drafting of the CA; Parties in the CA
 - e. Comment on the main clauses and parts of the CA: preamble, operational provisions, financial provisions, discipline of intellectual property, general and final clauses
 - f. Withdrawal from the CA, termination of the CA, sanctions
- Other contracts between beneficiaries: CA draft versions, secrecy agreement, material transfer agreement
- Discipline on intellectual property
- IPR rules: introduction and definitions
- Property, protection, use of and access to results
- Use of and access to the Background
- The new discipline of Open Access.

KNOWLEDGE TRANSFER IN HORIZON 2020



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, as well as individual researchers, either already involved in H2020 projects or interested in taking part in it.



LEARNING GOALS

This course aims at strengthening participants' knowledge of the regulatory and contractual issues related to management of intellectual property in the framework of knowledge transfer activities. At the end of the training path participants will have developed a deep understanding of the legal and economic-managerial aspects of effective knowledge transfer within Horizon 2020.



MAIN CONTENTS

- Principles of knowledge and technology transfer for universities and research centres in line with EU provisions
- National legislations and internal regulations
- Contract research, collaborative research and other techniques for transferring research results
- Ownership rights of research personnel and other staff categories (in particular students and collaborators) in case of technology transfer
- Establishment of spin-off companies and of other type of legal entities (i.e. associations, consortia)
- Consortium and Partnership Agreements; Research Contracts
- Discipline of public contracts and technology transfer
- Management of technology transfer:

ETHICS ISSUES IN HORIZON 2020 PROJECTS



DURATION

8 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, as well as individual researchers, either already involved in H2020 projects or interested in taking part in it.



LEARNING GOALS

Ethics is given the highest priority in EU-funded research: all activities performed within Horizon 2020 projects must comply with ethical principles and relevant national, EU and international legislation.

The course aims at providing participants with skills and practical tools to respond to such challenge, by making them acquainted with all H2020 ethical principles and explaining how to write and manage H2020 projects in compliance with such requirements.

The course will take into account all possible domains of scientific research, in particular biomedicine, life and natural sciences, social sciences and humanities, paying particular attention to aspects related to the protection of personal data.



MAIN CONTENTS

A) General part

- Fundamental ethical principles in EU and international legislation
- Case studies concerning the implementation of the ethics principles and rules to the specific branches of the science :
 - Biomedicine and life sciences
 - Applied sciences
 - Social sciences.

B) Ethical principles in projects funded under Horizon 2020

- Ethics issues to be dealt with in the elaboration of the project proposal
- The ethics evaluation process
- Fundamental ethical principles and the Grant Agreement; consequences in case of breach of the ethics discipline
- Fundamental ethical principles and contracts between beneficiaries (Consortium Agreement and other types of agreement)
- Fundamental ethical principles and contracts with other subjects (employees, collaborators, subcontractors, Third Parties).



LIFE 2014-2020: HOW TO DESIGN A SUCCESSFUL PROJECT PROPOSAL



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, civil society organisations interested in taking part in LIFE calls for proposals.



LEARNING GOALS

The course aims at analysing the main project design techniques and at providing information and tools to design successful project proposals in the LIFE 2014-2020 programme, through comprehensive lectures coupled with practical exercises.

Through the analysis of the proposal templates related to Traditional projects in the various Strands of the programme, participants will acquire the key notions and skills necessary to draft the administrative, technical and financial sections of LIFE project proposals.

Examples of filled-in sections of proposal templates will be distributed to participants during the practical exercises, to help them acquire basic notions for successful project elaboration and to equip them with ready-to-use and easy-to-adapt material for designing future LIFE proposals.



MAIN CONTENTS

- Introduction to the LIFE programme, analysis of the eligible themes and project types
- The procedure for proposal submission: project registration and features of the on-line application form
- Instructions to complete the administrative sections of the proposal
- Tips to build the consortium and to organise the project design phases
- Introduction to project design: main elements of a project; project design techniques, with some basic notions regarding the Logical Framework Approach
- Building up the proposal and drafting its technical sections
 - a. How to turn an idea into a project; identifying objectives, results, risks, indicators and means of verification
 - b. How to identify eligible project activities, timing, Deliverables and Milestones: practical examples to draft the project transversal actions (*Monitoring of the impact, Public awareness and dissemination, Project management*)
 - c. How to draft the section on project sustainability, with practical examples taken from funded project proposals
- Drawing up the project budget
 - a. The financial provisions in the Model Grant Agreement and in the European Commission documents
 - b. Types of eligible costs
 - c. Administrative and reporting issues to be taken into account for accurate budget elaboration
- Final steps to close the proposal and electronic submission
- Evaluation criteria applying to LIFE project proposals.

FUNDING OPPORTUNITIES IN THE SOCIO-ECONOMIC SCIENCES AND THE HUMANITIES



DURATION

16 hours



TARGET PARTICIPANTS

Research and administrative staff belonging to universities, research centres and other entities active in the field of Socio-economic Sciences and Humanities, interested in the funding opportunities available in such sector in the 2014-2020 EU programming period.



LEARNING GOALS

The course will provide the staff belonging to universities and to other organisations active in the field of Socio-economic Sciences and Humanities with skills and practical tools to help them identify and participate in calls for proposals published within the 2014-2020 EU programming period.

During the course all the main funding opportunities available in such sector will be presented. For each opportunity the eligibility criteria and participation rules will be illustrated, while providing basic information on the structure of the respective proposal templates and practical tips to elaborate successful project proposals.



MAIN CONTENTS

- Horizon 2020:
 - a. The *Excellent Science Pillar*: ERC and Marie Curie Actions
 - b. The *Societal Challenges Pillar*: calls in the thematic area *Europe in a changing world* and other calls of potential interest
 - c. Funding opportunities within the *Science with and for Society* initiative
 - d. Funding opportunities within the *Spreading excellence and widening participation* initiative
- COST (European Cooperation in Science and Technology)
- Erasmus+
- EU Programme for Employment and Social Innovation (EaSI) with particular reference to the Progress axis
- Creative Europe Programme, with particular reference to the Culture Sub-programme, and the Joint Programming Initiative on Cultural Heritage (JPI CH)
- Europe for Citizens Programme
- Rights, Equality and Citizenship Programme 2014-2020
- Opportunities within the European Territorial Cooperation programmes.

WRITING A SUCCESSFUL PROPOSAL FOR INTERREG MED PROJECT CALLS



DURATION

8 hours



TARGET PARTICIPANTS

Researchers and administrative personnel of universities, public authorities at local, regional, national level, public and private research centres, civil society organisations, chambers of commerce, foundations, with an interest in participating in INTERREG MED.



LEARNING GOALS

The course aims at providing participants with the fundamental project development techniques to design a successful proposal for the INTERREG MED programme, with reference to both the Modular and Horizontal Projects. Particular attention will be given to the analysis of the application form requirements, as well as to the use of the Synergie platform for proposals submission.



MAIN CONTENTS

- Overview of the 2014-2020 European Territorial Cooperation programmes
- The INTERREG MED programme
 - Main objectives and expected results
 - The cooperation area
 - MED thematic fields
 - Modular and Horizontal Projects: objectives, results and expected dimension and duration
 - Size and features for a competitive consortium
 - Co-financing rules
- The structure of the online Synergie application form
- Project design techniques: the project intervention logic
- Building up the scientific-technical content of the project proposal:
 - Planning project activities and related Deliverables
 - Definition of target groups and relevant result indicators
 - Communication tasks: programme requirements for specific Modular and Horizontal Projects
- Sound project management structures
- Sound project budget: budget lines specifications
- Assessment criteria and evaluation procedures
- Pre-contracting and contracting procedure.

PROJECT MANAGEMENT AND FINANCIAL REPORTING OF LIFE PROJECTS



DURATION

8 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, civil society organisations interested in participating or already involved in LIFE projects.



LEARNING GOALS

The course aims at analysing the main financial rules of the programme, taking into account the main problematic issues faced by universities, research centres and enterprises in the daily management of the projects.

Participants will acquire in-depth competences useful for management and reporting of projects in all Strands of the programme, with due reference to novelties with respect to the 2007-2013 programming period.



MAIN CONTENTS

- Legal framework, structure and implementation rules
- The financial provisions in the Model Grant Agreement and in the European Commission documents
- The project budget and modifications thereof
- The parties involved: beneficiaries, associates, co-financiers, subcontractors and other Third Parties
- Revenues and other assets, resources made available by Third Parties
- Reporting principles
- Direct costs (personnel, with particular reference to that belonging to public bodies, consumables, supplies, equipment, subcontracts, travel and subsistence, other direct costs), indirect costs, ineligible costs
- Supporting documentation
- Administrative issues related to reporting: contracts with collaborators, fiscal aspects (withholding tax, direct and indirect taxation, conventions to avoid double taxation), social security issues, application of the beneficiaries' internal regulations
- Relationship with other beneficiaries: contractual aspects and fiscal issues (direct and indirect taxation).

PROJECT MANAGEMENT AND FINANCIAL REPORTING OF ERASMUS+ PROJECTS



DURATION

8 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres and civil society organisations interested in taking part or already involved in Erasmus+ projects.



LEARNING GOALS

This course aims at analysing the most important financial rules of the Erasmus+, taking into account the main problematic issues faced by universities, research centres and enterprises in the daily management of the projects.

Participants will strengthen the competences needed for the successful management and reporting of projects funded under all Actions of the programme, with due reference to novelties with respect to the 2007-2013 Lifelong Learning Programme (LLP).



MAIN CONTENTS

- The European Union's education, training, youth and sports policies and the 2014-2020 programming period
- Main features of the Erasmus+ Actions: Key Action 1, Key Action 2, Key Action 3, Jean Monnet Actions, Sport
- Role of the European Commission, of the EACEA and of national agencies
- Beneficiaries and eligible countries
- Financial rules
- Forms of funding (actual costs, unit costs, lump sum) and their application across the various Actions
- Problematic issues in managing the different forms of funding and analysis of case studies: reporting, cost justification, documentation, contractual and fiscal aspects
- Relationships between co-beneficiaries.



MANAGEMENT AND FINANCIAL REPORTING OF PROJECTS FUNDED BY THE EUROPEAN STRUCTURAL AND INVESTMENT FUNDS



DURATION

16 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres, civil society organisations interested in, or already taking part in, projects funded by the European Structural and Investment Funds.



LEARNING GOALS

The course aims at making participants acquainted with the rules and practices applicable at national and European level for managing projects funded by the European Structural and Investment Funds. The closing section of the course will illustrate the key features of the main European Territorial Cooperation programmes. After an in-depth analysis of the new features of the five ESI Funds for the 2014-2020 programming period, participants will be guided through the problematic issues arising in the reporting process, and the related contractual and fiscal issues.



MAIN CONTENTS

- The strategy behind the European Structural and Investment Funds in the 2014-2020 programming period
- The European Structural and Investment Funds (ESIF):
 - a. European Regional Development Fund (ERDF)
 - b. European Social Fund (ESF)
 - c. Cohesion Fund (CF)
 - d. European Agricultural Fund for Rural Development (EAFRD)
 - e. European Maritime and Fisheries Fund (EMFF)
- European Territorial Cooperation
- Differences between ESIF and Horizon 2020 and possible synergies
- The financial rules in the European Union official documents
- The parties involved: the Managing Authority, Beneficiaries, Third Parties (subcontractors and affiliates)
- Forms of funding: actual costs, unit costs, lump sum and flat rate
- General rules for financial reporting:
 - a. Direct costs (personnel costs, consumables, equipment, subcontracts, travels and accommodation, other direct costs)
 - b. Indirect costs
 - c. Ineligible costs
 - d. Overheads, eligibility of costs related to the activities carried out by associates, shareholders, managing directors or members of the Board of Directors
 - e. Documentation required for cost reporting
 - f. Audit procedures
- Rules on revenues, in-kind contributions, discipline of state aid (*de minimis*)
- Problematic issues in cost reporting: contracts with partners, collaborators and other auxiliaries
- Fiscal aspects (direct and indirect taxation, withholding tax, double taxation agreements)
- Social security aspects
- Application of the beneficiaries' internal regulations.

SYNERGIES BETWEEN EUROPEAN STRUCTURAL AND INVESTMENT FUNDS, HORIZON 2020 AND OTHER EU PROGRAMMES



DURATION

8 hours



TARGET PARTICIPANTS

Personnel of enterprises, universities, public authorities, public and private research centres interested in, or already taking part in, projects funded by Horizon 2020, by the European Structural and Investment Funds or by other EU innovation programmes.



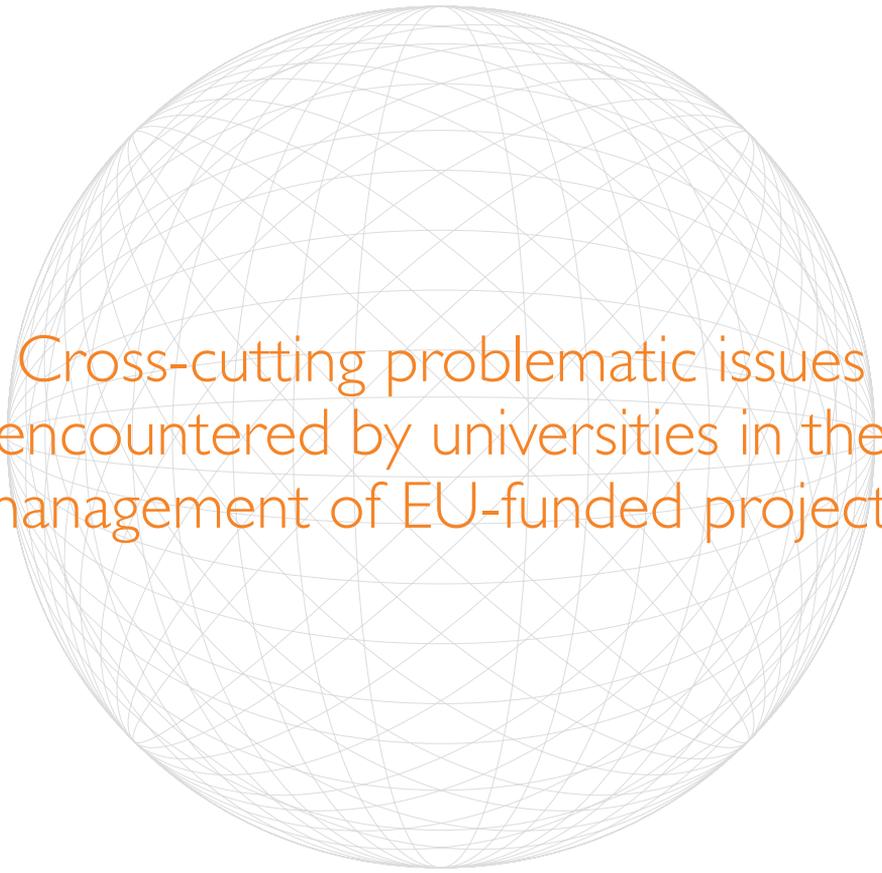
LEARNING GOALS

For the 2014-2020 programming period, the EU promotes a new strategic approach aimed at increasing the convergence and synergies of different funding channels available. This course aims at shedding light on all opportunities to create and exploit synergies between Horizon 2020 and other EU programmes in the field of innovation, in particular the European Structural and Investment Funds.



MAIN CONTENTS

- Synergies: definition, objectives, implementation
- The 2014-2020 Cohesion Policy
- *The Smart Specialisation Strategies (RIS3)*
- Management and implementation of the European Structural and Investment Funds
- The European Regional Development Fund
- Synergies with EU programmes in the field of innovation
- Potential synergies with Horizon 2020
- Potential synergies with COSME, Erasmus + and Creative Europe
- How to enable synergies between different funding programmes.

A large, light gray wireframe sphere is centered on the page. It is composed of numerous thin, intersecting lines that create a grid-like pattern across its surface, giving it a three-dimensional, geometric appearance.

Cross-cutting problematic issues
encountered by universities in the
management of EU-funded projects



AGREEMENTS BETWEEN UNIVERSITIES FOR THE ISSUING OF JOINT DEGREES AND FOR THE PARTICIPATION IN EU FUNDING PROGRAMMES



DURATION

8 hours



TARGET PARTICIPANTS

University personnel involved in the management of research/mobility projects funded within the most relevant EU programmes.



LEARNING GOALS

The key aim of the course is to compare national and EU legislations concerning joint curricula and degrees with the rules for participation in the EU funding programmes, mainly Horizon 2020 (in particular Marie Skłodowska-Curie Actions) and Erasmus+.

Participants will thus be enabled to learn how to manage such problematic issues, especially through the adoption of contractual and regulatory solutions by universities.



MAIN CONTENTS

- The Bologna Process and the European Union legislation
- Comparison between national legislations
- Other experiences in Europe
- Problematic issues faced by universities for the participation in programmes which fund mobility initiatives and joint or multiple degrees, particularly Master and PhD courses
- The role of undertakings and of other non-academic bodies
- Overview of the experiences of European universities
- Draft of internal regulations to be adopted by the universities
- Agreements for the delivery of joint or multiple degrees.



CREATING AND MANAGING A SPIN-OFF COMPANY: FROM IDEA TO PRACTICE



DURATION

16 hours



TARGET PARTICIPANTS

Technical and administrative personnel engaged in the management of spin-off companies or supporting researchers in technology transfer; researchers, including those lacking a specific legal-economic background, interested in developing a business idea or in acquiring the basic notions needed to tackle technology transfer issues.



LEARNING GOALS

The main aim of this course is to present an overview of the problematic issues faced by founders of spin-off companies. At the end of the learning path, participants will have reached awareness of the various aspects to be tackled, their complexity and the possible alternative solutions to guarantee the economic and financial sustainability of an entrepreneurial initiative, as well as the collective and personal responsibilities it brings along.



MAIN CONTENTS

The course agenda covers legal matters (discipline of universities and public research organisations, contract law, commercial law and tax law), business economics and financial management, as outlined below:

- Participation of universities and public bodies in collective undertakings (companies, consortia, associations)
- Overview of the main types of companies and collective undertakings to carry on business activities complying with EU law: private partnerships, joint-stock companies, consortia, associations, EEIGs and other typologies
- Features of the various legal forms, procedures for their creation, main accounting, legal and fiscal requirements
- Personal responsibility of shareholders and of business administrators
- Comparative overview of the fiscal discipline applicable to the various company forms
- Relationship between the research centre / university and the spin-off company: conflicts of interests, conventions, shareholders' agreements, industrial property, status of the personnel
- Definition of the company's mission
- The Business Plan
- Elaboration of a Business Plan based on a concrete case study.



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