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***BESTPRAC H2020 Coordinator's Survival Kit***

***Overview of key Coordinator tasks, issues, relevant  
BESTPRAC products, and other tools and resources***

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## BESTPRAC

### The voice of research administrators building a network of administrative excellence

COST Action TN1302

Version 01.09.2019.

The aim of this document is to assist Coordinators of Horizon 2020 projects to identify financial, legal and other administrative tasks and issues that may arise during the project's life-cycle, starting with the preparation of the project proposal and ending with the finalisation of the project. The document has been prepared by participants of the COST project TN 1302 – BESTPRAC and is intended primarily for the project stakeholders' use.

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## Introduction

Transnational, collaborative research and innovation (R&I) projects require coordination in order to be successful. In Horizon 2020 (H2020) – the current EU Framework Programme for Research and Innovation – all projects which include more than one beneficiary (partner) must have a Coordinator, which is one of the beneficiaries. As such, the role of the Coordinator is an institutional responsibility.

While one person will be the person in charge of coordinating the project and its consortium of beneficiaries, this person will need the help of support staff with the required knowledge and skills to perform the tasks of the Coordinator in a successful manner. As the EU works to widen the reach of its Framework Programme – in terms of participating researchers, organisations and countries – and as a growing number of organisations strive to successfully participate, there is a growing need for support staff who can obtain and develop this knowledge and skills.

With this guide, we aim to give Coordinators an overview of which tasks to be prepared for, and a quick way to find useful information on how to perform the task. First and foremost, we hope that those who have little or no experience with the role of the Coordinator may find this guide helpful, but we also believe that those with more experience may find this overview useful.

This guide has been written by people participating in the COST Action TN 1302 – BESTPRAC. In BESTPRAC, we have three working groups that reflect the broad areas of knowledge and skills that are prerequisites of successful support and management of transnational, collaborative research and innovation (R&I) projects:

- Admin
- Finance
- Legal

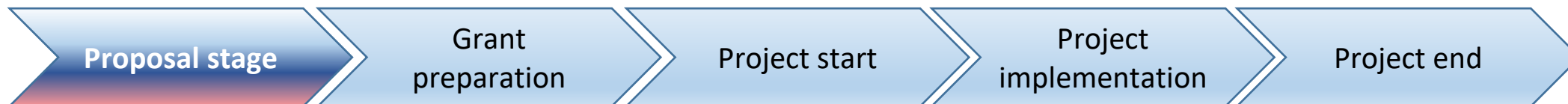
In this guide, we have indicated which of these areas of expertise are required for or may contribute in a valuable manner to each of the tasks at hand. Many tasks will require or benefit from expertise from more than one of these areas of expertise.

We have structured this guide to follow the project life-cycle. We believe that this may help the reader identify and anticipate the tasks that in some cases definitely will and other cases may arise along the way and be prepared for a successful and timely execution of these tasks:



**Just click on the arrow if you would like to navigate directly to one of the stages!**

This guide is primarily tailored to H2020, and we include information, advice and tips for tasks that are linked to specific rules and requirements for H2020. However, we hope that some of the ideas presented here may be more generally applicable, and may be adapted to other transnational, collaborative research and innovation projects as well.



Just click on the arrow if you would like to navigate directly to one of the other stages!

## 1. The proposal stage

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Horizon Scanning	Being familiar with Research & Innovation funding sources	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Guide on R&amp;I Funding Programmes beyond Horizon 2020</a>, September 2018</li> <li>• <a href="#">Synergies between H2020, ESIF and other funding sources</a> – Survey results, September 2018</li> <li>• <a href="#">Best practices related to enabling synergies with other financing programmes</a>, September 2016</li> <li>• <a href="#">Synergies between H2020 and other European funded projects</a>, March 2019</li> <li>• <a href="#">Synergies between ESIF and H2020 - A theoretical framework</a>, September 2016</li> <li>• <a href="#">Guide on Horizon Europe</a>, September 2018</li> <li>• <a href="#">R&amp;D EU funding: from H2020 to FP9</a></li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Verify the financial rules, including cost eligibility requirements and funding provisions, for calls that are considered to be of interest.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> <li>• <a href="#">Financial management of MSCA: a practitioner’s perspective</a>, November 2017</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual – What you need to know about Horizon 2020 calls</a></li> <li>• <a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> <li>• <a href="#">H2020 Programme Guidance on List of issues applicable to particular countries</a></li> <li>• <a href="#">How to successfully manage a Horizon 2020-funded project - 10 practical tips on research project management</a>. EU Guide produced by PwC and the Technopolis Group.</li> <li>• <a href="#">Study on Assessing the Research Management Performance of Framework Programmes Projects</a>, carried out by PwC and Technopolis Group upon request of the European Commission.</li> </ul>
Project proposal	1-2 page long project proposal answering the call	ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">The Art of Writing</a></li> <li>• <a href="#">Proposal recycling strategies #1</a></li> <li>• <a href="#">Proposal recycling strategies #2</a></li> <li>• <a href="#">Proposal recycling strategies #3</a></li> </ul>	
Partnership building	Reaching out and attracting relevant partners	ADMIN		<ul style="list-style-type: none"> <li>• <a href="#">H2020 Partner Search Facility</a></li> <li>• <a href="#">Enterprise Europe Network</a></li> </ul>
NDA	Checklist for NDA (short list of “must check” clauses (the most important/tricky) that cannot be omitted while negotiating NDAs	LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Non-disclosure agreements and essentials of the Grant Agreement and Consortium Agreement</a></li> <li>• <a href="#">"Alone in the grant office" - Survival Kit - LEGAL - PART 1 (Checklist and tips for NDAs for H2020 Actions)</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - Non-disclosure agreement: a business tool</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Legal issues to be considered at the proposal stage	Legal issues to be considered at the proposal stage in the context of possible consequences / liabilities (including financial ones)	LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">"Alone in the grant office" - Survival Kit - LEGAL - PART 2 (Checklist and recommendations for legal issues in the proposals for H2020 Actions)</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - IP Management in Horizon 2020: Proposal Stage</a></li> </ul>
Integration of proposal and budget development	Agree on approach to integration of development of proposal and budget	ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Rechts- und Finanz-FAQ zu Horizon 2020</a>, published by The Austria Research Promotion Agency (FFG)</li> </ul>
Budget strategy	Top-down vs. bottom-up budget development	ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> <li>• <a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Financial management of cross-border European research projects: what are the practitioner's needs?</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: tips and tricks</a>, June 2018</li> </ul>	
Collecting necessary information	Collect from partners necessary information for completing the proposal and the associated administrative forms	ADMIN, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual &gt; Grants &gt; Applying for funding &gt; Submit proposals &gt; Get prepared</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
(administrative, financial, legal)	Distribute (develop if necessary) template for collection of budget data from partners	FINANCE		
Consortium budget development	Use (develop if necessary) template for incorporation of partner cost data and proposal effort data (person months) into an integrated consortium budget.  Develop consortium budget in interaction with development of project scope.	FINANCE, ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> <li>• <a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li>• <a href="#">Budgeting in H2020: difficulties, tools and best practices</a>, September 2014</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> </ul>	
	Be prepared to explain key financial issues to partners in the consortium, e.g., <ul style="list-style-type: none"> <li>• Cost eligibility rules/requirements</li> <li>• Calculation of personnel costs</li> <li>• Third parties</li> <li>• Internally invoiced goods and services</li> <li>• Documentation of costs</li> </ul>	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">The coordinator's survival kit: financial topics</a>, September 2018</li> <li>• <a href="#">Personnel costs in H2020 from the legal perspective</a>, March 2015</li> <li>• <a href="#">New definition of additional remuneration</a>, September 2017</li> <li>• <a href="#">Internal invoicing in H2020</a>, September 2017</li> <li>• <a href="#">Eligibility issues concerning costs related to EU-funded research: a BESTPRAC survey</a>, September 2014</li> </ul>	



Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Draft overall consortium budget based on planned effort and partner cost data, distribute to partners for comments, and agree on final version	FINANCE, ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> <li>• <a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li>• <a href="#">Budgeting in H2020: difficulties, tools and best practices</a>, September 2014</li> </ul>	
Writing/overviewing the proposal	Depending on research support staff position and involvement in project development, they have to support or get engaged in the development of the proposal	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">The Art of Writing</a></li> <li>• <a href="#">H2020 application writing</a></li> <li>• <a href="#">Application writing</a></li> <li>• <a href="#">Getting in the H2020 mindset: How to write successful research proposals?</a></li> </ul>	
	Develop budget explanation and justification to be integrated into the proposal	ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> </ul>	
Communication and dissemination plan	Preparing for the communication and dissemination activities. Identification of target groups and the ways of the reaching them, having impact on them	ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Getting in the H2020 mindset: How to write successful research proposals?</a></li> <li>• <a href="#">Science Communication</a></li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Cross-cutting issues	Integrating cross-cutting issues, such as gender, ethics, etc. in the preparation of the application	ADMIN, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">How to tackle cross-cutting issues in H2020 proposals and what to expect in the new Framework Programme</a></li> <li>• <a href="#">How to deal with ethics issues?</a></li> <li>• <a href="#">Pre-ethical thoughts</a></li> <li>• <a href="#">Access to research data and its management, September 2017</a></li> <li>• <a href="#">Publications and open access – the obligation to disseminate project results vs. obligation to protect the project results</a></li> <li>• <a href="#">Open Access Strategy a first idea</a></li> <li>• <a href="#">Open Data Pilot in H2020: Data Management Plan</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - Open Access to scientific publications and research data in Horizon 2020: Frequently Asked Questions (FAQs)</a></li> <li>• <a href="#">IP Helpdesk - Publishing v. patenting</a></li> </ul>
Checklist before submission	External review of the application, cross check of budget, indicators, etc.	ADMIN, FINANCE, LEGAL		



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## 2. The grant preparation stage

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Key Grant Agreement and Consortium Agreement issues	Review and assess key issues and tasks pertaining to the Grant Agreement (GA) and the Consortium Agreement (CA)	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a></li> <li>• <a href="#">BESTPRAC FAQs: Administrative, financial and legal questions resulting from the provisions of the Model Grant Agreement / Consortium Agreement in Horizon 2020</a> (version 7/11/2016)</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual: Grant preparation</a></li> </ul>
Administrative checks	Ensure that all information and data are included in a correct manner.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Grant Agreement Preparation</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual: Enter &amp; submit grant data</a></li> </ul>
Intellectual Property Rights (IPR) issues	Review and address relevant Intellectual Property Rights (IPR) issues	LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - How to manage IP in Horizon 2020: grant preparation stage</a></li> </ul>
Legal entity validation	Validation of beneficiaries who have not been previously validated for participation in the Framework Programme	ADMIN, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual: Validation of your organisation</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Financial capacity assessment	Assessment of the financial capacity of the coordinator entity (organisation) when the requested EU funding is equal or greater than €500 000, if required by the EC.	FINANCE		<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual: Financial capacity assessment</a></li> </ul>
Clarification of Grant Agreement (GA) details	If needed, address any requests from the funding body for explanations, clarifications and details, to finalize the project description (Annex 1 to the Grant Agreement), indicators, deadlines, budget, etc.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Grant Agreement Preparation</a></li> </ul>	
Ethics review	Ethics review (ethics screening & assessment)	ADMIN, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Ethics issues (legal elements) in H2020 Actions post-award phase</a></li> <li>• <a href="#">Pre-ethical thoughts</a></li> <li>• <a href="#">Ethics Supporting Documents</a></li> <li>• <a href="#">How to deal with ethics issues?</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual: Ethics review</a></li> </ul>
Security scrutiny	Security scrutiny of proposals dealing with information that is EU-classified under the Commission's internal Rules of Procedure	ADMIN, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual: Security scrutiny</a></li> </ul>
Consortium Agreement (CA)	Select CA template, select relevant options, delete non-selected options, and finalise draft text. We recommend the DESCA template.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">BESTPRAC FAQs: Administrative, financial and legal questions resulting from the provisions of the Model Grant Agreement / Consortium Agreement in Horizon 2020</a> (version 7/11/2016)</li> <li>• <a href="#">Practical comments for DESCA model Consortium Agreement for Horizon 2020</a></li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Financial management of MSCA: a practitioner's perspective</a>, November 2017</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">DESCA 2020 Model Consortium Agreement</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Presentation of the internal institutional guidelines on DESCA model. CA used by the post award research support officers (especially non-lawyers) as a daily work	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">"Alone in the grant office" - Survival Kit - LEGAL - PART 3 (Practical comments for DESCA model consortium agreement of H2020)</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">DESCA 2020 Model Consortium Agreement</a></li> </ul>
	For MSCA network projects, i.e., MSCA ITN and RISE projects, a CA is also required. We recommend the LERU template for MSCA ETN projects as a starting point. An adaptation of the LERU template has been presented at BESTPRAC.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">The LERU Model Consortium Agreement for the H2020 MSCA ITNs (case studies)</a></li> <li>• <a href="#">Adaptations to the LERU Consortium Agreement template for MSCA ITNs</a></li> <li>• <a href="#">Financial management of MSCA: a practitioner's perspective</a>, November 2017</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a></li> </ul>
	Detailed analysis of the new LERU model consortium agreement for the H2020 Marie Skłodowska-Curie Actions Innovative Training Networks with particular attention to identification of potentially problematic clauses, followed by case studies.	LEGAL, ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Sofia, March 2016</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a></li> </ul>
	For MSCA network projects, include specific provisions for the allocation of the budget for institutional costs <sup>1</sup> in the CA. Also, calculate and present in attachment a consortium budget, taking into account the allocation provisions.	FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Adaptations to the LERU Consortium Agreement template for MSCA ITNs</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a></li> </ul>
	Tips & tricks for a coordinator having the task to negotiate the CA	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">BESTPRAC FAQs: Administrative, financial and legal questions resulting from the provisions of the Model Grant Agreement / Consortium Agreement in Horizon 2020</a> (version 7/11/2016)</li> </ul>	

<sup>1</sup> MSCA Institutional costs: (1) Research, training and networking activity costs. (2) Management and indirect costs.

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Distribute draft CA to the beneficiaries for comments. Agree on a final version and obtain authorised signatures from all beneficiaries.	ADMIN, FINANCE, LEGAL		
Third party issues	Verify that all third party issues for all beneficiaries have been classified and declared correctly, in the budget as well as in the proposal. If there are any doubts or outstanding issues, agree with the EC / Funding Authority and the respective beneficiary how to resolve this.	FINANCE, LEGAL, ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Linked third parties: Who are they, and what makes them different?</a></li> <li>• <a href="#">Third parties making personnel available to the beneficiary</a></li> <li>• <a href="#">Third parties making resources available to the beneficiary</a></li> <li>• <a href="#">Case study: third party in H2020 projects</a></li> <li>• <a href="#">Third parties and IPR</a></li> <li>• <a href="#">Third party providing in-kind contributions against reimbursement</a></li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Financial management of MSCA: a practitioner's perspective</a>, November 2017</li> </ul>	
	Check if any beneficiaries plan to involve a linked third party. If so, the linked third party budget must be set out in a separate budget row.	FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Linked third parties: Who are they, and what makes them different?</a></li> </ul>	
Career Development Plan template for MSCA fellows.	For MSCA ITN projects, draft and agree on a template career development plan for the ESRs (Early-Stage Researchers).	ADMIN, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a>. See Attachment 5.</li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Partnership Agreement for the involvement of Partner Organisations in MSCA projects	For MSCA multi-beneficiary projects, i.e., MSCA ITN and MSCA RISE networks that are going to involve partner organisations, draft and agree on a template partnership agreement.	LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a>. See Attachment 6.</li> </ul>
Secondment Agreement for MSCA projects	For MSCA projects that are going to include secondments of researchers to other beneficiaries or to partner organisations, draft and agree on a template secondment agreement.	FINANCE, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a>. See Attachment 7.</li> </ul>



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### 3. The project start

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Project Management, Integration and Project Management Plan	Preparing an integrated project management plan to support the whole process in terms of scientific, administrative, financial processes, quality assurance, etc.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">BESTPRAC Learning materials - Project Management</a></li> <li>• <a href="#">Experiences in project management</a></li> <li>• <a href="#">Project Management in H2020 Projects</a></li> <li>• <a href="#">Workshop Belgrade – FINANCE WG presentations</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk Brochure – "Making the Most of Your H2020 Project: Boosting the impact of your project through effective communication, dissemination and exploitation"</a></li> </ul>
Project visual identity, communication & dissemination plan	Elaborating the project's visual identity, templates, appearance, communication & dissemination plan with target groups, communication channels& tools, messages	ADMIN, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk Brochure – "Making the Most of Your H2020 Project: Boosting the impact of your project through effective communication, dissemination and exploitation"</a></li> <li>• <a href="#">H2020 Online Manual - Communicating Your Project</a></li> <li>• <a href="#">EU H2020 Guide: "Communicating EU research and innovation guidance for project participants"</a></li> <li>• <a href="#">IP Helpdesk - The Plan for the Exploitation and Dissemination of Results in Horizon 2020</a></li> </ul>



Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Setting up project coordination & management team	Defining roles and responsibilities, launching communication flow	ADMIN, FINANCE, LEGAL		
Data management plan	Elaborating data management plan for all relevant project activities	ADMIN, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">BESTPRAC Open Data / Open Access learning materials</a></li> <li>• <a href="#">GDPR and Data Management</a></li> <li>• <a href="#">Presentations from the ADMIN Working Group meeting – Bucharest, February 2018</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual – Open Access</a></li> <li>• <a href="#">ERC "Guidelines on the Implementation of Open Access to Scientific Publications and Research Data in Projects supported by the European Research Council under Horizon 2020"</a></li> <li>• <a href="#">EU "Guidelines to the Rules on Open Access to Scientific Publications and Open Access to Research Data in Horizon 2020"</a></li> </ul>
Payments of EU funding	Depending on the financial provisions in the CA, develop a plan for the distribution of EU funding to the beneficiaries	FINANCE		
	Collect and verify bank account information (financial identification) from the partners.	FINANCE		
	Verify that all preconditions (Grant Agreement, Consortium Agreement) for disbursement of EU funding have been fulfilled, and transfer EU funding to the partners in accordance with these contracts.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the FINANCE Working Group meeting – Bucharest, February 2018</a></li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Consortium reporting template	Adapt (develop if necessary) a template for internal financial reporting within the consortium, to be used for project monitoring for the consortium.	FINANCE		
Internal kick-off meeting	Organise/participate in internal kick-off meeting for the Coordinator Management Support Team. Agree on roles/division of responsibilities and procedures to be proposed to the consortium.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the FINANCE Working Group meeting – Bucharest, February 2018</a></li> </ul>	
Consortium kick-off meeting	Provide presentation material and/or participate at meeting: <ul style="list-style-type: none"> <li>• Admin, Legal, Financial</li> <li>• Reporting and monitoring – within the consortium and towards the EU</li> </ul>	ADMIN, FINANCE, LEGAL		
Legal scope of declarations signed by the beneficiaries	Outcomes of analysis of the legal scope of declarations to be signed by the legal representatives in the context of potential liabilities; Recommendations on measures to be taken by project Coordinator to comply with all formal requirements at the proposal and GA preparation stage	LEGAL, ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Ljubljana, March 2015</a></li> </ul>	
Electronic signature in horizon 2020 legal documents	Implementation of the electronic signature; Status/Validity of the electronic signature in H2020	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Ljubljana, March 2015</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Grant signature</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Publications and open access	Recommendations on avoiding misconceptions about publication and protection of project results in the context of open access we should explain to the project teams properly. Detailed modalities and legal requirements of open access in H2020, the traditional and the new approaches towards “patenting vs. publishing”	ADMIN, LEGAL, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">BESTPRAC Open Data / Open Access learning materials</a></li> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Budapest, September 2015</a></li> <li>• <a href="#">Presentations from the joint Working Group meeting – Sofia, March 2016</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual – Open Access</a></li> <li>• <a href="#">ERC "Guidelines on the Implementation of Open Access to Scientific Publications and Research Data in Projects supported by the European Research Council under Horizon 2020"</a></li> <li>• <a href="#">EU "Guidelines to the Rules on Open Access to Scientific Publications and Open Access to Research Data in Horizon 2020"</a></li> <li>• <a href="#">IP Helpdesk - The Plan for the Exploitation and Dissemination of Results in Horizon 2020</a></li> </ul>
Ethics issues (legal elements) in h2020 actions – pre and post-award phases	Guidance on how to complete an ethics Self-Assessment, with regard to the methodology, research objectives or impact (e.g. profiling the health of people based on big data), as well as how to manage ethics issues avoiding common mistakes	ADMIN, LEGAL, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">BESTPRAC learning materials on ethics</a></li> <li>• <a href="#">Presentations from the joint Working Group meeting – Sofia, March 2016</a></li> <li>• <a href="#">Presentations from the ADMIN Working Group meeting – Bucharest, February 2018</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual &gt; Cross-cutting issues &gt; Ethics</a></li> <li>• <a href="#">H2020 Guide: "How to complete your ethics self-assessment"</a></li> </ul>
Applicable law and dispute resolution	Applicable law and dispute resolution	LEGAL, ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the joint Working Group meeting – Lisbon, March 2017</a></li> </ul>	
	Belgian law – Applicable principles	LEGAL, ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the joint Working Group meeting – Lisbon, March 2017</a></li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
HR Excellence in Research logo	Legal aspects	LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Analysis of the formal requirements set out by the European Commission to obtain the HR Excellence in Research logo</a></li> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Budapest, September 2015</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">EURAXESS - Human Resources Strategy for Researchers (HRS4R)</a></li> </ul>
GDPR	Relevance and points of attention for universities	LEGAL, ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">GDPR and Data Management</a></li> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Belgrade, September 2018</a> <ul style="list-style-type: none"> <li>○ Including presentations of experiences at: <ul style="list-style-type: none"> <li>○ TU Wien</li> <li>○ University of Iceland</li> <li>○ Aalto University</li> <li>○ Maynooth University Ireland</li> <li>○ Spiru Haret University</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">EU introduction: The General Data Protection Regulation (GDPR) is now applicable. Are you ready for it?</a></li> <li>• <a href="#">Regulation (EU) 2016/679 of the European Parliament and of the Council</a></li> </ul>
Technology Transfers – licensing		LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the LEGAL Working Group meeting – Belgrade, September 2018</a></li> </ul>	
Technology Transfer – spinoff		LEGAL, ADMIN, FINANCE		
Horizon Europe	analysis of proposal for Regulation	ADMIN, FINANCE, LEGAL		

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Impact in H2020		ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Presentations from the ADMIN Working Group meeting – Belgrade, September 2018</a></li> <li>• <a href="#">Impact in RIA and CSA proposals - how to address the impact in proposals</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk Brochure – "Making the Most of Your H2020 Project: Boosting the impact of your project through effective communication, dissemination and exploitation"</a></li> <li>• <a href="#">H2020 Online Manual - Communicating Your Project</a></li> <li>• <a href="#">EU H2020 Guide: "Communicating EU research and innovation guidance for project participants"</a></li> <li>• <a href="#">IP Helpdesk - The Plan for the Exploitation and Dissemination of Results in Horizon 2020</a></li> </ul>
Synergies between H2020 and other European funded projects		ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Best practices related to enabling synergies with other financing programmes</a>, September 2016</li> <li>• <a href="#">Synergies between ESIF and H2020 - A theoretical framework</a>, September 2016</li> <li>• <a href="#">Presentations from the ADMIN Working Group meeting – Belgrade, September 2018</a></li> <li>• <a href="#">Presentations from the ADMIN Working Group meeting – Bucharest, February 2018</a></li> </ul>	<ul style="list-style-type: none"> <li>• EU guide: <a href="#">"Enabling synergies between European Structural and Investment Funds, Horizon 2020 and other research, innovation and competitiveness-related Union programmes Guidance for policy-makers and implementing bodies"</a></li> <li>• Publication from the NMP TeAm 4 H2020 project: <a href="#">"FAQs – Synergies between Horizon 2020 and other funding mechanisms"</a></li> </ul>



Just click on the arrow if you would like to navigate directly to one of the other stages!

## 4. The implementation stage

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Communication & dissemination	Continuous communication & dissemination activities in line with the defined plan	ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Scientific Reporting &amp; Communication</a></li> <li>• <a href="#">Publications and open access – the obligation to disseminate project results vs. obligation to protect the project results</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - IP management in Horizon 2020: project implementation and conclusion</a></li> <li>• <a href="#">IP Helpdesk - Open Access to scientific publications and research data in Horizon 2020: Frequently Asked Questions (FAQs)</a></li> <li>• <a href="#">IP Helpdek - Publishing v. patenting</a></li> </ul>
Researcher Agreement for researchers funded by MSCA ITN projects	Inform all beneficiaries of the need to sign an agreement with the recruited ESR(s) addressing all rights and obligations specified by Article 32 of the Grant Agreement	ADMIN, FINANCE, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">LERU template for MSCA ITN ETN</a></li> </ul>
Coordination & management	Continuous supervision and management of the project in line with project management plan including risk management, quality assurance, etc.	ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">How to coordinate multiple EIT KIC operations, September 2017</a></li> <li>• <a href="#">Experiences in project management</a></li> <li>• <a href="#">Project Management in H2020 Projects</a></li> <li>• <a href="#">IT System supporting Project Management at Silesian University of Technology</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">European Commission Project Management Handbook</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Collect data on incurred costs and effort (person months) from the partners for periodic internal consortium project monitoring	FINANCE, ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	
	Aggregate and analyse collected data and present for assessment by Coordinator team and consortium bodies.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Horizon 2020 FAQ</a></li> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> </ul>
Third parties	Dealing with and managing contributions by third parties	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Linked third parties: Who are they, and what makes them different?</a></li> <li>• <a href="#">Third parties making personnel available to the beneficiary</a></li> <li>• <a href="#">Third parties making resources available to the beneficiary</a></li> <li>• <a href="#">Case study: third party in H2020 projects</a></li> <li>• <a href="#">Third parties and IPR</a></li> <li>• <a href="#">Third party providing in-kind contributions against reimbursement</a></li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Reporting	Collecting all information form partners, preparing and submitting reports	ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Scientific Reporting &amp; Communication</a></li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The coordinator's survival kit: financial topics</a>, September 2018</li> <li>• <a href="#">Financial reporting in H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> <li>• <a href="#">Financial management of MSCA: a practitioner's perspective</a>, November 2017</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Reports &amp; payment requests</a></li> </ul>



Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	<p>Be prepared to explain key financial issues to partners in the consortium, e.g.,</p> <ul style="list-style-type: none"> <li>• Cost eligibility rules/requirements</li> <li>• Calculation of personnel costs</li> <li>• Third parties</li> <li>• Internally invoiced goods and services</li> <li>• Documentation of costs</li> </ul>	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Financial reporting in H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">The coordinator's survival kit: financial topics</a>, September 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> <li>• <a href="#">Personnel costs in H2020 from the legal perspective</a>, March 2015</li> <li>• <a href="#">New definition of additional remuneration</a>, September 2017</li> <li>• <a href="#">Internal invoicing in H2020</a>, September 2017</li> <li>• <a href="#">New rules for internal invoicing in H2020 compared to FP7</a>, March 2016</li> <li>• <a href="#">Eligibility issues concerning costs related to EU-funded research: a BESTPRAC survey</a>, September 2014</li> <li>• <a href="#">Linked third parties: Who are they, and what makes them different?</a></li> <li>• <a href="#">Third parties making personnel available to the beneficiary</a></li> <li>• <a href="#">Third parties making resources available to the beneficiary</a></li> <li>• <a href="#">Case study: third party in H2020 projects</a></li> <li>• <a href="#">Third party providing in-kind contributions against reimbursement</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Review and assess the financial statements provided by the partners. Asses them against the Grant Agreement, EC rules and guidelines, the Consortium Agreement and any relevant decisions made by an authorised consortium body.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Horizon 2020 FAQ</a></li> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> <li>• <a href="#">H2020 Online Manual - Reports &amp; payment requests</a></li> </ul>
	Prepare relevant data on costs and effort (person months) for presentation to the EC and external experts at review meeting.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Horizon 2020 FAQ</a></li> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Audits (CFS)	<p>For the final periodic reporting, verify which partners are likely to need a CFS (Certificate on the Financial Statement).</p> <p>Alert these partners to this scenario, and suggest to them that they should start early to prepare for this, and ascertain that they have made the appropriate arrangements so that a qualified auditor will be available to produce the CFS on time.</p>	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Certificate on Financial Statements: a BESTPRAC survey</a>, September 2018</li> <li>• <a href="#">Audit experiences (tips from Norway)</a>, June 2018</li> <li>• <a href="#">H2020 audit procedures</a>, June 2018</li> <li>• <a href="#">Certificate on Financial Statements</a>, June 2018</li> <li>• <a href="#">Best practices for ESIF audits</a>, September 2016</li> <li>• <a href="#">H2020 audit procedures with standard factual findings</a>, April 2016</li> <li>• <a href="#">CFS and financial audit procedures</a>, April 2016</li> <li>• <a href="#">The importance of time sheets in audit</a>, March 2016</li> <li>• <a href="#">Legal base of H2020 audits</a>, September 2015</li> <li>• <a href="#">Audit experiences (tips from Austria)</a>, September 2015</li> <li>• <a href="#">Audit experiences (Slovenian experience)</a>, March 2015</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual – Final report</a></li> <li>• <a href="#">Model for the Certificate on the financial statements – (Annex 5 to the General Model Grant Agreement)</a></li> </ul>
Cross cutting issues	Handling relevant issues on a daily basis	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Ethics issues (legal elements) in H2020 Actions post-award phase</a></li> <li>• <a href="#">Pre-ethical thoughts</a></li> <li>• <a href="#">Ethics Supporting Documents</a></li> <li>• <a href="#">How to deal with ethics issues?</a></li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Payments of EU funding	Transfer EU funding to the partners in accordance with the Grant Agreement, Consortium Agreement and EC acceptance of costs.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	
Budget changes	Proactively monitor potential needs for budget reallocations within the consortium	FINANCE, ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> <li>• <a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> <li>• <a href="#">Financial management of MSCA: a practitioner's perspective</a>, November 2017</li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	<p>If budget reallocations are required/wanted:</p> <ul style="list-style-type: none"> <li>obtain relevant cost data from the partners concerned</li> <li>calculate the updated budget</li> <li>verify if the change requires a GA amendment</li> </ul> <p>complete the appropriate process for approval of the budget change in accordance with the GA and the CA</p>	FINANCE, ADMIN, LEGAL	<ul style="list-style-type: none"> <li><a href="#">Best practices in budgeting</a>, September 2018</li> <li><a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li><a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li><a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> <li><a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li><a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> <li><a href="#">Financial management of MSCA: a practitioner’s perspective</a>, November 2017</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">H2020 Online Manual – Amendments to the Grant Agreement</a></li> <li><a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> </ul>
Amendments to the Grant Agreement	Proactively monitor potential needs for amendments to the Grant Agreement	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li><a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li><a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li><a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">H2020 Online Manual – Amendments to the Grant Agreement</a></li> <li><a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> </ul>
	<p>Discuss potential amendment issues:</p> <ul style="list-style-type: none"> <li>with the particular partner(s) concerned</li> <li>with the consortium as a whole with the EC (Project Officer / Legal &amp; Financial Officer)</li> </ul>	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li><a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li><a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li><a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">H2020 Online Manual – Amendments to the Grant Agreement</a></li> <li><a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	If an amendment is required, complete the appropriate process for GA amendments in accordance with the GA and the CA	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual – Amendments to the Grant Agreement</a></li> <li>• <a href="#">H2020 Annotated Model Grant Agreement (AGA)</a></li> </ul>
Amendments to the Consortium Agreement	Proactively monitor potential needs for amendments to the Consortium Agreement	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li>• <a href="#">Conducting smooth consortium agreement negotiations (as a coordinator) of a H2020 project</a>, February 2018</li> <li>• <a href="#">Practical comments for DESCA model Consortium Agreement for Horizon 2020</a>, March 2016</li> </ul>	
	Discuss potential amendment issues: <ul style="list-style-type: none"> <li>• with the particular partner(s) concerned</li> <li>• with the consortium as a whole</li> </ul>	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li>• <a href="#">Conducting smooth consortium agreement negotiations (as a coordinator) of a H2020 project</a>, February 2018</li> <li>• <a href="#">Practical comments for DESCA model Consortium Agreement for Horizon 2020</a>, March 2016</li> </ul>	

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	If an amendment is required, complete the appropriate process for CA amendments in accordance with the CA	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li>• <a href="#">Conducting smooth consortium agreement negotiations (as a coordinator) of a H2020 project</a>, February 2018</li> <li>• <a href="#">Practical comments for DESCA model Consortium Agreement for Horizon 2020</a>, March 2016</li> </ul>	
Non-performing partners	Use "soft" management and communication skills to motivate the partner to perform its assigned tasks	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Financial management of cross-border European research projects: what are the practitioner's needs?</a>, June 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> </ul>	
	If necessary, employ formal procedures provided by the GA and the CA to enforce compliance. Consult the Funding Authority. Involve the Consortium members in accordance with GA and CA provisions.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li>• <a href="#">Grant Agreement Preparation</a>, March 2015</li> <li>• <a href="#">Grant agreement preparation (French experience)</a>, March 2015</li> <li>• <a href="#">Conducting smooth consortium agreement negotiations (as a coordinator) of a H2020 project</a>, February 2018</li> <li>• <a href="#">Misconduct and bankruptcy: how is it dealt with under H2020, practical consequences for the project?</a>, February 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Termination of partner participation	Employ formal procedures provided by the GA and the CA to enforce compliance. Consult the Funding Authority. Involve the Consortium members in accordance with GA and CA provisions.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Essentials of the Grant Agreement and Consortium Agreement</a>, March 2015</li> <li>• <a href="#">Conducting smooth consortium agreement negotiations (as a coordinator) of a H2020 project</a>, February 2018</li> <li>• <a href="#">Misconduct and bankruptcy: how is it dealt with under H2020, practical consequences for the project?</a>, February 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>
Adding partners	Update the assignment of tasks and deliverables to the relevant partners.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Register in the Participant Register</a></li> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>
	Recalculate and reallocate budget, and align the revised project plan (Annex 1) and the revised consortium budget (Annex 2)	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> <li>• <a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>
Replacing partners	Update the assignment of tasks and deliverables to the relevant partners.	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Register in the Participant Register</a></li> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>



Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Recalculate and reallocate budget, and align the revised project plan (Annex 1) and the revised consortium budget (Annex 2)	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">Best practices in budgeting</a>, September 2018</li> <li>• <a href="#">Budgeting at the proposal stage for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners</a>, June 2018</li> <li>• <a href="#">Financial management of H2020 projects for beginners: Tips and tricks</a>, June 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>
Project extension	If technically necessary and financially possible try to prepare and apply for a cost-neutral extension of the project well in time	ADMIN, FINANCE, LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Amendments to the Grant Agreement</a></li> </ul>



Just click on the arrow if you would like to navigate directly to one of the other stages!

## 5. The project end

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Final meeting	Organising the final project meeting	ADMIN, FINANCE, LEGAL		
	Adapting or adjusting CA, NDAs, Joint ownership agreements and other existing agreements. Consider whether the period needs to be discussed or extended.	LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - IP management in Horizon 2020: project implementation and conclusion</a></li> <li>• <a href="#">IP Helpdesk - IP joint ownership</a></li> <li>• <a href="#">IP Helpdesk - Non-disclosure agreement: a business tool</a></li> </ul>
	If relevant, plan and discuss follow-up projects	ADMIN, FINANCE		

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
Final reporting	Collecting all necessary information from partners and then elaborating & submitting the final report	ADMIN, FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The coordinator's survival kit: financial topics</a>, September 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> <li>• <a href="#">Managing FP7 and H2020 projects: Guide to best practice – financial issues</a>, April 2016</li> <li>• <a href="#">Financial management of MSCA: a practitioner's perspective</a>, November 2017</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">H2020 Online Manual - Final report</a></li> </ul>
Ensuring the sustainability	Applying the already defined measures, actions which can contribute to the sustainability of the project	ADMIN, FINANCE, LEGAL		
	Review and adaption of licensing agreements and other agreements for the exploitation of results	LEGAL	<ul style="list-style-type: none"> <li>• <a href="#">IPR clauses in licence agreements</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - The Plan for the Exploitation and Dissemination of Results in Horizon 2020</a></li> <li>• <a href="#">IP Helpdesk - Commercialising Intellectual Property: Licence Agreements</a></li> <li>• <a href="#">IP Helpdesk - Intellectual Property Valuation</a></li> </ul>
	Continuous monitoring of publication activities	ADMIN	<ul style="list-style-type: none"> <li>• <a href="#">Publications and open access – the obligation to disseminate project results vs. obligation to protect the project results</a></li> <li>• <a href="#">Knowledge transfer and applicable tools</a>, September 2018</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - Open Access to scientific publications and research data in Horizon 2020: Frequently Asked Questions (FAQs)</a></li> <li>• <a href="#">IP Helpdesk - Publishing v. patenting</a></li> </ul>

Overall task /Task group (Target group: PI)	Specific task (Target group: Adviser / Admin. officer)	Area of expertise	Relevant BESTPRAC product(s)	Other relevant tools?
	Ensuring the continuity and financing of the project web site	ADMIN, FINANCE		
	Ensuring access rights	ADMIN, LEGAL		<ul style="list-style-type: none"> <li>• <a href="#">IP Helpdesk - IP management in Horizon 2020: project implementation and conclusion</a></li> </ul>
Payments of EU funding	Transfer payment of the balance of EU funding to the partners in accordance with the Grant Agreement, Consortium Agreement and EC acceptance of costs.	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The coordinator's survival kit: financial topics</a>, September 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> </ul>	
Collection of excess EU funding	<p>If it turns out that one or more partners have received excess EU funding (more than what has been accepted by the EC after the final periodic report), collect the excess funding from this/these partner(s).</p> <p>The excess funding must then be distributed to other partners or returned to the EC, depending on the net balance of disbursed EU funding vs. accepted funding for the consortium as a whole.</p>	FINANCE	<ul style="list-style-type: none"> <li>• <a href="#">The Coordinator's survival kit for H2020 projects: the financial toolbox</a>, September 2018</li> <li>• <a href="#">What does it mean to be a H2020 coordinator?</a>, February 2018</li> <li>• <a href="#">The coordinator's survival kit: financial topics</a>, September 2018</li> <li>• <a href="#">Financial Management of H2020 Projects: Guide to Best Practice</a>, April 2019</li> </ul>	

## Contributors

### Authors, in alphabetical order

Per Inge Andresen, NTNU - Norwegian University of Science and Technology, Trondheim, Norway

Dirk De Craemer, Ghent University, Gent, Belgium

Sarah Dello, Ghent University, Gent, Belgium

Barbara Dorić, University of Ljubljana, Faculty of Mathematics and Physics, Ljubljana, Slovenia

Bojana Obradovic Kuzminov, University of Belgrade, Belgrade, Serbia

Vanessa Ravagni, University of Trento, Trento, Italy

Wolfram Rieneck, Medical University Innsbruck, Innsbruck, Austria

Marija Šola Spasić, University of Belgrade, School of electrical engineering, Belgrade, Serbia

Virág Zsár, HÉTFA Research Institute and Center for Economic and Social Analysis, Budapest, Hungary

### Editor

Per Inge Andresen, NTNU - Norwegian University of Science and Technology, Trondheim, Norway