FP7 Project management training session
Amman, 17 June 2013

Agenda

• Innovation in the Euro- mediterranean Region
• Project Management and Project Reporting in FP7
• Legal & Financial Rules of FP7
• Tools SESAM and FORCE
• Budget Example
• Financial errors in FP7
• Form C Example
• Financial Audits in FP7

Antonio Skarmeta
Maria Sánchez-Merenciano – University of Murcia
European Opportunities for Research and Innovation in the Euro-Mediterranean Region

Jordan, June 2013
¿What’s Operum?

Operum is the European and International Research Project Office of University of Murcia

**Function:** To inform and advice the University of Murcia (UM) Research Groups about European and International RTD Projects

**Dissemination and Advice Section**

**Management Section**

**Objective:** To increase the number of European Proposals submitted to 7PM and to increase returns from UM participation in European and International Research Programmes
Operum: http://www.um.es/operum/

La Oficina de Proyectos Europeos e Internacionales de la UMM (OPERUM) nace de la iniciativa del Vicerrectorado de Investigación para fomentar la participación de los grupos de investigación en los programas internacionales — especialmente en el Índice Programa Marco de la Unión Europea.

OPERUM tiene por objeto ofrecer información y asesoramiento a los grupos de investigación de la Universidad de Murcia, sobre todos los aspectos relacionados con la participación en Proyectos Europeos de I+D+i bajo los diferentes vertientes:

- Divulgación, Promoción y Difusión de la participación
- Gestión y Seguimiento

DESTACADO

- [1er. Jornadas de Proyectos Europeos (OECE): Presentación del Instrumento de Investigación en beneficio de las PYMES. Más información](#)
- El proyecto INFRASTRONDO (INFRASTRUCTURES) busca incluir 6 nuevos países en el consorcio. Más información.
- Se encuentran abiertas 2 licitaciones de interés para el Programa "Safer Internet". Más información.

NOTICIAS

- [29-04-2010] La innovación, elemento clave de la nueva estrategia "Europa 2020"
- [17-03-2010] Convocatoria: Acción preparatoria relativa a una capacidad de respuesta rápida de la UE
- [09-03-2010] España fortalece la cooperación en Enviroment entre los países euromediterráneos
- [08-03-2010] La Comisión Europea lanza un debate público sobre la protección de los bosques europeos
I. The State of play:
   • FP7 Seventh Framework Programme for R&D
   • ENPI

II. What can we expect in the future?
   • Horizon 2020
   • ENI
FP7 is the European Union’s main instrument for funding research in Europe between 2007 and 2013. The Specific Programmes constitute the five major building blocks of FP7:

- **Cooperation** – Collaborative Research
- **Ideas** – Frontier Research
- **People** – Human Potential
- **Capacities** – Research Capacities
- **Nuclear Research**
# Structure of FP7 (II)

<table>
<thead>
<tr>
<th>Cooperation (32,413 M€)</th>
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<tr>
<td>Health (6,100)</td>
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<tr>
<td>KBBE (1,935)</td>
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<td>ICT (9,050)</td>
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<tr>
<td>NMP (3,475)</td>
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<tr>
<td>ENV. (2,350)</td>
</tr>
<tr>
<td>Energy (1,890)</td>
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<tr>
<td>Trans (4,160)</td>
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<tr>
<td>SSH (623)</td>
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<tr>
<td>Space (1,430)</td>
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<td>Secur (1,400)</td>
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## Capacities (4,097 M€)

<table>
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<tr>
<th>Research Infrastructures (1,715)</th>
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<tr>
<td>Research for the benefit of SMEs (1,336)</td>
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<tr>
<td>Regions of knowledge (126)</td>
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<tr>
<td>Research Potential (340)</td>
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<tr>
<td>Science in Society (330)</td>
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<td>Research Policies (70)</td>
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<tr>
<td>International Cooperation (180)</td>
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## European Research Council

- IDEAS (7,510)
- PEOPLE (4,750)
- JRC (1,751)
Who can participate in a FP7 project?

At least 3 different research groups from Member or Associated States

EU-27
Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Ireland, Latvia, Lithuania, Luxemburg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, UK

Associated Countries (FP7)
Albania, Bosnia and Herzegovina, Croatia, FYR Macedonia, Iceland, Israel, Liechtenstein, Montenegro, Norway, Serbia, Switzerland, Turkey

Third country partners are eligible, in addition to the minimum requirements. International Co-operation Partner Countries (ICPC) may receive funding
ICPCs: International Cooperation Partner Countries
Who is eligible for funding?

EU-27
Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Ireland, Latvia, Lithuania, Luxemburg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, UK

Associated Countries (FP7)
Albania, Bosnia and Herzegovina, Croatia, FYR Macedonia, Iceland, Israel, Liechtenstein, Montenegro, Norway, Serbia, Switzerland, Turkey

ICPCs International Cooperation Partner Countries

Other countries but with NO FUNDING from the EU
People. Marie Curie Individual Actions

• … are a significant EU fellowships programme since the early 1990s

• … support the mobility, training and career development of researchers of all nationalities

• … fund all domains of research (bottom-up approach) and the financing rate is 100%

• …are suited for Experienced Researcher ER: In possession of a doctoral degree or at least 4 years of research experience (counted from the time when the individual is entitled to embark on a doctoral degree) "post-doc"
People: Marie Curie Actions
Budget 2013

Marie Curie Indiv. Actions 2013: 263 M€

IEF
Intra-European Fellowships

IIF
International Incoming Fellowships

IOF
International Outgoing Fellowships

CIG
Career Integration Grant

Marie Curie Indiv. Actions 2013: 263 M€
People

International Incoming Fellowships

Experienced researchers **of any nationality**

**International mobility** to Member States (MS) and Associated Countries (AC) from a third country

Normally **researchers with a more senior profile**

Applicants **must comply** with the **rules for mobility**:

- They **must demonstrate mobility** from a third country
- They must not have resided or carried out their main activity in Europe **for more than 12 months in the 3 years** immediately prior to the call deadline

**Project Duración:** 12-24 months

**Possible Return Phase** for researchers from International Cooperation Partnership Countries **ICPC (International Co-operation Partner Countries)**  
Lump sum: **15,000 euros**. The return phase will normally commence not later than 6 months after the termination of the incoming phase.

**Application submitted** by the ER in conjunction with the host organisation

**Grant agreement** to be issued with the host organisation in MS or AC
Category 1: Monthly Living Allowance
- €58,500 gross salary per ER / year x country coefficient (4-10 years)
- €87,500 gross salary per ER / year x country coefficient (>10 years)

Category 2: Mobility Allowance
- €1,000 – €700 (family or not) per researcher month x country coefficient

Category 3: Contribution to Research, training and Transfer of Knowledge
- €800 per researcher month
- Flat-rate cost category

Category 5: Overheads (and management)
- €700 per researcher month x country coefficient
- Flat-rate cost category

IIF Return Phase for expenses related to the integration of the researcher in the host institution
Flat rate of EUR 15 000 per researcher/year during the period of reintegration up to a maximum of 1 year - Not subject to country correction coefficient
Published vacancies in funded projects

Published vacancies in funded projects

Information on Marie Curie Actions

Funded projects

Calls currently open

Apply here!

Euraxess

www.ec.europa.eu/mariecurieactions
EURAXESS: Researchers in Motion (I)

What is EURAXESS?

✓ EURAXESS is an ERA key initiative to promote research careers and facilitate the mobility of researchers across Europe.
✓ EURAXESS: European Union & 40 countries in Europe working together to assist researchers and research organisations!

The 4 key initiatives

Euraxess JOB: Information about jobs & funding opportunities
Euraxess SERVICES: Personalised assistance to researchers & their families through a network of > 500 people in 40 countries
Euraxess RIGHTS: Information about rights and obligations of researchers, their employers and funders, including entry conditions, social security and pensions
Euraxess LINKS: Networking tool for European & non-EU researchers worldwide
Three interdependent objectives
– **to support European competitiveness** through strategic partnerships with third countries in selected fields of science and by engaging the best third country scientists to work in and with Europe,
– **to facilitate contacts with partners in third countries** with the aim of providing better access to research carried out elsewhere in the world,
– **to address specific problems that third countries face** or that have a global character, on the basis of mutual interest and mutual benefit.
Title: The National Centre for Research and Development (NCRD) as a Centre of Excellence for EU-Jordan S&T Cooperation: Towards Jordan's Integration into ERA

Start date: 01/08/2012  Duration: 24 months.  
Project Funding: aprox. 500.000€

Objective: To contribute to the effective integration of Jordan into ERA, through building the National Centre for Research and Development (NCRD) organisational, strategic and human capacities to actively participate in European S&T partnerships and execute large-scale projects in the key area of Renewable Energy, with a view to creating a centre of excellence within Jordan and actively promoting further dissemination and replication in the region.

Partners:  
National Energy Research Centre –NERC Jordan. Coordinator  
The University of Alicante - UA  
The University of Murcia- UM  
University of Applied Sciences Technikum Vienna - UASTV
New strategy for International Cooperation in Research and innovation

Need to engage more actively and strategically in international cooperation:

✓ Three main objectives:
  1. Strengthen the Union's excellence and attractiveness in research and innovation as well as its industrial and economic competitiveness
  2. Tackle global societal challenges
  3. Support the Union's external policies

✓ Combining openness with better targeted actions

✓ Strengthened partnership with Member States

✓ Stronger contribution of research and innovation to external policies of the Union
The multilateral cross-border cooperation "Mediterranean Sea Basin Programme" is part of the European Neighbourhood Policy (ENP) and of its financing instrument (European Neighbourhood and Partnership Instrument - ENPI) for the 2007-2013 period.

**MAIN AIM:** Reinforcing cooperation between the European Union (EU) and partner countries regions placed along the shores of the Mediterranean Sea.

**Participants:** 14 countries, which represent 76 territories and 110 million people.
Eligible Territories

Eligible Regions

Adjoining Regions
Eligible Territories

1. **Spain**: Andalucia, Catalunia, Comunidad Valenciana, Murcia, Illas Baleares, Ceuta, Melilla
2. **Portugal**: Algarve
3. **France**: Corse, Languedoc-Roussillon, Provence-Alpes-Côte d’Azur
4. **Italy**: Basilicata, Calabria, Campania, Lazio, Liguria, Puglia, Sardegna, Sicilia, Toscana
5. **Malta**: the entire territory
6. **Greece**: Anatoliki Makedonia – Thranki, Kentriki Makedonia, Thessalia, Ipeiros, Ionia Nisia, Dytiki Ellada, Sterea Ellada, Peloponnisos, Attiki, Voreio Aigaio, Kittí, Notio Aigaio
7. **Cyprus**: the entire territory
8. **Tunisia**: Médenine, Gabès, Sfax, Mahdia, Monastir, Sousse, Nabeul, Ben Arous, Tunis, Ariana, Bizerte, Béja, Jendouba
9. **Egypt**: Marsa Matruh, Al Iskandanyah, Al Buhayrah, Kafr ash Shaykh, Ad Daqahliyah, Dumyat, Ash Sharquiyyah, Al Isma’ilyyah, Bur Sai’id, Shanal Sina’
10. **Israel**: the entire territory
11. **Lebanon**: the entire territory
12. **Syria**: Latakia, Tartous
13. **Jordan**: Irbid, Al-Balga, Madaba, Al-Karak, Al-Tafila, Al-Aqaba
14. **Palestinian Authority**: the entire territory

**ADJOINING REGIONS**: the participation of actors coming from Regions adjoining to the eligible territories is envisaged, within the limit of 20% of the project budget. These actors can not play in any case the role of Lead Partner.
# The strategic framework: priorities and measures

<table>
<thead>
<tr>
<th>PRIORITIES</th>
<th>MEASURES</th>
<th>BUDGET ALLOCATION</th>
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<tbody>
<tr>
<td>1. Promotion of socio-economic development and enhancement of territories</td>
<td>1.1 Support to innovation and research in the process of local development of the Mediterranean Sea Basin countries</td>
<td>68,748,500 € 40%</td>
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<td>1.2 Strengthening economic clusters creating synergies among potentials of the Mediterranean Sea Basin countries</td>
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<td></td>
<td>1.3 Strengthening the strategies of territorial planning by integrating the different levels, and promotion of socio-economic development</td>
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<tr>
<td>2. Promotion of environmental sustainability at the basin level</td>
<td>2.1 Prevention and reduction of risk factors for the environment and enhancement of natural common heritage</td>
<td>51,561,375 € 30%</td>
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<td>2.2 Diffusion of renewable energies and improvement in energy effectiveness to contribute addressing climate change</td>
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<td>3. Promotion of better conditions and modalities for ensuring the mobility of persons, goods and capitals</td>
<td>3.1 Support to people flows among territories as a means of cultural, social and economic enrichment</td>
<td>17,187,125 € 10%</td>
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<tr>
<td></td>
<td>3.2 Improvement of conditions and modalities of circulation of goods and capitals among the territories</td>
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<tr>
<td>4. Promotion of cultural dialogue and local governance</td>
<td>4.1 Support to mobility, exchanges, training and professionalism of young people</td>
<td>34,374,250 € 20%</td>
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<td></td>
<td>4.2 Support to the artistic creativity in all its expressions to encourage dialogue among communities</td>
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<td></td>
<td>4.3 Improvement of governance processes at local level</td>
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What can I do at this time?

Be ready for Horizon 2020 (2014-2020)

Be ready for ENI (2014-2020)
HORIZON 2020

the EU framework programme
for research and innovation
What is Horizon 2020?

Commission proposal for a 80 billion euro research and innovation funding programme 2014-2020

A single programme bringing together mainly two separate programmes/initiatives: The 7th research Framework Programme (FP7), innovation aspects of Competitiveness and Innovation Framework Programme (CIP)

More innovation, from research to retail, all forms of innovation
Focus on societal challenges facing EU society, e.g. health, clean energy and transport

Simplified access, for all companies, universities, institutes in all EU countries and beyond.
Three priorities of Horizon 2020:

I. Excellent science: ERC and Marie Curie Actions

II. Industrial leadership: Innovation in SMEs

III. Societal challenges: Health, Food, Energy, Transport, Climate actions
International Cooperation in Horizon 2020

✓ General opening
✓ Targeted activities in **Societal challenges and Industrial leadership**
  • Projects with required or preferential 3rd country participation
  • Joint calls, delegated management, ERA-NET, Art 185
✓ Excellent science
  • Marie Skłodowska-Curie Fellowships: strong international dimension
  • Development of global research infrastructures (Carnegie Group)
  • ERC open to researchers from all over the world - research to be carried out mostly in Member States or Associated Countries
✓ Dedicated cross-cutting actions – Inclusive, Innovative and Secure Societies challenge
  • Support for policy dialogue
  • Networking and twinning activities
  • Coordination of EU and MS/AC international cooperation policies

Strengthening of European presence in international partner countries
Barcelona, 2-3 April 2012

**Strengthening Innovation in the Mediterranean Region**

- Make Euro-Mediterranean Cooperation a top innovation policy priority within the 2020 Horizon
- Make knowledge-based economic development in the Euro-Med a subsequent top priority
- Job creation through innovation and entrepreneurship

**Coordination of Research and Innovation Programmes and Funding Instruments**

- Optimizing the use of programmes and funding instruments covering the Research and Innovation Chain
- Coordination and synergies of bilateral programmes
- Toward a regional programme for Research and Innovation Definition of the medium and long term Agenda of Euro/Mediterranean Partnership in Research and Innovation
What can we expect from ENI CBC Med?

Period: 2014-2020

Priorities similar to ENPI CBC Med

New eligibles territories: Libya and Morocco
Links

Operum [http://www.um.es/operum/](http://www.um.es/operum/)


