Europa Media Trainings

Horizon Europe: Insights to get you started – LinkedIn Live event

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22 June 2020
14:00 – 14:30 CEST

Linked in

SPEAKER

Gabriella Lovasz

- Contact me on LinkedIn
  (but send a note on who you are)

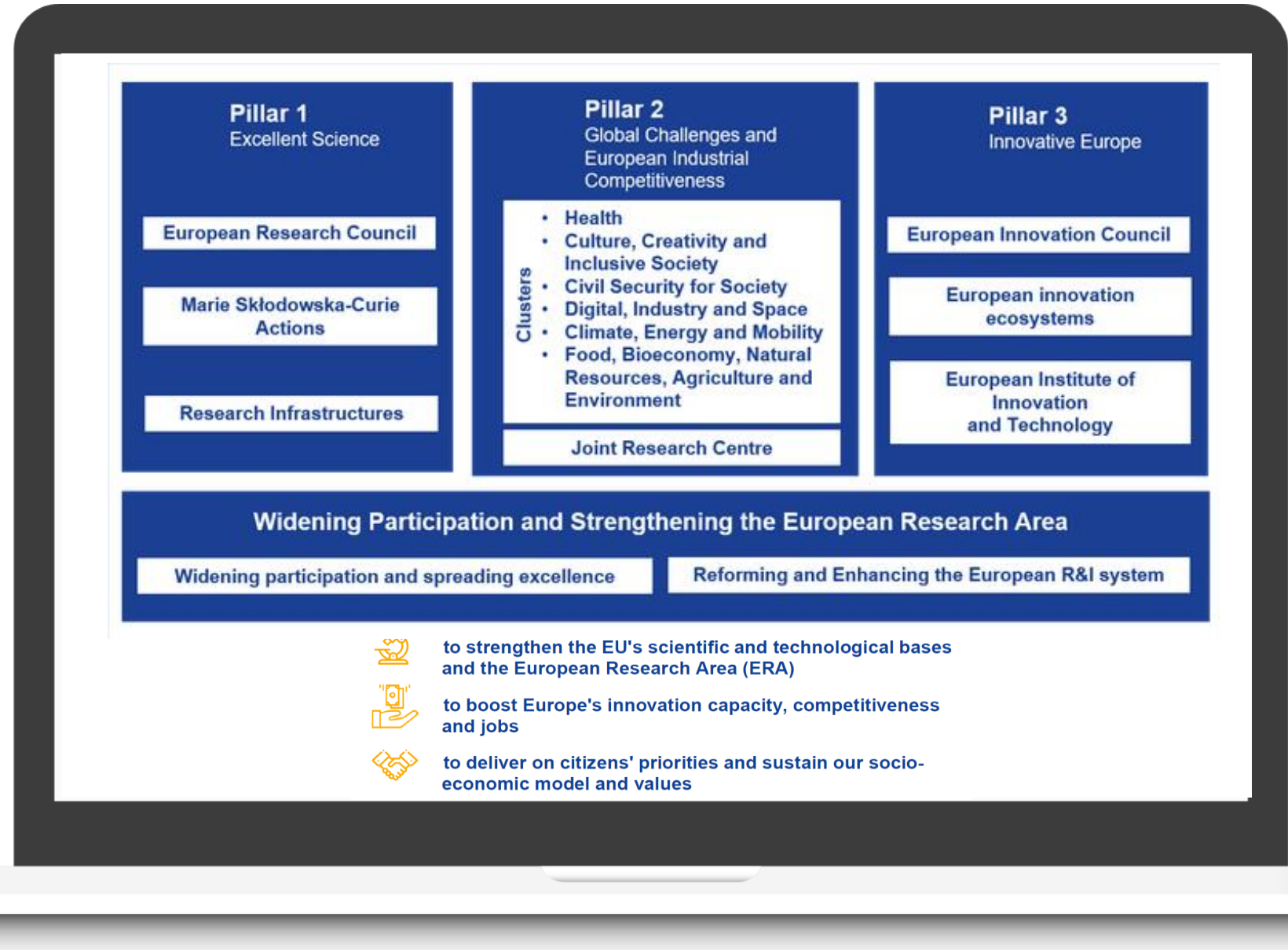- On Twitter as @gabocsek

- Write to gabriella.lovasz@europamedia.org

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Horizon Europe
The 3 Pillars

Pillar 1
Excellent Science

- European Research Council
- Marie Skłodowska-Curie Actions
- Research Infrastructures

Pillar 2
Global Challenges and European Industrial Competitiveness

Clusters
- Health
- Culture, Creativity and Inclusive Society
- Civil Security for Society
- Digital, Industry and Space
- Climate, Energy and Mobility
- Food, Bioeconomy, Natural Resources, Agriculture and Environment

Joint Research Centre

Pillar 3
Innovative Europe

- European Innovation Council
- European innovation ecosystems
- European Institute of Innovation and Technology

Widening Participation and Strengthening the European Research Area

| Widening participation and spreading excellence | Reforming and Enhancing the European R&I system |

to strengthen the EU's scientific and technological bases and the European Research Area (ERA)

to boost Europe's innovation capacity, competitiveness and jobs

to deliver on citizens' priorities and sustain our socio-economic model and values

Innovation Budget

INNOVATION & COMPETITIVENESS

- **1.6-fold** increase of the funding for research, innovation and digital to enable Europe to keep up with its global competitors.
- **€650 billion** of investments will be leveraged under the InvestEU Programme.
- **Horizon Europe:** largest envelope ever for research and innovation.
- **Cohesion policy:** thematic concentration requirements to dedicate funding to "a smarter Europe".
- **Digital Europe:** new dedicated programme to embrace digital transformation.

- HEU = € 100 billion
- Digital Europe = € 9 billion
- InvestEU = € 200 billion R&I
- SMEs = € 215 billion

https://ec.europa.eu/info/sites/info/files/factsheet-modern-eu-budget-future-challenges.pdf

A few interesting things about HEU

Widening participation and strengthening the ERA

Horizontal activities:

- Evidence and foresight
- Open Science
- Policy Support Facility
- Supporting research careers
- Emphasis on citizen science
- RRI
- Gender equality

→ *3,3% of Horizon Europe budget*
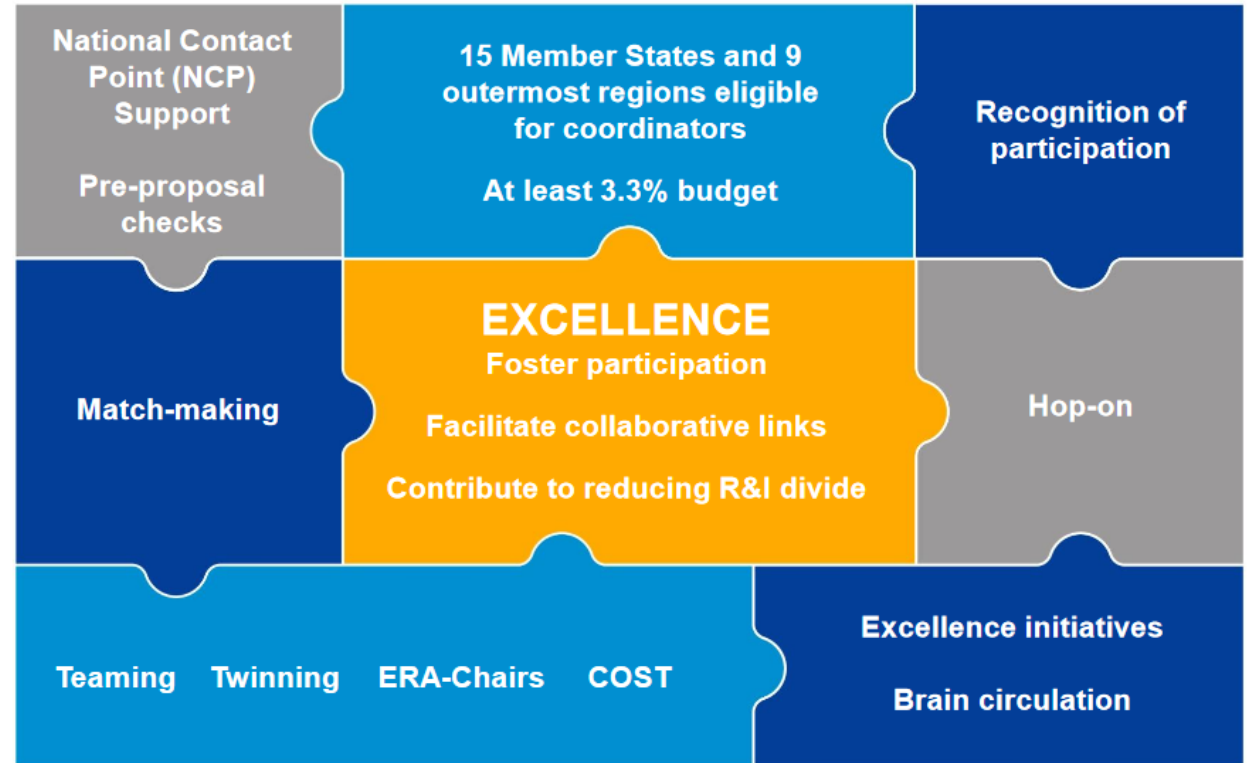
Clusters in Horizon Europe
Connections with Intervention Areas

- Social sciences and humanities will be integrated across all clusters

- Research and Innovation is grouped into integrated clusters of activities

- No thematic set of clusters is intended for one set of actors from scientists to innovators, to businesses.

- Orientation paper from December 2019
  - Objectives
  - Cross-cluster issues
  - International cooperation
  - European Partnerships
  - Innovation procurement

- HEU specific programme lists the specific Areas of Intervention

Source https://www.researchgate.net/
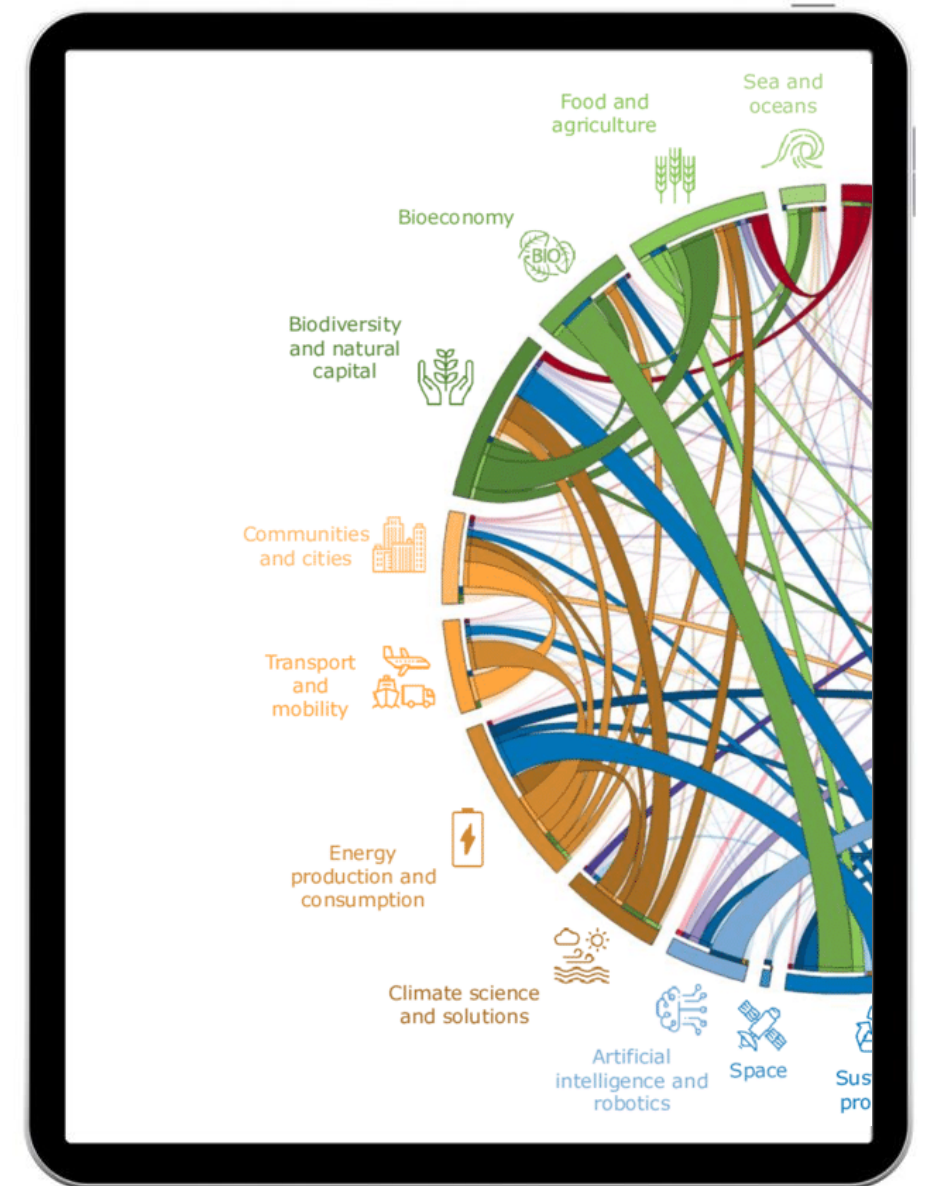
European Innovation Council

Building on existing instruments, simplifying the landscape and bridging gaps

FROM THE CURRENT SITUATION

FET – Future and emerging technologies

ERC – European Research Council

SME Instrument – Phase 1

SME Instrument – Phase 2

SME Instrument – Phase 3

FTI – Fast track to innovation

EFSI
INNOVFIN SME GUARANTEE
INNOVFIN EQUITY

Gap in transition from research to commercial environment.

Gap in financing for scaling up between grants and finance

TO THE EIC IN HORIZON EUROPE

EIC Pathfinder grants
From early research to early/ pre-commercial

EIC Accelerator: grants & blended finance
From early/ pre-commercial to market and scale-up

InvestEU

European Innovation Ecosystems
How to support them

What measures will be adopted to support the European Innovation Ecosystems?
- **co-funding partnership initiatives** (in particular with national innovation agencies)
- **increased use of innovation procurement**

What activities are foreseen?
- **mentoring, coaching, technical assistance and other soft skills**
- **and services for innovative enterprises delivered close to innovators by networks** (EEN, Startup Europe, etc) + INNOSUP actions

New approach to partnerships
& increased collaboration with other EU Programmes

For the first time, an **overall policy approach for all kinds of partnerships**, from ERA-NETs to JTIs, FET Flagships and even the EIT/KICs has been developed and uniformly labelled **'European Partnerships'**.

https://www.era-learn.eu/
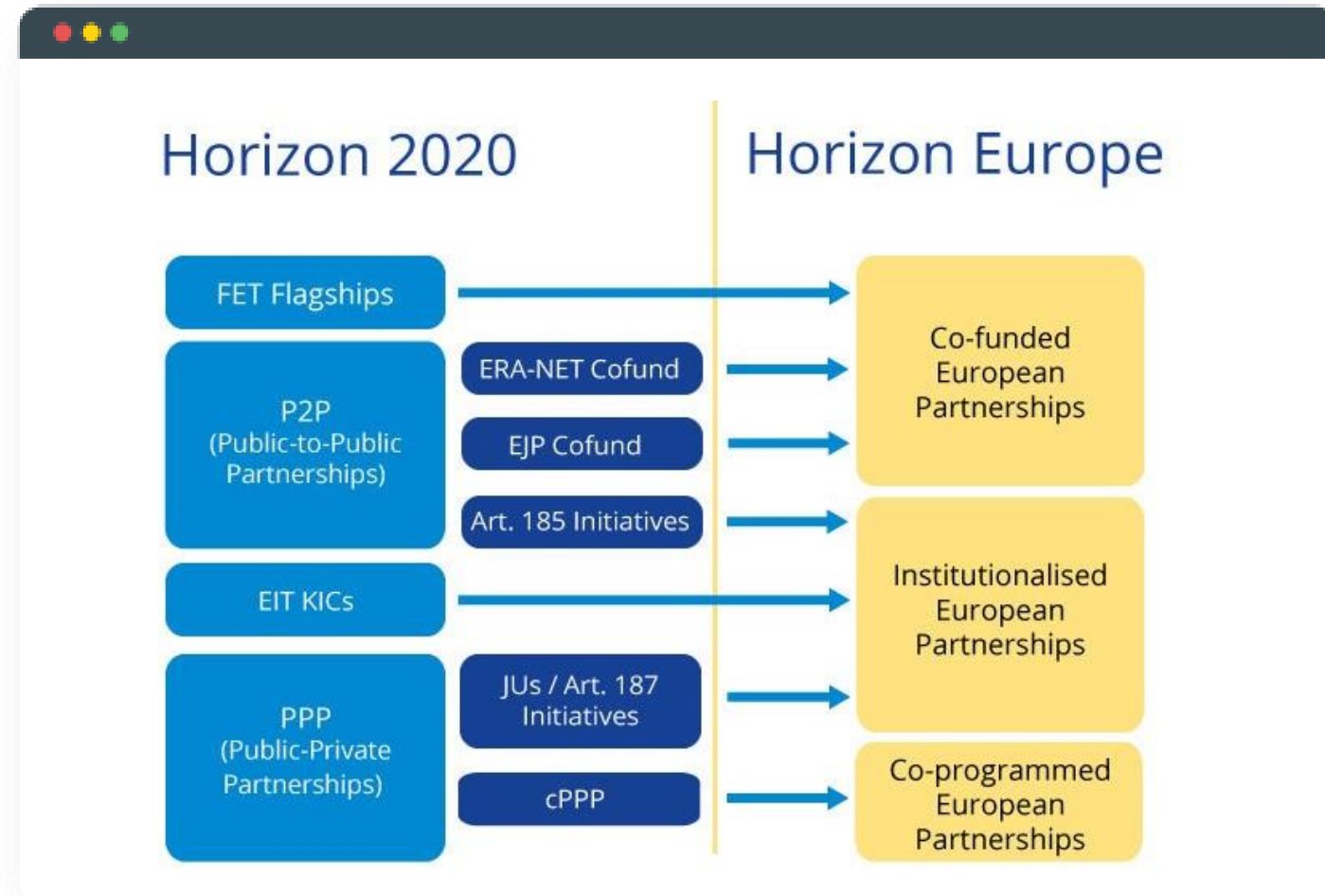
Proposal preparation

Planned changes:

- Emphasis shall be put on non-prescriptive calls for proposals, allowing for multiple ways to achieve the impact (Global Challenges and European Industrial Competitiveness' and the 'Innovative Europe' Pillars)

- More frequent use of multiannual topics, with a choice of submission deadlines spread over more than one year

- In some topics the applicants may be allowed to decide on the most appropriate type of action for achieving the targeted impact

Issues under discussion: Deadline modes

Submission and Evaluation

Planned changes:

- Approaches may vary from mission to mission
- Possible use of 'blind' evaluation in the first stage of two stage procedures
- Further simplifying two-stage
- Possible re-calibration of the scoring system to increase the range above threshold
- Simplification of the number of aspects to be considered
- Potential reduction to max. 50 pages of proposal.

Dissemination and Exploitation

Planned changes:

- Continuous reporting beyond the end of the project on D&E activities and adapting the reporting templates

- Enhanced guidance and support to applicants offered by the EC on dissemination and exploitation strategy.

- Enhanced D&E support to projects based on the reported needs

  - Dissemination & Exploitation boosters

  - IP Booster from META Group

- Horizon Results Platform

- Funding and Tenders Portal

- Focus will be on the timely knowledge diffusion towards the concerned stakeholders

Dissemination and Exploitation

In the Grant Agreement – a new article

Cannot manage to exploit your results within the Grant Agreement period?

Use the online platform which was identified in the Grant Agreement to find interested parties who could exploit those results.

If justified on the basis of a request of the beneficiary, this obligation may be waived.

From „draft MGA"
Personnel cost calculation (Part 1)

Eligible personnel costs are limited to salaries

In Horizon Europe you can:

- include net payments during parental leave, social security contributions, taxes and other costs linked to the remuneration, if they arise from national law or the employment contract (or equivalent appointing act).
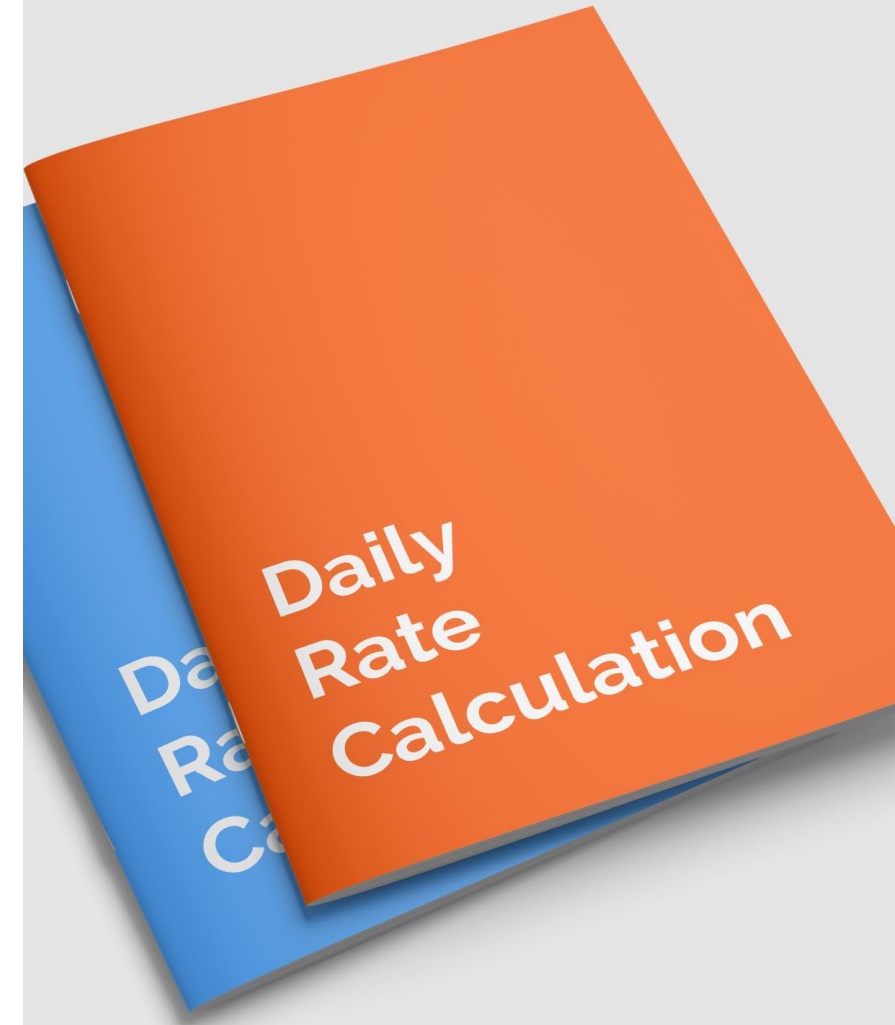
How should it be calculated?

and be calculated as follows:

| Daily rate | ✖ | Days worked |

*{**daily rate for the person** multiplied by **number of actual days** worked on the action (**rounded up or down to the nearest half-day**)}*

From „draft MGA"
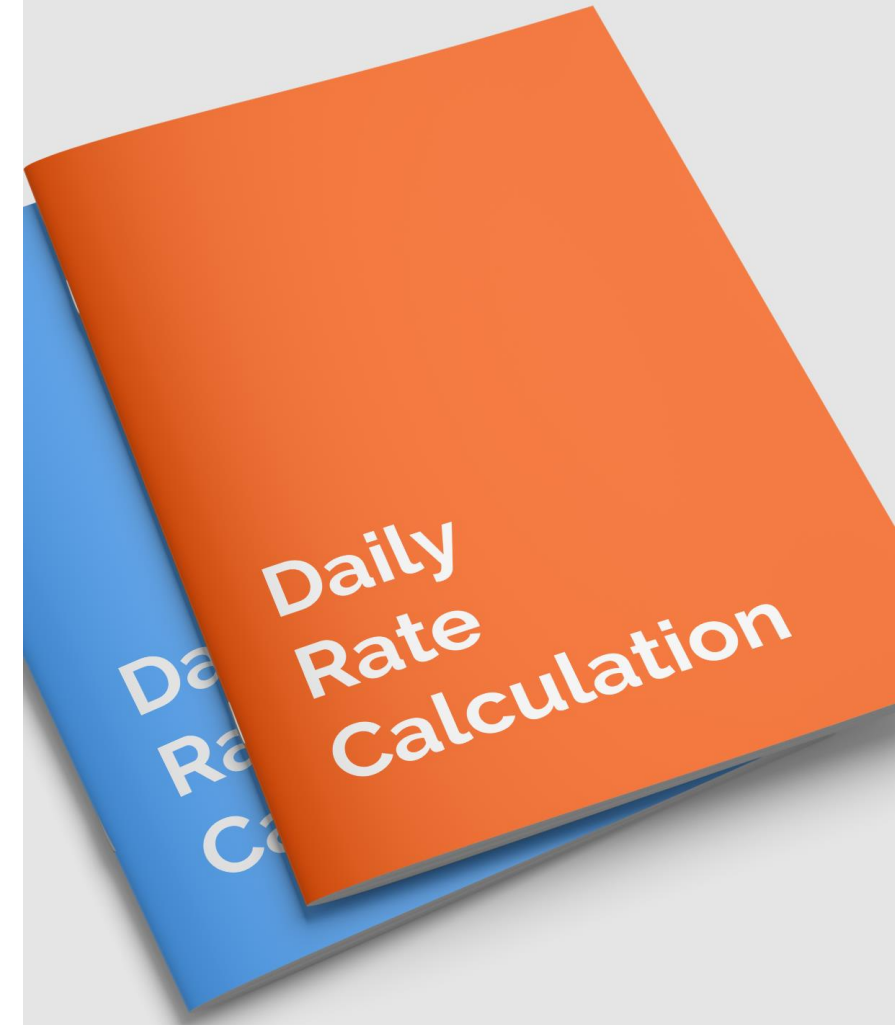## Personnel cost calculation (Part 2)

How to calculate the daily rate?

{annual personnel costs for the person divided by 215}

The number of actual days declared for a person must be identifiable and verifiable.

Daily Rate = annual personnel costs for the person

215

Days worked = Monthly declarations instead of time sheets

System and Process Audit

What is a SPA?

A risk assessment & an audit opinion

in **2** steps:	assessing **3** types of risks:
- Test of the systems/ Tests of controls - Substantive testings/ Tests of transactions HE Rfp Article 48	- Inherent Risk at the level of the entity - Control Risk at the entity level - Budget Category Specific Control Risk and their project based accounting

providing **1** Output:

- One single report in two parts

- Combined review result > flag as Low, Medium or High

Prepare for Horizon Europe

Internal strategy

- The EU research agenda analysis
  e.g. BOHEMIA study and R&I missions – where is your organisation?

- Internal research excellence
  Focus areas to support

- Funding strategy
  Do you remember the complementarities?

- Who should be involved in this discussion?

- How to increase capacities and generate a better environment for fundraising?

- What lobbying can you do?

- How can you increase your visibility? And access to relevant information?

In summary

What is new about Horizon Europe?

- It addresses fundamental science, global challenges and innovation

- Cross-sectoral clusters approach – NEW!

- Missions for more impact and visibility

- Establishment of the European Innovation Council

- Strategic planning

- New approach to partnerships

- New impact monitoring and tracking

- More robust Open Access

- More activities and budget for Widening Participation

- Sources we used:
  - Implementation strategy for Horizon Europe (1.0)
  - Horizon Europe website
  - Long-term 2021-2027 MFF
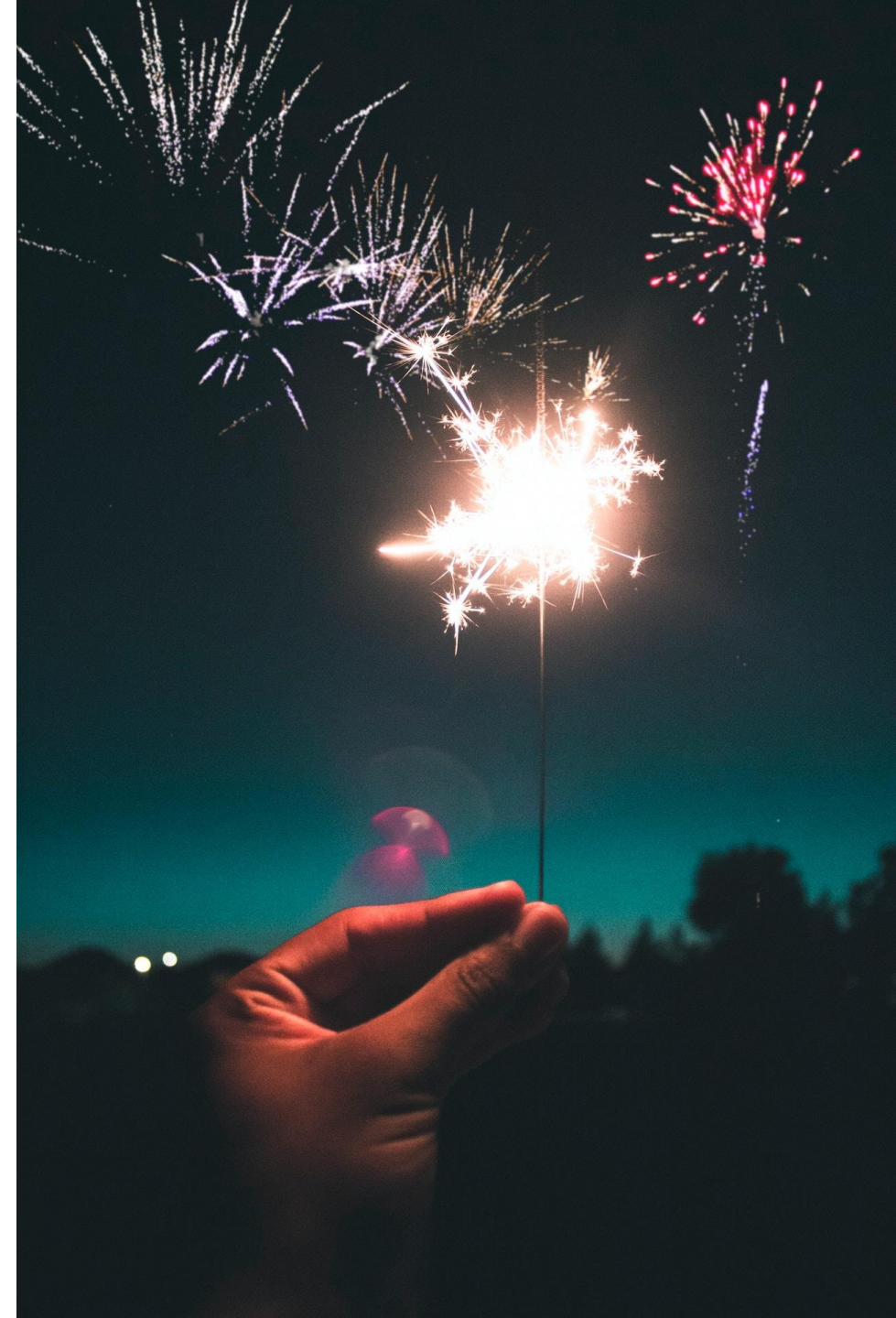
Thank you

for your attention

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