



THE LITTLE GUIDEBOOK ON FP7

A practical method for preparing your project and formalizing your FP7 application in the framework of the Seventh Framework Programme

20 pages of operational advice



Eurofunding is a publication of Welcomeurope

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Information to take the best decisions

- * For political and strategic ends: position your organisation, influence the direction of the policies
- * For operational purposes: obtain funds, realise European projects

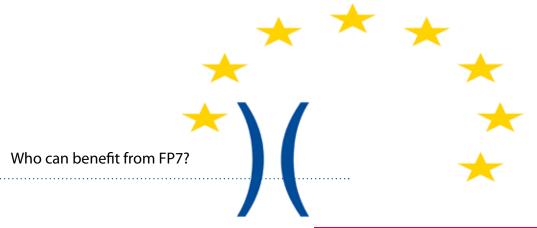
Contact Gwenaëlle Radosevic: gradosevic@welcomeurope.com



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2	Define the approach of your project as to meet the European Commission expectations
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You are:

- a research center
- a university
- a corporation or a SME
- a public administration
- an agency or a chamber
- an association
- an individual researcher
- ... situated in an eligible country

Get Funding for 50% to 100% of your research expenses!

Are you involved in research activities or do you wish to outsource your research?

Then FP7 may be interesting for you!

The FP7 Welcomeurope Guidebook will help you:

- to develop the methodology required to prepare your research project
- to be able to identify funding opportunities for your project
- to optimize your application and maximize your chances of being selected



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Step 1 – Prepare

your project

1 What is 7th Framework Programme for Research and Technological Development?

2 Define the approach of your project as to meet the European Commission expectations

3 Understand how FP7 programmes work in practice

4 The FP7 participation rules

5 Identifying the relevant programme matching your activities

Step 1 – Prepare your project

Chapter 1- What is 7th Framework Programme for Research and Technological Development?

- 1- FP7 Main Objectives
- 2- Structure of the programme
- 3- Funding schemes

The 7th Framework Programme for Research and Technology Development (FP7) was adopted for a period going from January 1st, 2007 till December 31st, 2010. It is a successor of FP6 (2002-2006) and it is endowed with a total of 50 521 billion euro budget. It is the most important EU Community Action Programmes.

1- FP7 Main Objectives

From a strategic point of view, research is a high priority for the European Community. The Lisbon Treaty (March 23rd and 24th, 2000) had fixed the EU objective "to become the most competitive and dynamic knowledge economy, capable of sustainable economic growth accompanied by qualitative and quantitative improvement in employment and social cohesion."

The realization of this strategic objective passes by the intensification of the three pillars of the European "knowledge triangle": education, research and innovation.

According to the Barcelona European Council (March 15th and 16th, 2002) the total budget dedicated to research, development and innovation had to reach 3% of the EU GDP before 2010.

These general and political objectives, which aim at making the European Union the main research area in the world, steered the programming of FP7.

It is very important to always refer to this notion of "European Research Area» in your applications.



Is your project eligible for FP7? Do not hesitate to subject it to the Welcomeurope team for a preliminary diagnosis on the European potential of your project.

Ask for our 2010 booklet. Contact: contact@welcomeurope.com



Step 1 – Prepare your project

1 What is 7th
Framework
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2- FP7 structure

The 7th Framework Programme is structured according to four main programmes:

- COOPERATION: supports collaborative research projects led by transnational research teams, in ten key thematic areas:
- 1) Health
- 2) Food, agriculture and fisheries, and biotechnology
- 3) Information and communication technologies
- 4) Nanosciences, nanotechnologies, materials and new production
- 5) Energy
- 6) Environment (including climate change)
- 7) Transport (including aeronautics)
- 8) Socio-economic sciences and the humanities
- 9) Space
- 10) Security

For each of these themes, the financed actions will take one of the following forms:

- Collaborative research projects
- Joint technological initiatives
- Coordination of the non-European research programmes
- International cooperation actions
- IDEAS: supports research work undertaken by the researchers' own initiative and led in all types of areas by different national or transnational teams, who are in competition at the European level.

The implementation of the IDEAS programme has been confided to the European Research Council. The available grants are available as fellowships for young researchers and fellowships for experimented researchers.





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5 Identifying the relevant programme matching your activities - PEOPLE: strengthens, quantitatively and qualitatively, the human potential in Europe, in areas like research and technological development and supports the mobility and careers of researchers.

This programme assures the continuity of the Marie Curie actions, developed under the FP6.

The implementation of the PEOPLE programme is made through five thematic subactions:

- Initial training of researchers in academic networks
- Life-long training and career development
- Industry-academia partnerships
- International dimension
- Specific actions



- CAPACITIES: supports the essential aspects of the European research and innovation capacities.

The seven main fields of action of the programme are:

- Research infrastructures
- Research for the benefit of SMEs
- Regions of Knowledge and the support of regional groups of researchers
- The convergence regions' research potential
- Science in Society
- Support for the coherent development of the research policies
- International cooperation



The FP7 programme also aims at supporting the scientific and technical, direct and non-nuclear actions, led by the Joint Research Centre (JRC) with the following budgets:

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Cooperation Ideas Capacities 10 thematic priorities 7 fields of action Fundamental research 1 • Health 1 • Research infrastructures 2. Food, agriculture and People biotechnology Marie Curie actions 3. Regions of knowledge · Training and Career of researchers 4. Research potential 4. Nanosciences, nanotechnologies, 5. Science and society materials and new production technologies 6. International cooperation 5. Energy . Joint Research Centre (JRC) and 7. Development of research policies 6. Environment (incl. climate change) Euratom 7 • Transport (incl. aeronautics) Socio-econ, Sciences and 8 • the humanities 9. Space 10 • Security

Health

3 Fields of activities

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ILLUSTRATION



> Biotechnology, generic tools and medical technologies

> Translational research for human health

> Optimise health care service deliveries



3- Funding schemes

The 7th Framework Project supports research projects by means of various types of projects also called "funding schemes":

- Collaborative research projects
- Networks of excellence
- Coordination and support actions
- Support to explorative research
- Support for training and career development of researchers
- Joint technology initiatives
- Development of new infrastructures of European interest

E.g. Eurofunding programme sheet

FP7 - CAPACITIES Economy - Finances Environment Administrations, States Agenoles, Chambers Corporations Federations, Unions International Organisation 2007-2013 Industry Innovation Local development New technologies Recearch centres SMEs SME Pollo Universities Specific programme for projects that enhance research and innovation capacities and support the coherent development of research politics. Budget Line: 02, 08, 08, 08, 10, 11 ACTIONS REGIONS Applied recearch Balkane Creation of companies Candidate countries Exchange of know-how Fundamental research Worldwide Mobility actions Teaching, Training Transnational coop Global budget: 4.097 billion euro Overview of the themes covered by FP7 specific programme "CAPACITIES" (see detailed EUROFUNDING sheets for each sub-programme under Capacities). Optimising the use and development of research infrastructures
Optimising the use and development of research infrastructures
Strengthening innovative capacities of SMEs and their ability to benefit from research
Supporting the development of regional research-driven clusters
Unlocking the research potential in the EU's convergence and outermost regions
Bringing science and society closer together for the harmonious integration of science and technology in European society
Horizontal actions and measures in support of international cooperation THEMES AND FINANCED ACTIONS: 1 Research Infrastructures - 1,850 billion €: Optimising the utilisation of existing research infrastructures and improving their performance Foster the development of new research infrastructures Support measures to emerging needs Research for the benefit of small and medium sized enterprises (SMEs) - 1,366 billion € 2 Research for the benefit of small and medium sized enterprises (SMEs) - 1,366 billion €
3 Regions of knowledge - 126 million €
* Analysis, development and implementation of research agendas
* "Mentoring" of regions with a less developed research profile by highly developed ones
* initiatives to improve integration of research actors and institutions in regional economies
4 Research potential - 370 million €:
* Exchange know-how and experience through trans-national two-way secondments of research staff between the selected centres in the qualifying regions
5 Science in society - 280 million €:
* Encourage a societal dialogue on research policy
6 Support to the coherent development of research policies - 70 millions €
7 Horizontal activities of international cooperation - 165 million €
* Coherent development of research policies * Coherent development of research policies More detailed information on the specific EUROFUNDING sheets. Associated countries to FP7, beyond the EU are: Candidate countries (Croatia, Macedonia, Turkey), EFTA members (Norway, iceland, Switzerland, Liechtenstein) and Albania, Serbia, Montenegro and Israel. WEB: cordis.europa.eu/fp7/capacities/home_en.html FUNDING OF THE PROJECTS activities or dissemination.
Selection process: Every research area publishes one or two calls a year. (see detailed EUROFUNDING sheets).
Selections and receive all calls in your mailbox.
To be known: The instruments known under FP5 are maintained in FP7, as well as the various funding rates for each resEUROFUNDING sheet "FP7 - FUNDING SCHEMES"). European Commission DG Research, Unit A1 Rue de la Loi, 200 8-1049 Bruxelles Tel : Emall :fp7@cordis.lu

Step 1 – Prepare your project

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Chapter 2- Define the approach of your project as to meet the European Commission expectations

1- Prior analysis of the needs and research strategy

Deciding to conceive a European project: What is your development or business strategy to participate to FP7?

Check the thematic priorities.

Check the funding schemes.

The top-down and bottom-up approaches.

2- The Project sheet

The project sheet is built on the basis of one to three A4 page document and has to be used to answer the first essential questions.

- 1. What is the main objective of the project proposal?
- 2. What will be different? How is your idea innovative?
- 3. What problem does it solve?
- 4. How? (methods, steps to follow, necessary means
- 5. Why can't other actors be expected to carry out the work?
- 6. Who will manage the idea?
- 7. What partners for which skills?
- 8. How will you measure your progress?
- 9. What will be the funding scheme and why?

3- Meeting the Commission's expectations

Make an search for state of the art; place your idea in the context of European research.

What is the European Added Value of your project?



Is your project eligible for FP7? Do not hesitate to subject it to the Welcomeurope team for a preliminary diagnosis on the European potential of your project.

Ask for our 2010 booklet. Contact: contact@welcomeurope.com



Chapter 3- Understand how FP7 programmes work in practice*

Preparing a grant request requires a minimum of knowledge about the logic of the framework programme.

1. Example of a Eurodfunding programme sheet

Example of a complete Eurofunding programme sheet including: The legal base, geographic coverage, eligible organisations, partnership criteria and information about the forthcoming calls for proposals.

Step 1 – Prepare your project

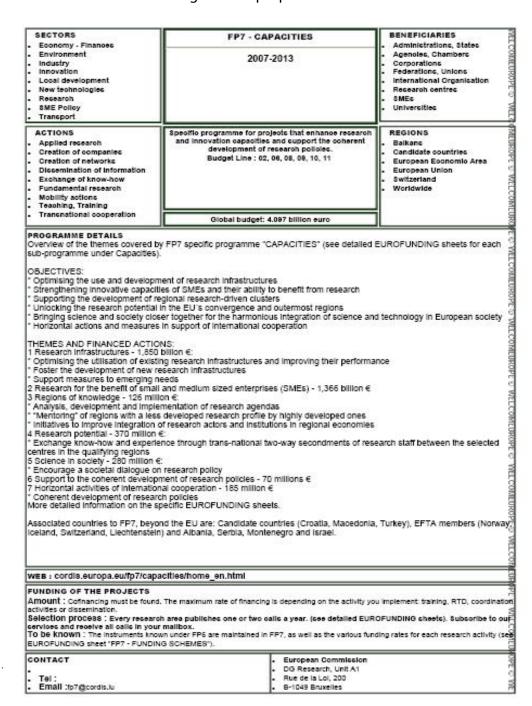
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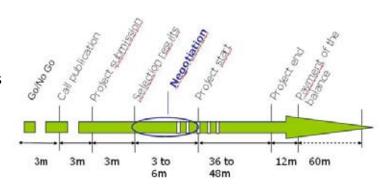
5 Identifying the relevant programme matching your activities





2. The life cycle of a FP7 Project

- Gathering information
- Publication of the call for proposals
- **Project submission**
- Evaluation and selection of candi dates
- Negotiation
- Starting the contract, implementa tion of the project
- **End of contract**
- Balance of the accounts



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EU Programme	New Find a partner, click here	(
Title of the call	FP7 - Establishment of a database of prospective independent experts assist the Commission's services	s to
Programme(s)	 FP7 - EU FRAMEWORK PROGRAMME FOR RESEARCH, TECHNOLOGICAL DEVELOPMENT AND DEMONSTRATION ACTIVITIE GMES (GLOBAL MONITORING FOR ENVIRONMENT AND SECURITY 	
Reference of the call	OJEU C 305 of 14.12.2006	
Global budget	not communicated	
Amount awarded per project	not communicated	
Closing Date(s)	July 31st, 2013	
	Are you eligible ?	
Summary	2 calls addressed to individuals and organisations for the establishme of a database of prospective independent experts to assist the Commission's services for tasks in connection with the Seventh RTI Framework Programme	
Domains concerned	Research	
Who can apply ?	Agencies, Chambers - Associations - Federations, Unions - Researc centres - Universities	h
Regions	EU Member States, Candidates Countries, European Economic Area	à
	Details on the financed actions	

Assist in the evaluation of proposals in line with the various scientific, technological and socioeconomic aims of the Seventh Framework Programme. Evaluation work includes making recommendations on ways to gear research towards optimum achievement of the aims of the specific programme concerned

- Assist in the monitoring of projects selected and funded by the Community, including, where necessary and as appropriate, the monitoring of projects funded by the Community under previous RTD framework programmes

Contribute to other purposes where specific expertise might be required (e.g. monitoring of the implementation, evaluation and assessment of impacts of RTD programmes and policies)

- Scientific, professional, industrial, general research institutions and/ or learned societies and other organisations with an active interest in the performance of RTD

Have skills and knowledge appropriate to the <u>areas</u> of activities in which they might be asked

Have a high level of professional experience in the public or private sector in one or more of the following <u>areas</u> of activity:

— research in the relevant scientific and technological fields

 administration, management or evaluation of RTD projects, programmes or policies
 use of the results of RTD projects, technology transfer, innovation, and business cooperation, particularly with regard to SMEs

3. The selection procedure

The FP7 project selection is made on the basis of calls for proposals.

Welcomeurope call for proposals example:

We have listed for you all the FP7 Calls: win precious time and don't miss any opportunity!

Every week, you receive email alerts accor-

to your research profile with:

- The deadlines to submit your projects
- The details of the financed priorities and our advices about it
- The useful documents (call text, guidelines, etc.)



Step 1 – Prepare

your project

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Chapter 4- The FP7 participation rules

1. The partnership

Definition and characteristics

"Partnership" or « transnational network" means the organisation mode that governs the functioning of the European Community Action projects, such as FP7.

2. The partners

Minima

The minimum of three participants doesn't reflect the reality of the final selected consortia.

The beneficiaries

According to the grant agreement, all the participating organizations are considered beneficiaries or contractors and they all have the same rights and duties. The partnership is governed by joint technical responsibility.

The Coordinator

This term is used to qualify the organization which formulates the funding request and which will be brought to sign the grant agreement with the donor if the project is retained.

The partner

A partner is a body actively taking part in the project's actions (from its conception to its realization).

Other actors in the project

The subcontractor

The project leader or one of the partners charges the subcontractor with a part in the realization of the project on the basis of a paid service (in accordance to the market price).

The Scientific Committee

In order to establish a monitoring system and an adequate evaluation of the project, a partnership project predominantly scientific or technical, can rely on the opinions of a scientific committee composed of outside experts who will evaluate the progress and the success of its objectives.

Non-EU participants

If non-EU participation is perceived as constructive and positive by most participants, the inclusion of Indian and Chinese partners, sometimes encouraged by the work programmes, can encounter reluctance when building the formal consortium or in the negotiation phase.



Chapter 5- Identifying the relevant programme matching your activities

1. Choosing between FP7 and other research and innovation funding programmes

You have a project in the field of research and development or innovation? If FP7 is the main programme on the subject, remember that the programme includes 25 programmes with a different purpose.

More funding programmes exist that contribute to the creation of a European knowledge society, which sometimes can be more appropriate, including:

- The European Regional Development Fund (ERDF) managed by EU member states and which offers grants for innovating projects particularly for SMEs
- The Competitiveness and Innovation Framework Programme which consists of three different thematic programmes:
- Entrepreneurship and Innovation Programme (EIP)
- The Information Communication Technologies Policy Support Programme (ICT-PSP)
- The Intelligent Energy Europe Programme (IEE)

In addition, funding opportunities may also exist at the European level outside the European Community framework, such as EUREKA, which aims at strengthening industrial cooperation between SMEs, research centres and universities in order to enhance industrial innovation.

Also, EUROSTARS or COST programmes that support the creation of high tech partnerships or scientific research partnerships.

Explore our European programmes search engine!

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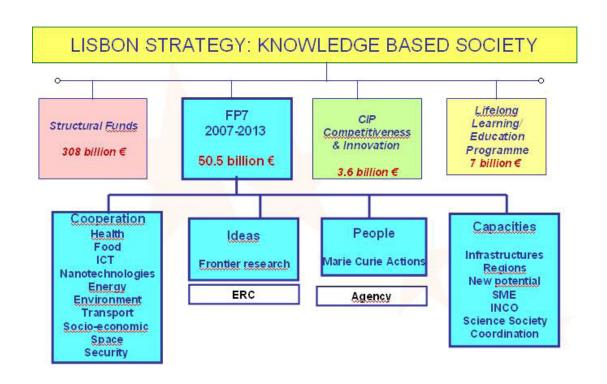




2. Choosing the right programme within FP7

Among the different specific FP7 programmes (Cooperation, Ideas, People, Capacities), we must distinguish several thematic sub-programmes.

For each of these, Welcomeurope has developed a fact sheet that you can find in the Eurofunding Guide.



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3. Eligibility

Before identifying the right programme, one must first ascertain the eligibility of its entire project, and write an ad hoc draft in accordance with the programme's constraints.



Step II – Building your partnership

Chapter 6 - The keys to formalize a successful consortium

A set of operational recommendations to create a balanced and effective partnership.

1. Positioning: Coordinator or partner?

A question of strategy A question of capacity

2. The organization and the management

Within the consortium, the coordinator plays a key role. It represents the consortium in its exchanges with the European Commission's services. It is responsible for submitting all documents (technical and financial reports). It receives the entire European grant and will have to redistribute it to the partners.

It must also ensure proper and effective communication between the partners. He doesn't enjoy more rights than the other participants, but rather more obligations relating to the financial monitoring and reporting

The Commission doesn't impose its will as to the organization of the consortium. The partners are free to organize as they see fit.

But whatever the chosen solution, the participants are jointly reliable for the project's implementation.

Step II – Building your partnership

6 The keys to formalize a successful consortium

7 Identifying the partners

8 Building a consortium using the right tools



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Chapter 7- Identifying the partners

1. Identifying the partners

The database of R&D Partners

This database is available on the CORDIS website (the portal of research and development in Europe)

This database allows you to publish your profile as a partner and see the offers or requests for partnership.

Many research criteria are available, including the sub-programme, the type of required cooperation, or the geographic location of partners.

The national contact points (NCP)

The NCPs network for FP7 has been established to provide advice and personalized support to users in all Member States and associated countries.

Getting in contact with NCPs from other countries may be a good way to find partners for your projects.

European networks active in research and innovation

Representative communities offices and private companies representations at the European Union



Discover now our work space dedicated to the European project manager, developed in partnership with an IT company.

For more information

contact us at 33 1 42 54 60 64



Step II – Building your partnership

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Chapter 8 Building a consortium using the right tools

1. The formalization of the partnership with a consortium agreement

The consortium agreement is a mandatory and essential document for collaborative projects. It is intended to govern the relations between the contractor and each partner, including setting the rules of project management, shared responsibilities, financial covenants, and rules relating to the exploitation and dissemination of results (intellectual property rights).

2. The issue of intellectual property rights

The European Community definition

The foreground and background



Training: How to Build a European partnership? A tspecific toolkit and the implementation of a methodology to manage a European partnership are essential.

For more information contact us at 33 1 42 54 60 64



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Step III -Formalizing your appli-

9 Reference documents

cation

10 Planning: Organize the writing of the application

11 Structure the project and plan your project management

12 Design the project budget

Step III - Formalizing your application

Chapter 9- Reference documents

1. Documents related to the call for proposals

The annual work programme

Each year, a work programme is adopted for each of the FP7 thematic programmes, including their priorities for the current year and providing guidance on specific topics to be taken into account in one of the research areas of the call for proposals.

It is essential to obtain the content of these work programmes before their official publication.

The FP7 Guide to Financial issues

The Financial Regulation informs about the management and decision-making procedures, as well as the rules related to the execution of the European Union budget. This FP7 guide completes the overall financial regulation for specific FP7 questions. It is a reference document for all programme funding.

2. The invitation to submit proposals

Calls for proposals (call fiche)

The publication of a call for proposals is the official announcement of the opening of the procedure for awarding grants. It indicates the priorities of the European Commission.

Calls list the following information: eligible organizations, the deadline for applications, project priorities, duration of projects to be funded, a reminder of the programme's objectives, contact information to the Commission, links to all relevant documents (form, budget schedule, general conditions of the program ...).

The FP7 calls are open by programme and thematic activities.



Note: FP7 calls for proposals are available only in English.

The guidelines for applicants or stream lines (Guide for Applicants)

Call Title: Call for proposals for ERC Advanced Investigators Grant

Call identifier: ERC-2010-AdG

Date of publication1: 29 October 2009

Electronic proposal submission deadlines2 (single submission of full proposal): 3

Panels: PE1 - PE10 (Physical Sciences & Engineering), 24 February 2010, 17.00.00 (Brussels local

Panels: LS1 - LS9 (Life Sciences), 17 March 2010, 17.00.00 (Brussels local time)

Panels: SH1 - SH6 (Social Sciences & Humanities), 7 April 2010, 17.00.00 (Brussels local time)

Indicative budget: EUR 590 052 000 from 2010 budget4

3. The call elements

Research areas and funded topics:

A list of topics with references to the work programme.

The funding scheme:

Each call will specify the funding schemes for each of the measures it contains.

Budget:

Total budget allocated for the call

The schedule:

Deadline for the submission of proposals, the date for starting the project, project duration, application follow-up.

The procedure for evaluating the applications:

Pre-proposal selection criteria, award criteria.

project and plan your project management

11 Structure the

Step III -

cation

Formalizing

your appli-

9 Reference

documents

10 Planning:

Organize the writing of the application

12 Design the project budget



Chapter 10- Planning: Organize the writing of the application

The call for proposals is accompanied by other documents, which are necessary to be collected and used in order to well prepare its application.

1. Organize the reply to the call

Study the feasibility of the project Distinguish between financial and administrative aspects and scientific and technical components

Distributing the task of filling in the different parts of the application form to the partners

2. The system of electronic submission of the applications (EPSS, the Electronic Proposal Submission Service)

Specific access on the CORDIS web portal, according to call of proposals and depending on the corresponding subschema.

The coordinator and the partners are required to register and receive an identification number (PIC Participant Identification Code)

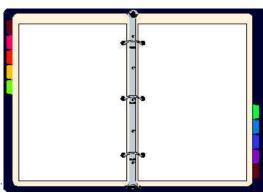
The required information

Administrative information (Part A)

Project summary Information on the coordinator and the partners Budget

The research proposal (Part B and Annexes)

Scientific / Technical Presentation of the project Implementation of the project Expected impact



Step III -Formalizing your application

9 Reference documents

10 Planning: Organize the writing of the application

11 Structure the project and plan your project management

12 Design the project budget



Chapter 11- Structure the project and plan your project management

1. Establish a coherent work plan

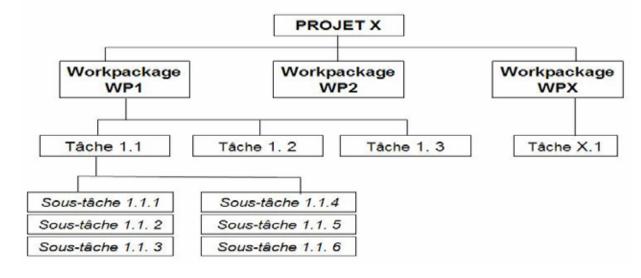
Before filling in the application form, it is useful to begin planning activities and making a schematic and visual project.

2. Useful tools

Building the work plan includes 3 stages:

1 - Dividing the project into tasks and sub tasks, grouped in work packages

The tasks (or activities) are associated with the project's objectives you set at the outset. The work plan will list the tasks with clear titles



2 - The estimated time required

You must link the work plan and the tasks it includes to a schedule and set the duration of each task. This may be done for example using a Gantt chart or PERT.

3 - Budget planning

Finally, planning tasks must integrate the «costs» data. You encrypt the cost or the contribution of each task and subtask.

Step III -Formalizing your application

9 Reference documents

10 Planning: Organize the writing of the application

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Chapter 12- Design the project budget

The budget to be submitted to the European Commission must disclose in detail all expenditures and receipts provided.

Some principles

The budget must be

- Detailed
- Balanced
- Expressed in EUROS.

Welcomeurope offers a training session dedicated to building the budget to FP project.

Building the budget for a EU project responds to strict budget rules and specific guidelines that you need to control when seeking a grant from FP7.

Step III -Formalizing your application

9 Reference documents

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How to obtain FP7 funds for your European research projects?

Plan and draft a European research project in the framework of the European Commission 7th Framework Programme for Research & Development.

If you have projects involving research and innovation, particularly in the fields of energy, industry, health, environment, transport or new technologies, you will need to understand the requirements and structure of FP7, the techniques for setting up the project and the parts played by partners in the consortium. You will also need to know how to draw up a consistent and relevant budget, draft application forms and present a project that meets the expectations of the European Commission.



Comment faire financer uos projets européens de recherche dans le cadre du 2^{ème} PCRD ?

Concevoir et rédiger un projet européen de recherche dans le cadre du 7^{ème} Programme-Cadre de Recherche et Développement de la Commission européenne.

Vous avez des projets de recherche et d'innovation, notamment dans les domaines de l'énergie, l'industrie, la santé, l'environnement, le transport ou bien les nouvelles technologies ? Maîtrisez la logique et la structure du 7^{ère} PCRD, les techniques de montage de projet et le rôle des partenaires dans le consortium. Proposez un budget cohérent et adapté, rédigez les formulaires de candidature et présentez un projet conforme aux attentes de la Commission européenne.





How to manage FP?-funded European research projects?

Comply with the obligations and management best practices of a project funded by the 7th Framework Programme for Research & Development.

Negotiate your contract with the European Commission. Fulfil the obligations linked to the signature of the contract and set up administrative and budgetary monitoring tools for your project. Understand your project's and your partnership's administrative and financial management tools in order to optimise coordination. This training reviews the rules and obligations linked to a project funded within FP7.



Comment gérer des projets européens de recherche financés par le 2^{ème} PCRD ?

Respecter les obligations et les bonnes pratiques de gestion d'un projet financé par le 7^{ères} Programme Cadre de Recherche et Développement de la Commission européenne.

Négociez votre contrat avec la Commission européenne. Respectez les obligations liées à la signature de ce contrat et mettez en place des outils de suivi administratif et budgétaire de votre projet. Maîtrisez ainsi les outils de gestion administrative et financière de votre projet et de votre partenariat afin d'optimiser la coordination de votre projet. La formation fait le point sur les règles et les obligations liées à la gestion d'un projet subventionné dans le cadre du 7^{ton} PCRD.





A TEAM AT YOUR SERVICE

Welcomeurope is at your disposal to assist you in all phases of your project.

Assistance / Consultancy

Formalising applications, building partnerships, designing budgets...

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Good luck with your projects and contact us for any assistance!



Following worked together to draft this guide:

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