EURAXESS BULGARIA

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Introduction to...

Project Management

...for R1 / R2 Researchers

Topics: career development

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BSc-ENV, MEng-ENV, 6-sigma, NEBOSH, CSTC, Vocational Trainer, IAEM

Opening and Presentation's Programme

Introduction to Project Management for R1/R2 Researchers

At the end of the Training Session, the Trainees are expected to be able to:

- Navigate through the common "Vocabulary" of Project Management, within the context of European Funded Programmes (e.g. Horizon Europe), and to distinguish between Project-, Programme-, Portfolio-, and Operations-Management.
- Define the Role of a Project Manager and to identify the necessary competences and skills as per project.

10.00 - Opening

10.10 - 11.30 - Basics and Definitions in Research Project Management

11.30 - 12.00 - Coffee Break

12.00 - 13.00 - Specifics of Research Project Management Part I

13.00 - 14.00 - Lunch Break

14.00 - 15.00 - Specifics of Research Project Management Part II

Opening – Presenter's Background and Experience

Professional Experience:

- 2000-2005. Laboratory Researcher (Aegean & Stevens)
- 2007-2008. Environment Research Officer (Univ. Nicosia)
- 2008-2017. NCP & PCM FP7 – H2020, CY-RIF: "MSCA" | EURAXESS | "Clima & Env" | Space
- 2017-2021. Cyprus Institute: Head-Project-Manager of TEAMING-CoE-"EMME-CARE"
- **2003-now. >100 projects | various *sizes* | mainly in scientific/ research domain various Roles: Implementer/ Task-Lead/ WP-Lead/ Manager/ Progr. or Portfolio Mngr.**
- **Professional Memberships: PMI CY-Chapter… EARMA P&RC… NCURA… IAEM**

EUC – CERIDES (https://cerides.euc.ac.cy):

- Research & Strategy Manager
- Portfolio/ Project Mngt, Identification of (funding) Opportunities and Networking
- Proposal Writing Support & Mentoring/ Training/ Capacity Build. for EU Grants.

Evaluator Experience: EC-Invited Expert H2020, HEU

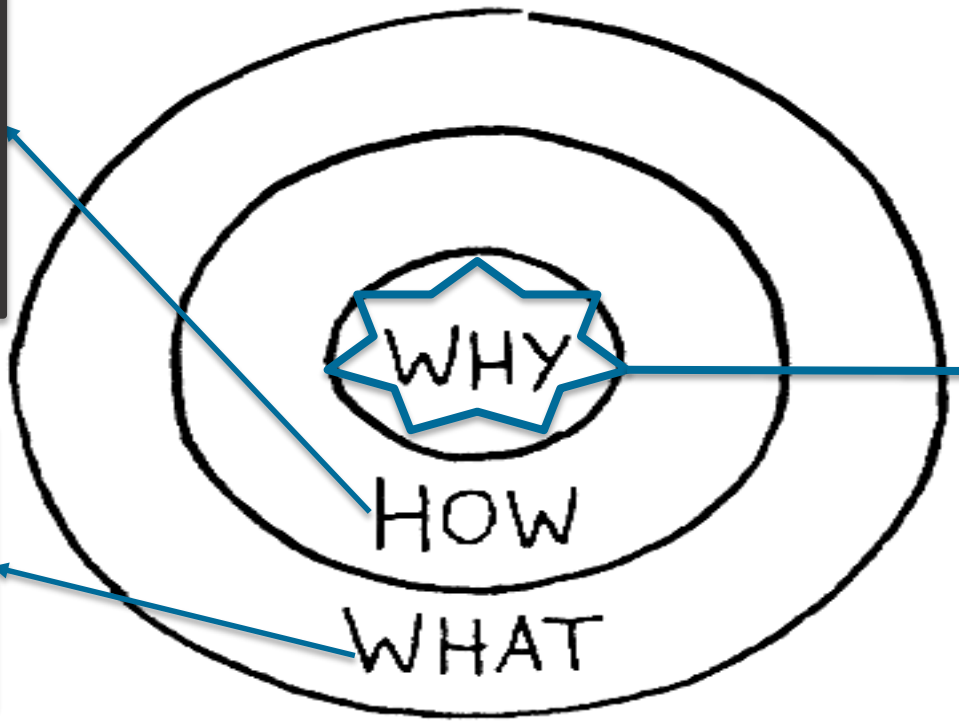
Civil Defence Volunteer Safety Officer, Search-&-Rescue

Opening –
Think about your… "Why"…!

The Golden Circle

EU Research Projects Management

Your Career & Research Objectives



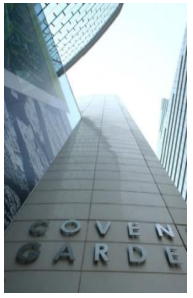
Think about your ***"Why"*** and **write it** down...

©2015 Simon Sinek, Inc. https://www.startwithwhy.com/

Some… ***Truths*** and ***Contextualisations*** before Starting…!

- This is **NOT** a **webinar on Project Management** (in general)… or even an **Introduction-Seminar to Project Management** (in general)…

- This is a **basic Introduction to Research Project Management** within the **context of European-funded Programmes** such as **Horizon Europe…**
  - → **so as to "survive" the 'management' of such funded projects…**!



- and in fact it is an **Introduction targeted to (*R1/R2*) Researchers of earlier career-stages and experience (pre-PhD and/or early post-Doc)…**

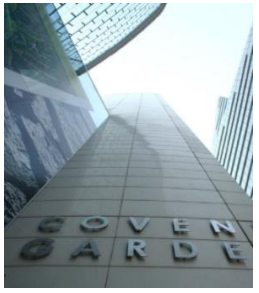
Some… ***Truths*** and ***Contextualisations*** before Starting…!

As such… our main resources here are:

- the European Commission's **Project Management Methodology (PM²)**…
- the Project Management Institute (PMI) **Project Management Body of Knowledge (PMBoK)**…
- the European University Cyprus (EUC) **Project Management Course OSH-625** and its Textbook of Larson & Gray "**Project Management – The Managerial Process**" (McGraw Hill Ed.)

Some… ***Truths*** and ***Contextualisations*** before Starting…!

- **EU-Funded Research-Projects within "Horizon Europe"** are:
  - **NOT Papers/ Articles for Journals**…
  - **NOT "Structural and/or Reform" type Projects**… (even if some may entail infrastructures…)
  - **NOT Subsidies and/or "Direct Assignments"**



- **EU-Funded Research-Projects within "Horizon Europe"** are:
  - **Competitive Grants** awarded via **Review by Experts**, who have received **EC-Guidelines**,
  - written as **Proposals** on pre-formulated **Templates**, and evaluated against pre-set **Criteria**, addressing **Call/Topic-specific Scope and Expected Impact**.

Some… ***Truths*** and ***Contextualisations*** before Starting…!

- when it comes to **EU-Funded Research-Projects within "Horizon Europe"** one should recall that…:
  - the European Commission (EC) has been doing this for quite a few Framework Programmes (FPs)… hence
  - there are **particular policy and mandate backgrounds**,
  - there is a **particular language-jargon**, and there are **well-defined structures and processes**.

Some… ***Truths*** and ***Contextualisations*** before Starting…!

- Project MUST have **EUROPEAN ADDED VALUE**…!

→Problem/Issue to be solved or tech/innovation to be developed **cannot be of local/regional character but rather of pan-European**… scale/complexity of the "solutions" for EU and not "just Country-X".

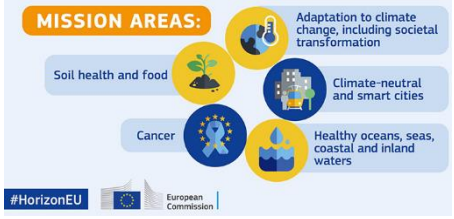
→**Transnationality, replicability, transferability**: keywords for both "challenges"/"problems" addressed, and "solutions" proposed.

- Project should showcase how it contributes to the priorities of:

→ **National Research/ Specialization Strategies**,

→ the **EU GREEN DEAL**,

→ the **EU Green Transition**,



→ as well as how you align with the **EU Missions**…

Truths and *Contextualisations*…! *HORIZON EUROPE*… at a Glance…!

- EU's key funding programme for research and innovation, with Budget of **€95.5 billion for the period 2021 – 2027**.
- **Tackles Climate Change**, helps to achieve the **UN's Sustainable Development Goals** and boosts the **EU's Competitiveness and Growth**, within a **strengthened European Research Area**.
- Facilitates collaboration and strengthens the **impact of R&I** in developing, supporting and **implementing EU policies while tackling Global Challenges**.

Truths and *Contextualisations*…! *HORIZON EUROPE*… at a Glance…!

#HorizonEU

HORIZON EUROPE

SPECIFIC PROGRAMME IMPLEMENTING HORIZON EUROPE & EIT*

Exclusive focus on civil applications

Pillar I
EXCELLENT SCIENCE

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

Pillar II
GLOBAL CHALLENGES & EUROPEAN INDUSTRIAL COMPETITIVENESS

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

Joint Research Centre

Pillar III
INNOVATIVE EUROPE

- European Innovation Council
- European innovation ecosystems
- European Institute of Innovation & Technology*

WIDENING PARTICIPATION AND STRENGTHENING THE EUROPEAN RESEARCH AREA

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

European Commission

Source: European Commission DG RTD

Truths and *Contextualisations*…! *HORIZON EUROPE*… at a Glance…!

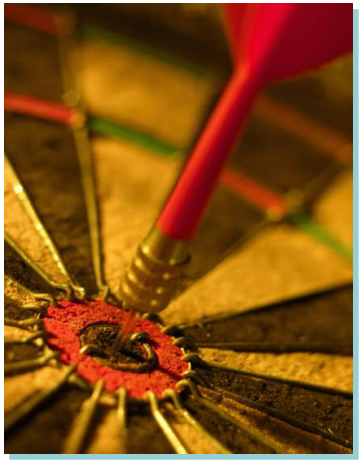
#HorizonEU

Research and innovation action (RIA)	Activities to establish new knowledge or to explore the feasibility of a new or improved technology, product, process, service or solution.
Innovation action (IA)	Activities to produce plans and arrangements or designs for new, altered or improved products, processes or services.
Coordination and support actions (CSA)	Activities that contribute to the objectives of Horizon Europe. This excludes R&I activities, except for 'Widening participation and spreading excellence'
Programme co-fund actions (CoFund)	A programme of activities established or implemented by legal entities managing or funding R&I programmes, other than EU funding bodies.
Innovation and market deployment actions (IMDA)	Activities that embed an innovation action and other activities necessary to deploy an innovation on the market. (EIC)
Training and mobility actions (TMA)	Activities that aim to improve the skills, knowledge and career prospects of researchers, based on mobility between countries and, if relevant, between sectors or disciplines. (MSCA)
Pre-commercial procurement actions/ (PCP)	Activities that aim to help a buyers' group to strengthen the public procurement of research, development, validation and, possibly, the first deployment of new solutions
Public procurement of innovative solutions actions (PPI)	Activities that aim to strengthen the ability of a buyers' group to deploy innovative solutions early

Source: European Commission DG RTD

HEU

Usual EC Research Projects targeting/ involving R1/R2 Researchers



MSCA

Usual EC Research Projects targeting/ involving R1/R2 Researchers

- **Marie Skłodowska-Curie Actions**
  - Pillar – I of "Horizon Europe"
  - Action of "**Postdoctoral Fellowships**" is especially pertinent for Young (R1/R2) Researchers, at the early stages of their Individual Post-Doc Career.
  - Action of "**Doctoral Networks**" entails Young Researchers at PhD-Candidate level

ERC

Usual EC Research Projects targeting/ involving R1/R2 Researchers

European Research Council
Supporting top researchers from anywhere in the world

erc European Research Council
Established by the European Commission

FUNDING | PROJECTS & FIGURES | NEWS & EVENTS | MANAGING YOUR PROJECT | ABOUT ERC

FUNDING

https://erc.europa.eu/funding

STRONG profile: Papers…First-authorships…"Leader" profile…

What do we offer?

On this page you'll find information about our main grants, as well as some additional opportunities for researchers who are thinking of applying. This is also your first port of call if you've decided to apply but you are not sure where to start from.

ERC STARTING GRANTS

These grants are for researchers with 2-7 years of experience since the completion of their PhD, a scientific track record showing great promise and an excellent research proposal.

ERC CONSOLIDATOR GRANTS

These grants are for researchers with 7-12 years of experience since completion of PhD, a scientific track record showing great promise and an excellent research proposal.

ERC ADVANCED GRANTS

These grants are for active researchers with a track-record of significant research achievements in the last 10 years.

ERC PROOF OF CONCEPT

These grants are for researchers who have already received an ERC grant for their frontier research project and now want to explore the commercial or societal potential of it.

ERC SYNERGY GRANTS

These grants are for two to maximum four researchers working together and bringing different skills and resources to tackle ambitious research problems.

ADDITIONAL OPPORTUNITIES

There are other initiatives linked to ERC funding. If you are not planning to apply for a grant, or it's too early to, you may still be interested in these.

COST

Usual EC Research Projects targeting/ involving R1/R2 Researchers

→ **COST** is an **EU-funded programme** enabling researchers to set up their **interdisciplinary research networks** in Europe and beyond. http://www.cost.eu/COST_Actions/networking

Funds for: **organising conferences, meetings, training schools** (3-15 days; €1500), short **scientific exchanges** (5-180 days; €2500-3500) or **other networking activities** in a wide range of scientific topics.

ESR: less than 8 years between the date of the PhD/doctorate (or similar experience) and the date of involvement in the COST

- Funding Networking Activities: https://www.cost.eu/funding/what-do-we-fund/funding-network-ac/
- Action Networking Tools: https://www.cost.eu/cost-actions/cost-actions-networking-tools/
- How to Apply: https://www.cost.eu/funding/how-to-get-funding/how-to-apply/
- Browse (existing) Cost Actions: https://www.cost.eu/cost-actions/browse-actions/

ERASMUS plus

Usual EC Research Projects targeting/ involving R1/R2 Researchers

Erasmus+

EU programme for education, training, youth and sport

Home | About Erasmus+ | **Opportunities** | Programme Guide | Resources and tools | News

You are here: Erasmus+ / Opportunities / Individuals **https://erasmus-plus.ec.europa.eu/opportunities/opportunities-for-individuals**

Overview of opportunities under Erasmus+

Individuals

- Students
- Staff (teaching)
- Staff (training)
- VET learners
- Pupil mobility
- Adult learners

Opportunities for individuals

For nearly 30 years, the EU has funded the Erasmus programme, which has enabled over three million European students to spend part of their studies at another higher education institution or with an organisation in Europe.

Erasmus+ brings such opportunities to all - students, staff, trainees, teachers, volunteers and more. It's not just about Europe or Europeans either - with Erasmus+, people from all over the world can access opportunities.

Students

Studying abroad is a central part of Erasmus+ and has been shown to have a positive effect on later job

Truths and *Contextualisations*…! *HEU*… *Consortium/ Stakeholders*…!

- To achieve **European Added Value**…

- to achieve **Transnationality, replicability and transferability**…

HEU Projects need…

- Good **PARTNERS** and good **Consortium** of **Stakeholders**…!

Truths and *Contextualisations*…! *HEU*… *Consortium/ Stakeholders*…!

- Are they ***reliable*** and ***suitable*** for the purposes of the Project?
- Is their ***Organisation*** able to provide the ***necessary resources*** and ***attractive working conditions for Researchers*** in the Project?
- Do they contribute to ***Gender Equality***, to ***Open Science***, to ***Responsible R&I***, to any other ***Cross-Cutting Priority*** pertinent-to-the-Project?
- Do they have ***well-defined contribution-Role*** in the Project?

Truths and *Contextualisations*…!
HEU… *Consortium/ Stakeholders*…!

- ✓ **Experienced coordinator**
- ✓ Scientists with **track record**
- ✓ Relevant **expertise** & **skills**
- ✓ Good **infrastructure and resources**

- ✓ Involvement of **competent staff**

- ✓ Partners contributing to **"quintuple helix"** and **"*triple-i* dimension"**

- ✓ **Gender** Balance
- ✓ **Multidisciplinarity**
- ✓ **Complementarity** & **synergies**(no major Partner-overlaps)
- ✓ Relevant **stakeholders**

- ✓ Balanced **work-distribution**
- ✓ **Added value** of each partner
- ✓ Previous **collaborations**

Truths and *Contextualisations…!*

Scopes & Objectives… (of HEU-Projects)

S *Specific*

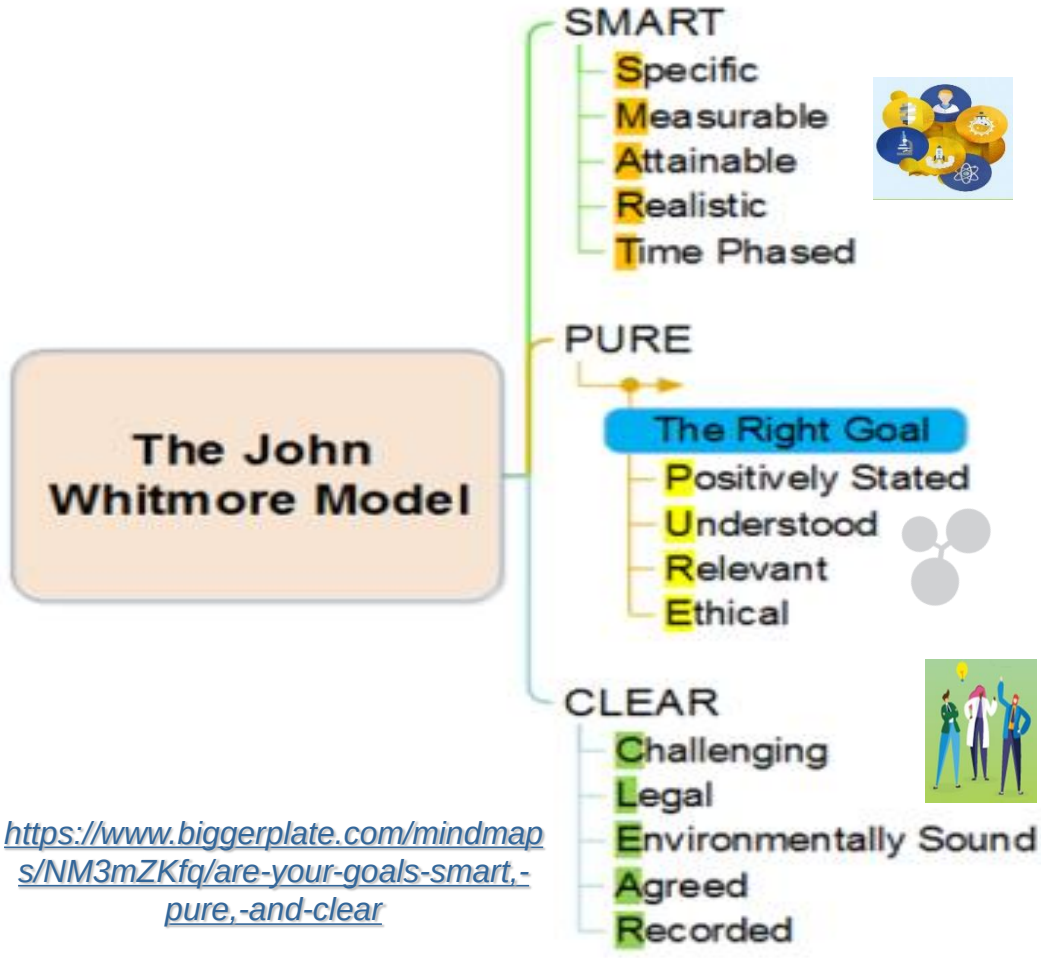
M *Measurable*

A *Attainable*

R *Realistic*

T *Timely*

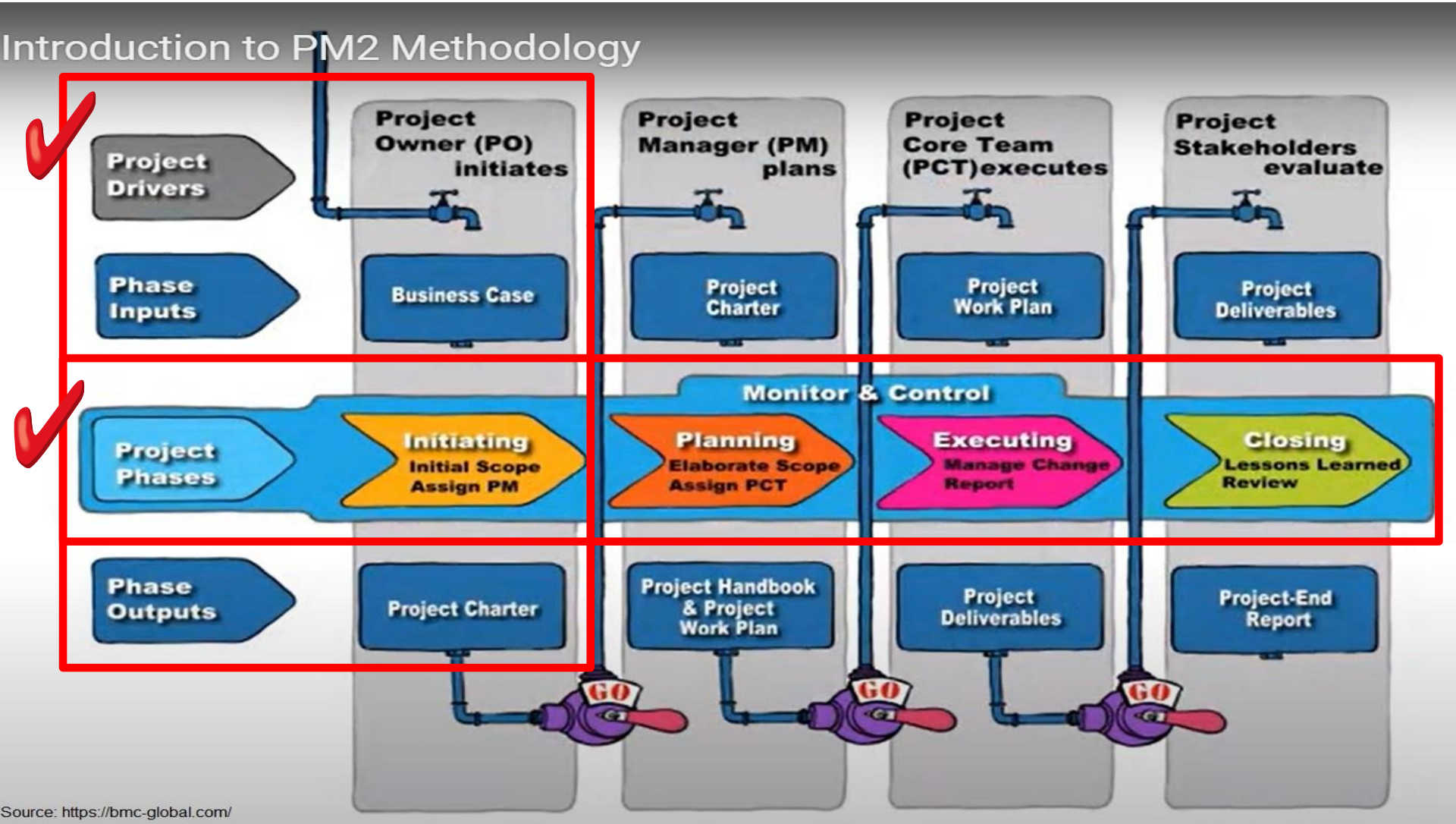
(Doran, G.T., 1981. Management Review)



https://www.biggerplate.com/mindmaps/NM3mZKfq/are-your-goals-smart,-pure,-and-clear

Truths and *Contextualisations…*

WHY we needed all the above Context…!



Source: https://bmc-global.com/

Presentation's **Programme**

10.00 - Opening

10.10 - 11.30 - Basics and Definitions in Research Project Management

11.30 - 12.00 - Coffee Break

12.00 - 13.00 - Specifics of Research Project Management Part I

13.00 - 14.00 - Lunch Break

14.00 - 15.00 - Specifics of Research Project Management Part II

Coffee 11:30 - 12:00

The… *"PMish"*… '*language*'… Terminology… and… Concepts…

What is a *project*?

"***A project is a temporary endeavor undertaken to create a unique product, service, or result***"

Project Management Institute

"***A complex, nonroutine, one-time effort limited by time, budget, resources, and performance specifications designed to meet customer needs***"

Gray & Larson

The… *"PMish"*… '*language*'… Terminology… and… Concepts…

What is a *project*?

- Major Characteristics of a Project:
  1. An established **objective**.
  2. A **defined life span** with a **beginning** and an **end**.
  3. Usually, the involvement of **several departments** and **professionals**.
  4. Typically, doing something that **has never been done before**.
  5. Specific **time**, **cost**, and **performance requirements**

The… *"PMish"*… '*language*'… Terminology… and… Concepts…

What is NOT a *project*?

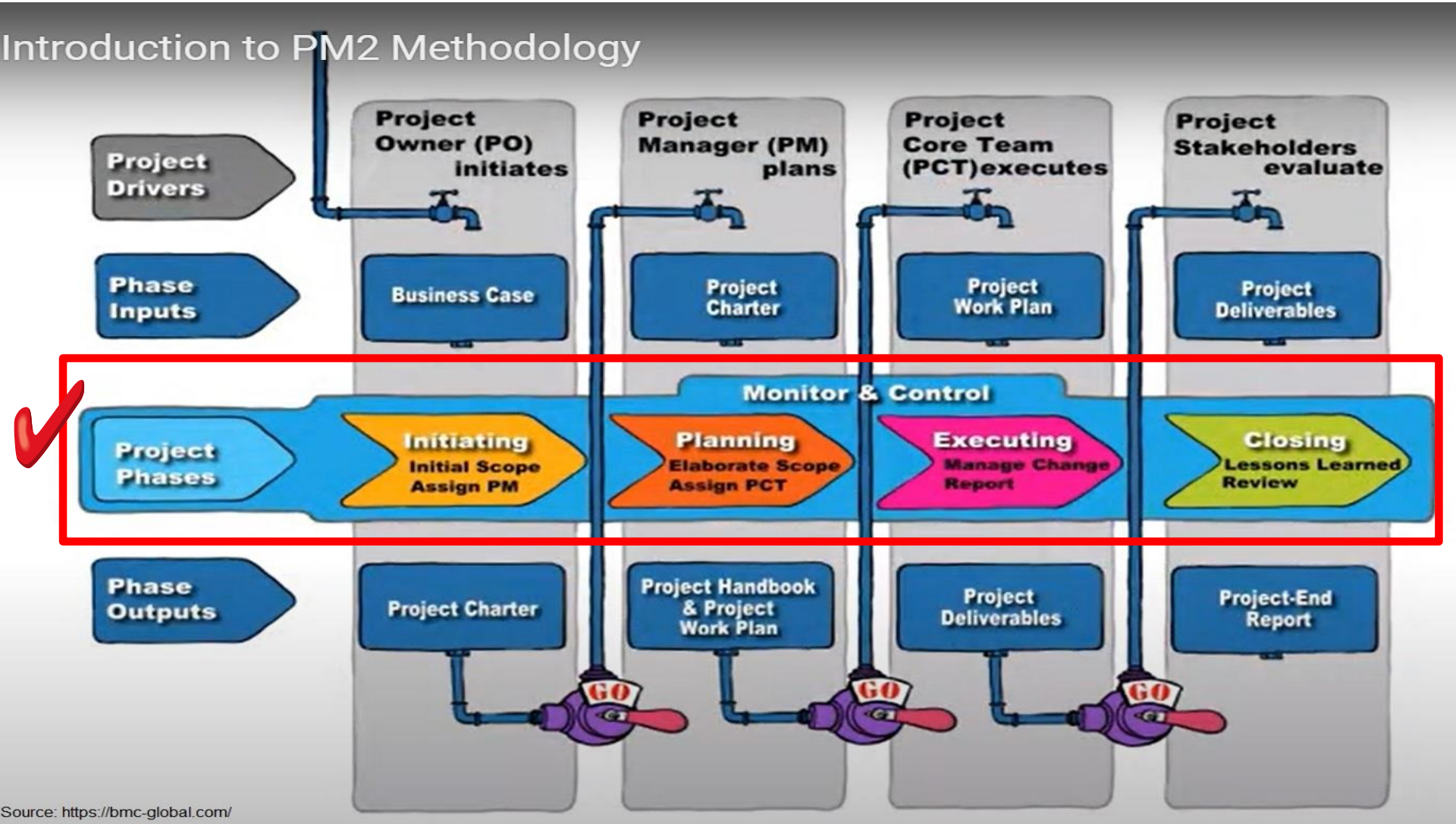
- Projects should not be confused with **everyday work**.
- A project is **not routine, repetitive work**!
- **Ordinary daily work** typically requires doing the **same** or **similar work over and over**, while a project is done **only once**;
- A **new product** or **service** exists when the project is **completed**

Source: From EUC – OSH625 Course

PM² PROJECT MANAGEMENT METHODOLOGY

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

PMI Project Management Institute GLOBALSTANDARD



Source: https://bmc-global.com/

The… *"PMish"*… '*language*'… Terminology… and… Concepts…

The Project Manager…!

- Performs the same functions as other managers (planning, scheduling, controlling and motivating), **BUT**:

"***they manage temporary, non-repetitive activities, to complete a fixed life project***"

- Creates a project team and organization from scratch.
- Decides what and how things should be done
- Meet the challenges of each phase of the project life cycle, and even oversee its dissolution

Source: From EUC – OSH625 Course

The… *"PMish"*… '*language*'… Terminology… and… Concepts…

The Project Manager… Personal Qualities… & Contradictions…!

- Systems thinker
- Personal integrity
- Proactive
- High emotional intelligence (EQ).
- General business perspective
- Effective time management
- Skillful politician
- Optimist

– Innovates but maintains stability.
– Sees the big picture while getting hands dirty.
– Encourages individuals but stresses on the team.
– Hands-off/Hands-on.
– Flexible but firm.
– Team versus organizational loyalties.

The… *"PMish"*… '*language*'… Terminology… and… Concepts…

The Project Manager… Challenges (and Role…)

- **Rarely** does everything go according to plan:
  - Project participants get testy; they fail to get along with each other; other departments are unable to fulfill their commitments; technical glitches arise; work takes longer than expected!
- The project manager's job is **to get the project back on track**:
  - A manager expedites certain activities; figures out ways to solve technical problems; serves as peacemaker when tensions rise; and makes appropriate trade-offs among time, cost, and scope of the project.

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

The Project Manager… Challenges (and Role…)

- **Project Management Maxims**:
  - **You can't do it all and get it all done**
    - Projects usually involve a **vast web of relationships**.
  - **Hands-on work is not the same as leading**
    - More pressure and more involvement **can reduce your effectiveness** as a leader.
  - **What's important to you likely isn't as important to someone else**
    - Different groups have different stakes (responsibilities, agendas, and priorities) in the outcome of a project.

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

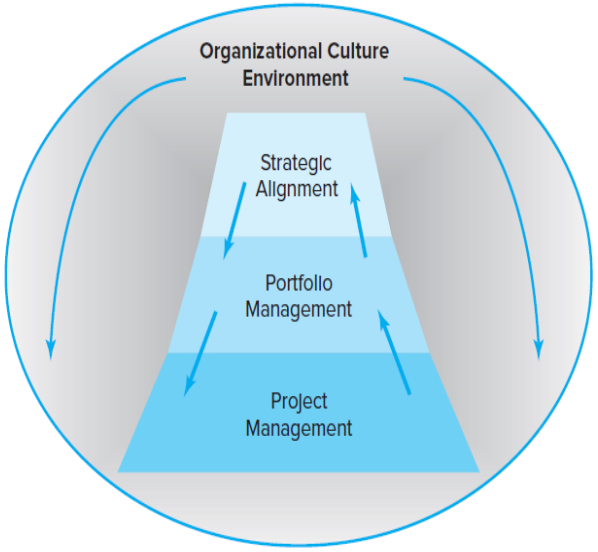
The Project Manager… Challenges (and Role…)

- Project managers are responsible for **integrating assigned resources** to complete the project according to plan.
- At the same time, they need to **initiate changes** in plans and schedules as persistent problems make plans unworkable.
- In other words, managers want to keep the project going **while** making necessary adjustments along the way.
- These two different activities represent the distinction between **management** and **leadership**. **Management** is about coping with **complexity**, while **leadership** is about **coping** with **change**.

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Project… Governance…! → Integrated Management

- Google, Apple, General Electric, and Sony **all have over 1,000 projects** being implemented concurrently **every day** of the year across borders and differing cultures!
  - *How do these organizations oversee the management of all these projects?*
  - *How were these projects selected?*
  - *How do they ensure performance measurement and accountability?*
  - *How can project management continually improve?*

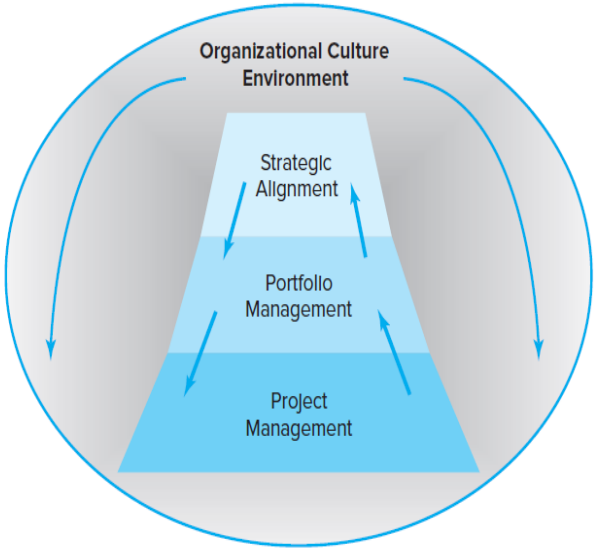


Source: From EUC – OSH625 Course
Source: Larson & Gray, Project Management. McGraw Hill Editions

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Integrated Management of Projects

- An overview of all project management activities;
- A big picture of how organizational resources are being used;
- An assessment of the risk their portfolio of projects represents;
- A rough metric for measuring the improvement of managing projects relative to others in the industry;
- Linkages of senior management with actual project execution management.

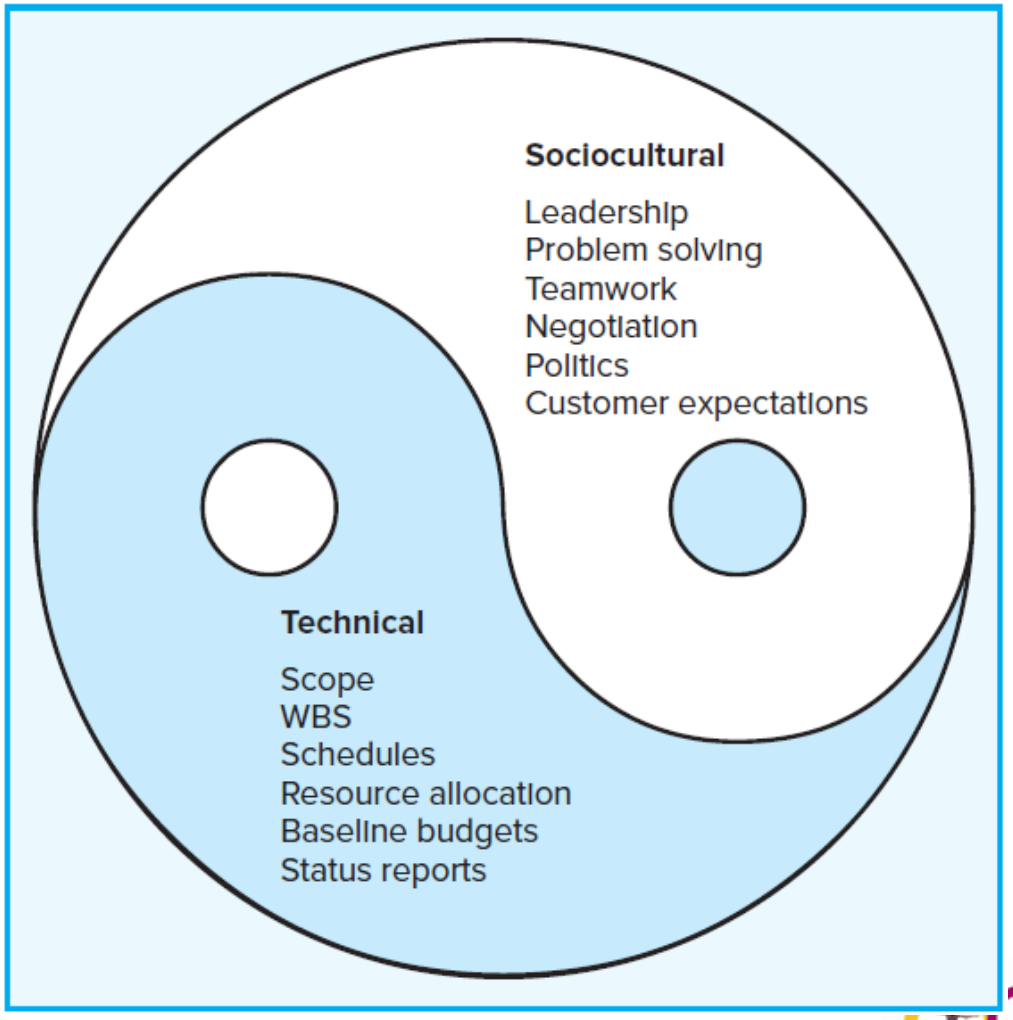


Source: From EUC – OSH625 Course
Source: Larson & Gray, Project Management. McGraw Hill Editions

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Integrated Management of Projects… with…

A Socio-Technical Systems Approach



Source: From EUC – OSH625 Course
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The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Projects Constraints and Priorities

FIGURE 4.1
Project Management Trade-offs

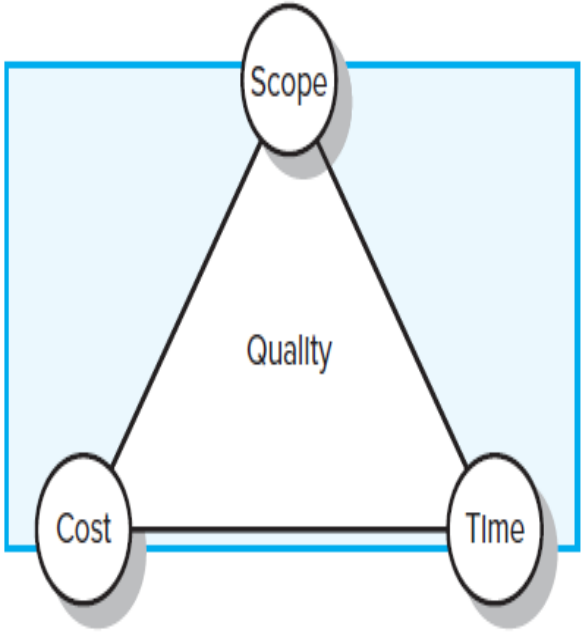
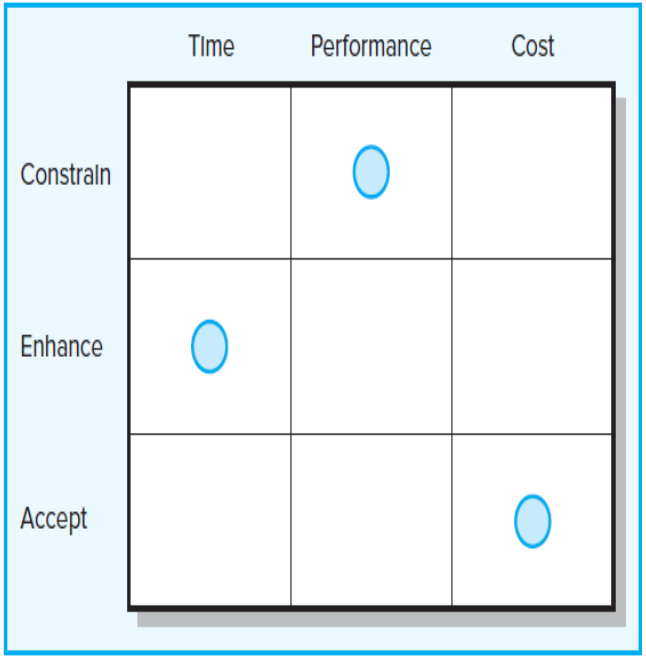


FIGURE 4.2
Project Priority Matrix



Source: From EUC – OSH625 Course
Source: Larson & Gray, Project Management. McGraw Hill Editions

PM² PROJECT MANAGEMENT METHODOLOGY

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

PMI Project Management Institute GLOBALSTANDARD

Define the Project Scope

- **Project scope** is the **definition** of the **end-result** or **mission** of your project—a product or service for your client/customer.
- The primary purpose is to **define** as clearly as possible the **deliverable(s)** for the end user and to **focus** the **project plans**.

"Checklist":

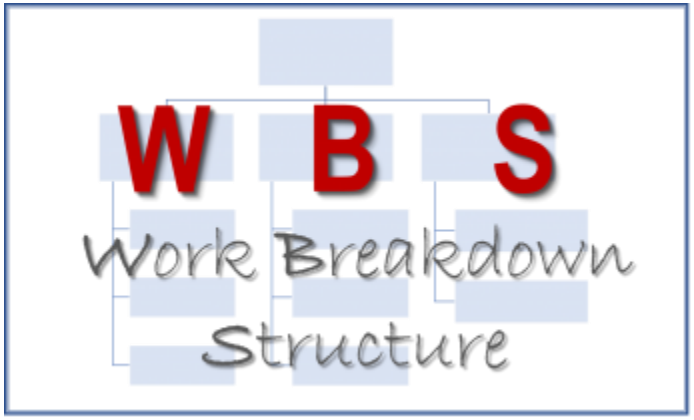
- **Project objective**
- **Deliverables**
- **Milestones**
- **Technical requirements**
- **Limits and exclusions**
- **Reviews with customer**

Source: From EUC – OSH625 Course

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Work Breakdown Structure

- Once the **scope** and **deliverables** have been **identified**, the work of the project can be **successively subdivided** into **smaller and smaller work elements**.
- The outcome of this **hierarchical process** is called the **Work Breakdown Structure (WBS)**

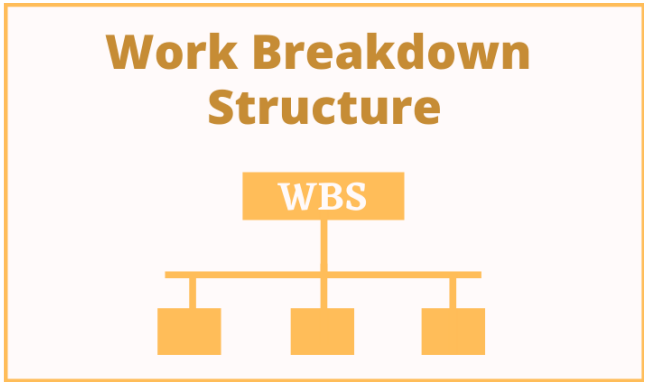


Source: From EUC – OSH625 Course

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Work Breakdown Structure

- All non-trivial projects utilize a **structured method** in order to:
  - selectively **collect information** to use through all phases of the project life cycle
  - **meet the needs** of all stakeholders (e.g., customer, project manager)
  - **measure performance** against the strategic plan of the organization
- The method is a **selective outline of the project**, and it is known as the **work breakdown structure**.



Source: From EUC – OSH625 Course

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Work Breakdown Structure… Why using one…!?!?

- Facilitates **evaluation** of cost, time, and technical performance of the organization on a project.
- Provides management with information appropriate to each organizational level.
- Helps in the development of the **organization breakdown structure (OBS)** which assigns project responsibilities to organizational units and individuals.
- Helps **manage** plan, schedule, and budget.
- Defines **communication channels** and assists in coordinating the various project elements.

Source: From EUC – OSH625 Course

The… *"PMish"*… *'language'*… Terminology… and… Concepts…

Work Breakdown Structure…

a PMI Hierarchical example

Level	Hierarchical breakdown	Description
1	Project	Complete project
2	Deliverable	Major deliverables
3	Subdeliverable	Supporting deliverables
4	Lowest subdeliverable	Lowest management responsibility level
5	Cost account*	Grouping of work packages for monitoring progress and responsibility
	Work package	Identifiable work activities

Source: From EUC – OSH625 Course

Source: Larson & Gray, Project Management. McGraw Hill Editions

!!!

In EU Projects: WP… Task… SubTask… Action…

Milestones & Deliverables

Presentation's **Programme**

10.00 - Opening

10.10 - 11.30 - Basics and Definitions in Research Project Management

11.30 - 12.00 - Coffee Break

12.00 - 13.00 - Specifics of Research Project Management Part I

13.00 - 14.00 - Lunch Break

14.00 - 15.00 - Specifics of Research Project Management Part II

Lunch 13:00 - 14:00

Real Examples

Evaluation Exercise

"Reviewer's Mindset" Simulation Exercise on:

Real Examples of the "Implementation" Criterion

Source: "Anonymized" Real Past Proposals

17Dec. 2021, Nicosia

Horizon Europe…
Usual Official Criteria

	Excellence	Impact	Implementation
Weighting and *Ex Aequo* Priority		**Check Calls!!!**	
"Content" 	•Clarity and pertinence of the **objectives**; •**Credibility** of the proposed approach. •Soundness of the **concept**; •Quality of the **proposed coordination and/or support measures**; •Progress **beyond the state-of-the-art**.	•The **expected impacts listed in the work programme** under the relevant topic; •Enhancing **innovation capacity** and integration **of new knowledge**; •Strengthening the **competitiveness and growth** of companies by developing and delivering innovations meeting the needs of European and global markets; •Effectiveness of the proposed **measures to exploit and disseminate the project results** (including management of IPR), to communicate the project, and to manage research data where relevant.	•Coherence and effectiveness of the **Work Plan**, including appropriateness of the allocation of tasks and resources; •**Complementarity of the participants** within the consortium (when relevant); •Appropriateness of the **management structures** and procedures, including **risk and innovation management**.  

Horizon Europe…
"Deciphered" Criteria

Excellence	Impact
Objectives and overview Research **methodology and approach**: highlight the type of research and innovation activities proposed Explain the **contribution that the project is expected to make** to advancements within the project field. Describe any **novel concepts,** approaches or methods that will be employed.	•Important field of research for Europe •**High practical value** of the project and also results can be applied to larger class of problems (tackling also **multidisciplinarity**) •Comparison of experience in relevant field outside Europe and showing that **project will promote European research and excellence and EU competitiveness** (also showing potential for new jobs creation) •**Dissemination, Exploitation and Outreach of the project results** IPR, Open Access, Scientific Community but also Wider Public.

Implementation

Work Packages description
Deliverables (= tangible output: report, document, technical diagram, software, etc.)
Milestones (=control/ decision points that help to chart progress)
Gantt Chart (=Table of Activities over planned time) and **PERT**-gram
•**Synergies of Partners**: each has clear contribution and role
Progress monitoring and management structure, including the **financial management** strategy
•**Risk management** for Risks that might endanger reaching the project's objectives and the **contingency plans** to be put in place should risk occur.

Reminding Scores

0 – Proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.

1 – Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.

2 – Fair. Proposal broadly addresses the criterion, but there are significant weaknesses.

3 – Good. Proposal addresses the criterion well, but a number of shortcomings are present.

4 – Very Good. Proposal addresses the criterion very well, but a small number of shortcomings are present.

5 – Excellent. Proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Source: EC / DG EAC – C.2 / REA – A.2

European Commission

17Dec. 2021, Nicosia

Real Examples
Individual-Researcher Projects

Implementation

A

Source: “Anonymized” Real Past Proposals

Real Examples
Individual-Researcher Projects

Strengths:

- *The work plan is presented in a clear and coherent way, through work packages and related tasks.*
- *An appropriate description of the deliverables and milestones is provided.*
- *The project design allows to work on several tasks at the same time, facilitating good progress and monitoring.*
- *The described work plan is highly effective and is very well supported by the Gantt chart.*
- *The overall allocation of tasks and resources is fully [illegible]tic towards the [illegible]hment of the project objectives.*
- *Follow-up meetings with the secondment team are [illegible]ed in the proje[illegible]plan.*
- *Major risks associated with the proposed resear[illegible] are [illegible]equately cons[illegible]red and [illegible]propriate contingency measures are proposed.*
- *The equipment and facilities offered by the hos[illegible]and se[illegible]ndment institution[illegible]nt and clearly appropriate for developing the project.*

Weaknesses:

- *Time required for the planned reporting activities is not fully con[illegible]ered in the proposal.*

4,9

Source: “Anonymized” Real Past Proposals

Real Examples
Individual-Researcher Projects

Implementation

B

Source: “Anonymized” Real Past Proposals

Real Examples
Individual-Researcher Projects

Strengths

- Deliverables and milestones are well formulated and will facilitate progress monitoring.
- The independence of WPs has potential to facilitate rapid progress of the project.
- Resources for technical parts have been realistically allocated.
- Management plan is properly explained and it includes a clear description of overall responsibility for the activities
- Proposal includes adequate project design and setting activities at the beginning of the project.
- The contribution of he host institution to the research activities is clearly explained.
- The equipment and facilities available at the h[illegible]econdment institutions [illegible]learly appropriate to develop this project, especially regarding the availability of UAV expertise, which is wo[illegible]class..

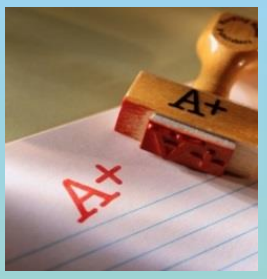
Weaknesses

-There is no clear work package or task planned for the s[illegible]tific exploitation of [illegible] results, leaving some of the scientific objectives of the proposal unaddressed.
- Number of person months specified for all the [illegible]ges are[illegible]t fully ju[illegible]ied according the duration of the project. Allocated time to several actions is not convincingly described.
- Number of months allocated for school visits is unconvincingly presented.
- Contingency measures for potential risks associated with the instrumentation and techniques used are not clearly identified. Specifically, one unaddressed risk is that there will be no appropriate vehicle to carry up the load and/or the sensors are not light enough.
- Support services available to the researcher for help with practicalities and day to day management of the projects are not adequately described in the proposal.

3,7

Source: “Anonymized” Real Past Proposals

Real Examples
Collaborative Projects



Implementation

X

Source: “Anonymized” Real Past Proposals

Real Examples
Collaborative Projects

The work plan is coherent and efficient, and tasks and resources are very well allocated and distributed. The work plan is highly appropriate to fulfil the objectives of the proposal and reach the expected results. The Gantt chart provides a very clear overview and enables a good understanding of the project approach. The description of the tasks within the Work Packages is very clear and detailed. The deliverables cover the proposed work very well, and the milestones are very appropriate to monitor the progress of the project.

Overall the work plan is very coherent but tasks assigned under Project Management are only briefly explained.
The management structure and procedures are of good quality and are suitably presented. Management responsibilities are clearly described.

4,5

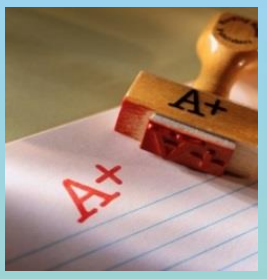
A risk management plan is expected and indicative risks are mentioned together with adequate mitigation measures. However, the proposal does not comprehensively analyse the risks.

Innovation management is adequately addressed.
There is complementarity and relevance in the selection of partners, which is portrayed in detail. The contribution of each partner is clear.

The proposal describes a strong consortium with clear distinct and complementary roles and expertise. The partners in the consortium have collaborated in previous projects. Some members of the consortium have very strong experience in European programmes and in internationally leading research,

The staff allocations and other direct costs are satisfactorily summarised. The costs per partner are clearly outlined.

Real Examples Collaborative Projects



Implementation

Y

Source: “Anonymized” Real Past Proposals

Real Examples
Collaborative Projects

The work plan is not well structured, and fails to sufficiently explain why most tasks run in parallel. It is also not shown to be sufficiently flexible to cope with any setbacks. Various shortcomings are seen in the description of tasks. For example, despite the fact that one work package already covers all management issues of the project, a new office for conference and events is foreseen in one task, which is not sufficiently justified in the proposal text. There is also a lack of sufficiently clear and convincing justification for the 30 person-months allocated for WP 'Management and Coordination'. Furthermore, the planning (duration and programme) of the summer school lacks detail. The difference between exchange visits and secondments is not made sufficiently clear. In addition, although a clear description is provided of the data management, the proposal fails to clearly include this item in the deliverables.

The management structure and procedures are appropriate and are consistent with the scope of the project. Risk and innovation management are well addressed, including a detailed breakdown of the risks at the level of management, training and networking, as well as indicating how to mitigate them.

3

The proposal convincingly demonstrates the extent to which the consortium as a whole provides the required expertise. The project will bring together excellent organisations to ensure the transfer of know-how to the coordinating institution, and these organisations demonstrate complementary competences and expertise.

The allocation of tasks between the participants is appropriate and their respective roles are justified. Also, the overall distribution of resources per task is consistent with the content of these tasks. However, the personnel costs indicated for Partner 4 are unclear and not sufficiently justified.

Source: "Anonymized" Real Past Proposals

“Hints”… “Tips”…

→Overall Useful Links and Documents…!

- **SEDIA**

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

- **Helpdesk and Support Services**

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/helpdesks

- **On-line Manual**

https://webgate.ec.europa.eu/funding-tenders-opportunities/display/OM/Online+Manual

- **Annotated Model Grant Agreement**

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga_en.pdf

→ **For the “UNIT Grants”:**

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/agr-contr/unit-mga_he_en.pdf

- **EURAXESS (Charter-&-Code, Policy…)**

https://euraxess.ec.europa.eu/

https://euraxess.ec.europa.eu/useful-information/policy-library

“Hints”… and “Tips”… Some Useful ‘educative’ **video**-presentations / **webinars**

- PM2 Alliance. Core Elements of the PM^2 Methodology: https://www.youtube.com/watch?v=4Dar14oe-0g
- Capgemini. OpenPM² - Intro to Europe’s project management methodology: https://www.youtube.com/watch?v=0-_58YDWerc
- European Commission. Project Management - Monitoring & Evaluation: https://www.youtube.com/watch?v=Pwd7ddSDgZQ
- Simplilearn. Project Management Full Course (8 Hrs): https://www.youtube.com/watch?v=uWPIsaYpY7U
- Deniz Sasal. Project Management Simplified: Learn The Fundamentals of PMI's Framework: https://www.youtube.com/watch?v=ZKOL-rZ79gs
- Ricardo Vargas. PMBOK® Guide 6th Ed Processes Explained: https://www.youtube.com/watch?v=GC7pN8Mjot8
- Project Management Institute Learning: https://www.pmi.org/learning
- ProjectManager.com. Top 10 Project Time Management Tips Of All Time: https://www.youtube.com/watch?v=pVYlOUxReII
- ProjectManager.com. Top 10 Terms Project Managers Use: https://www.youtube.com/watch?v=7c8xP1gRIWs
- PMC Lounge. Project Management 101 Training | Introduction to Project Management | Project Management Basics: https://www.youtube.com/watch?v=HDXkITHLZSI
- Psoda. 12 Terms You Should Know | Project Management Fundamentals: https://www.youtube.com/watch?v=qTQsdJFG4SQ
- PMI Constraints: https://www.pmi.org/learning/library/triple-constraint-erroneous-useless-value-8024

Some Overall **“Hints”…** and **“Tips”**…

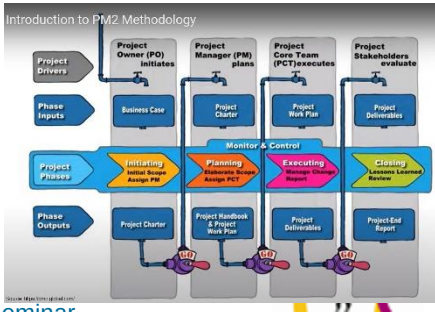
Good to follow the “WBS” approach:

- WHY a project is carried out (Vision – Mission – Charter)
- WHAT it is expected to achieve (and what not…)

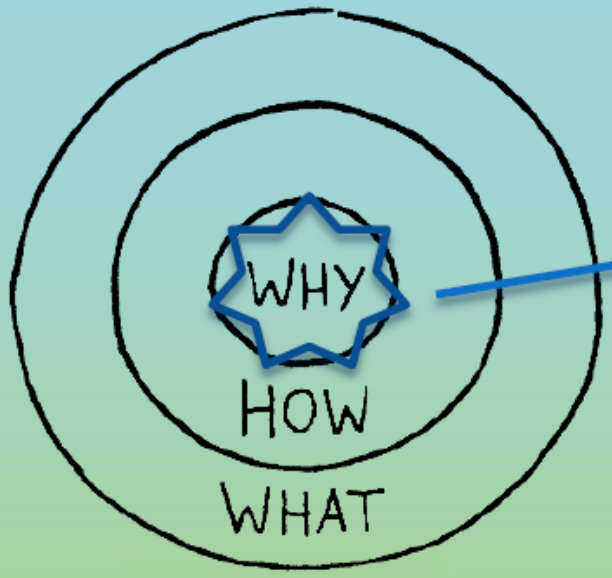
  →So, Project Scope & Objectives (and non-Objectives)
- WHO is going to do the work…

  →So, Project Core Team, Consortium, synergies and complementarity of Partners/ Stakeholders/ Users
- HOW the project is going to achieve the above…

  →So, Work-Plan and Phases of Work, as well as Means/ Resources to be utilized.



The Golden Circle



Our Credo

Inspire…

Motivate…

Empower…

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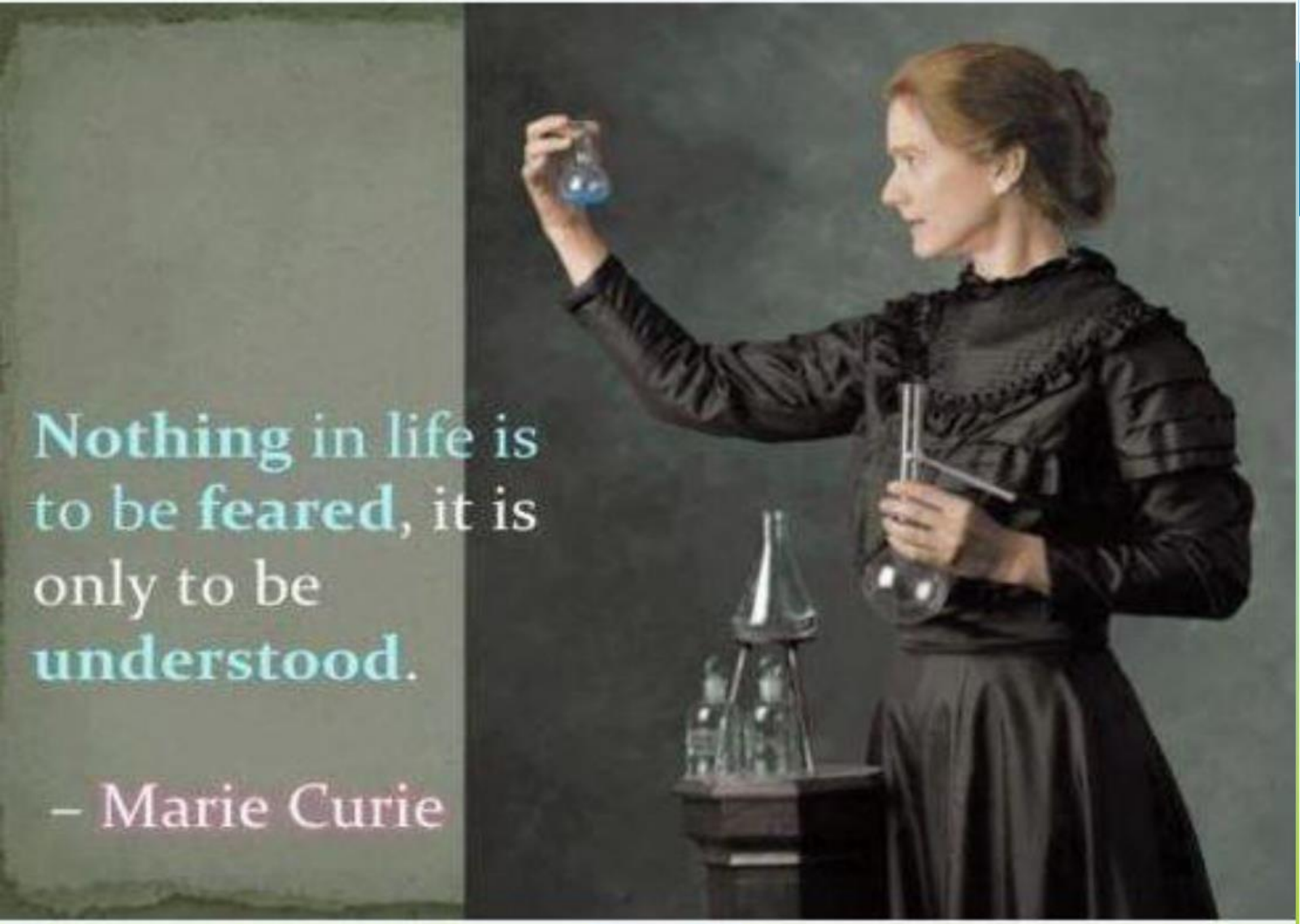
…We believe in a holistic and inspirational offer to the academic and business world. CERIDES is based on the offering of educational, research, and consulting solutions…


Nothing in life is to be feared, it is only to be understood.
– Marie Curie

Contact... Details..!

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PM² Methodology

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