



So, you are thinking of being a coordinator?

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WARNING

- This presentation is not a substitute for reading the guides at msu.euramet.org/downloads...
 - Guide 1: Admissibility and eligibility
 - Guide 2: How to write a PRT
 - Guide 4: How to write a JRP
 - Guide 5: Project Administrative Data
 - Guide 6: Evaluation
 - Guide 7: How to write a SIP
- or studying the Annotated Model Grant Agreement


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A large, abstract graphic on the left side of the slide, composed of several overlapping, curved blue shapes in various shades of blue, creating a sense of motion and depth.

EURAMET

Introduction to EMPIR

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EMPIR  **EURAMET**
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EURAMET is...



- The gateway to Europe's integrated metrology infrastructure
- It facilitates access to European measurement expertise, and underpins the delivery of globally competitive, high impact metrology
- It ensures Europe maintains its global reputation for excellence in measurement science
- It raises awareness of the value of measurement by demonstrating the impact of metrology on society's grand challenges

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European Association of National Metrology Institutes



Members:

- 37 European NMIs
- 28 of them are participating in EMPIR**

Associates:

- 79 DIs (Designated Institutes)

Liaison Organisations:

- 4 RMOs & BIPM
- 3 NMIs beyond Europe
- KMA (Kosovo under UNSCR 1244)
- 7 regional/international Organisations



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What is EMPIR?



- It is about improving measurement to drive innovation and competitiveness, and to support regulation and quality of life.
- It enables European metrology institutes, industrial organisations and academia to collaborate on joint research projects.
- It is implemented by EURAMET (European Association of National Metrology Institutes).

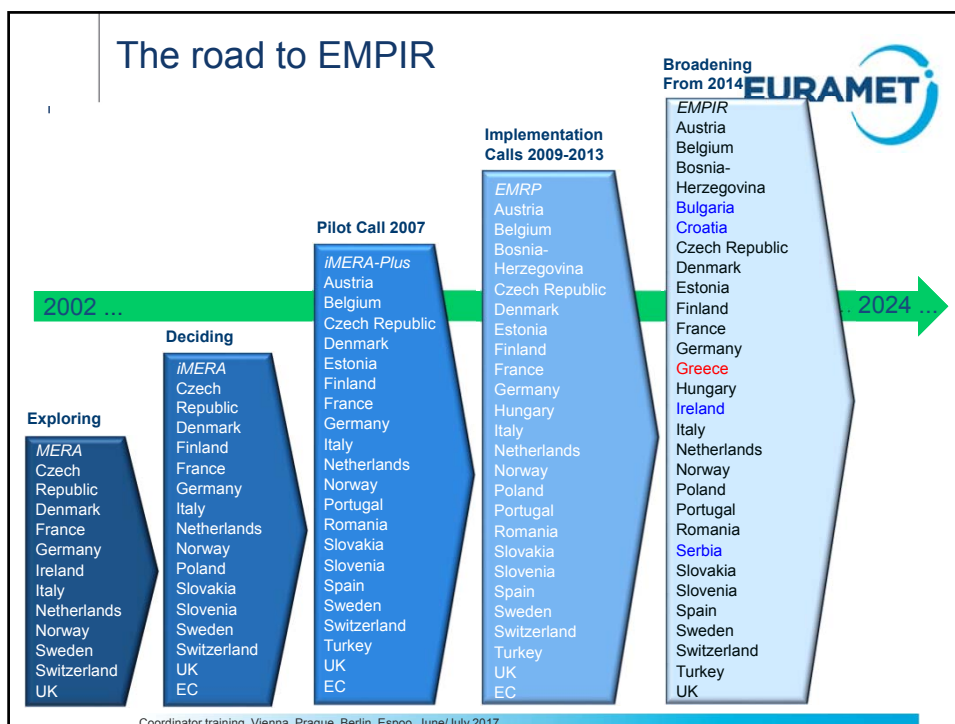
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How does it work?



- It is based on Article 185 of the Lisbon Treaty.
- It is jointly funded by the EMPIR participating countries and the European Union and has a budget of approximately 600 M€ over seven years.

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EMRP inputs

• Projects selected	119
• JRP funding contracted	367 968 461 €
• RG funding contracted	39 710 531€
• Funded years in JRPs	2116
• Unfunded years in JRPs	123
• Funded years in RG	498
• Total participations	2423

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EMRP outputs



- Excellent science – focussed on society’s needs
 - At one extreme the application of ground breaking physics to fundamental metrology
 - At the other, direct application to measurements that enable regulation
 - In-between, measurements that promote innovation

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EMRP outputs



Conference presentations /posters	4915
Other dissemination activities	2155
Peer-reviewed publications	1432
<i>Co-authored peer-reviewed publications (of the above)</i>	368
Inputs to standards committees	1135
<i>No. of unique standards committees engaged with (of the above)</i>	486
Training activities (internal)	463
Training activities (external)	557
Patent applications	36
Total number of unique outputs	10693

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EMPIR inputs



• Projects selected	91
• JRP total value	227 870 939 €
• EU Contribution	112 444 953 €
• National Contribution	100 752 808 €
• Self contribution	14 673 178 €
• Years effort in JRPs	1276
• Total participations	2423

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Impact: programme perspective



EMRP / EMPIR

High-level objectives	<ul style="list-style-type: none"> • European growth and jobs • Respond to global challenges • Create an integrated European Metrology Research System
↕	
Specific objectives	<ul style="list-style-type: none"> • Boost industrial uptake of metrology research supporting development of new & improved products and services • Improve standardisation / regulation • Underpin a coherent, sustainable and integrated European metrology landscape

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EMPIR objectives



Boost industrial uptake and improve standardisation

- At least 400 M€ of European turnover from new or significantly improved products and services that can be attributed to the research activities of EMPIR and its predecessors
- At least 60 % of CEN/CENELEC /ISO/IEC Technical Committees and equivalent standardisation bodies with potential to benefit directly from EMPIR projects to engage with the programme

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EMPIR objectives



Boost industrial uptake and improve standardisation

- At least 400 M€ of European turnover from new or significantly improved products and services that can be attributed to the research activities of EMPIR and its predecessors. **109 M€ identified so far**
- At least 60 % of CEN/CENELEC /ISO/IEC Technical Committees and equivalent standardisation bodies with potential to benefit directly from EMPIR projects to engage with the programme **Contributions to 17 published and 103 draft standards**

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EMPIR objectives



Underpin a coherent, sustainable and integrated European metrology landscape to fully exploit the EU potential

- Maintain a level of at least 50 % of dedicated national metrology research investments in Europe being coordinated or influenced via the programme
- All European NMIs and their designated institutes to interact with the programme
- European leadership in at least 20 % of international metrology committees

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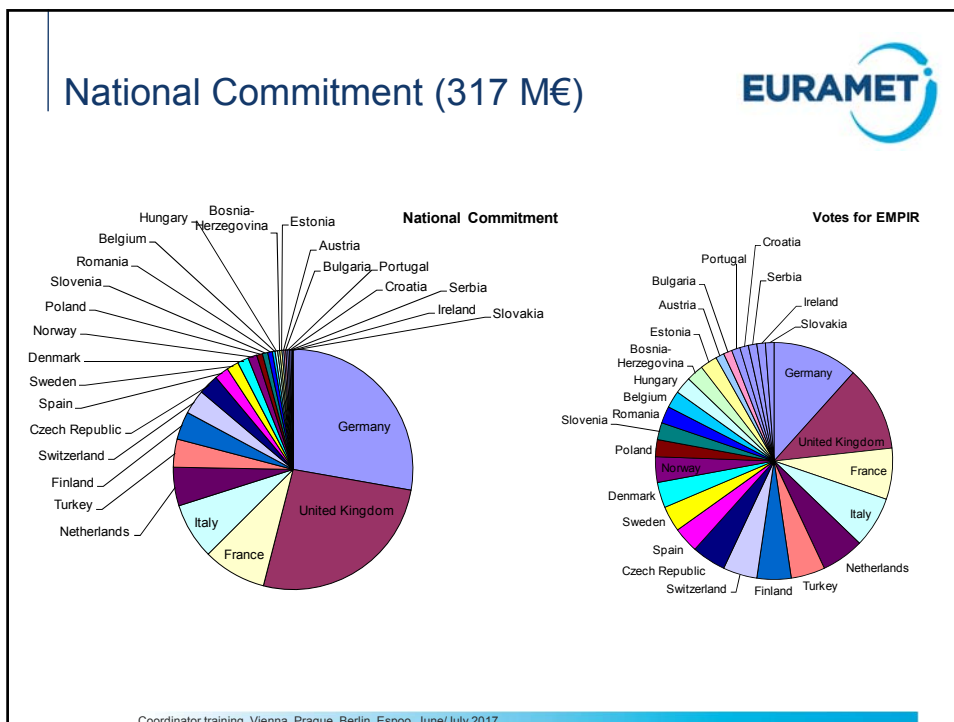
EMPIR objectives




Underpin a coherent, sustainable and integrated European metrology landscape to fully exploit the EU potential


- Maintain a level of at least 50 % of dedicated national metrology research investments in Europe being coordinated or influenced via the programme **Level maintained**
- All European NMIs and their designated institutes to interact with the programme **Cyprus, Luxembourg, Malta**
- European leadership in at least 20 % of international metrology committees **50 %**

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Questions?








EMPIR – Rules for Participation

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Implementation

- EURAMET has to follow the Horizon 2020 “Rules for Participation” and many other H2020 requirements - less flexibility than under EMRP
- EC define the financial rules
- EC define text in the contracts (often standard H2020)
- EURAMET is obliged to use EC/H2020 guidelines in some cases – not write our own

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Participation in EMPIR

Internal Funded Partner(s)	<ul style="list-style-type: none"> • EURAMET NMIs and DIs (within their area of designation) from countries that have made a financial contribution to EMPIR (see List 1a).
External Funded Partner(s)	<ul style="list-style-type: none"> • All other legal entities established in: Member States, Overseas Countries and Territories (OCT) linked to MS, countries automatically eligible for Horizon 2020 funding, countries associated to Horizon 2020, including non-EMPIR NMIs and DIs plus EMPIR DIs participating outside their field of designation (see List 1b)
Unfunded Partner(s)	<ul style="list-style-type: none"> • Any legal entity whose participation adds benefit to the project. • Legal entities that are eligible to participate as 'internal' or 'external' may participate as an unfunded partner
Linked Third Party(s)	<ul style="list-style-type: none"> • Very rare. • Please speak to MSU first.

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External participation

- 90 M€ (30 % of the EU contribution) is intended for the participation of non NMI/DIs as External Funded Partners.
- Legal entities may choose to participate as Unfunded Partners and EURAMET would consider this as particularly appropriate where an industrial partner would receive a significant benefit from its participation.
- '20XX Call budget and features' indicates the anticipated external participation etc for each TP.

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Underlying principles of eligible costs



Requirements for eligible costs

- Actual
- Recorded accurately in the organisation's accounts
- Incurred during the project lifetime
- Necessary for the project
- Budgeted for
- Economic
- Exclude non-eligible items
- Exclude profit
- Co-funded

Not eligible

- Return on capital
- Interest, debt service charges
- Provisions
- Exchange losses
- Excessive or reckless expenditure
- Deductible VAT
- Other EU funding
- Costs incurred by another partner for contracted work

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Costing your proposal and the budget...



- When a consortium submits a project protocol and datasheet they are effectively agreeing that that the work described can be delivered by the contracted parties for the resources and costs indicated (and not just that they are willing to deliver it for the price (i.e. the level of funding) indicated).
- Essentially – DON'T HIDE COSTS or ORGANISATIONS
- The budget is the budget for the whole project and no part is 'specifically owned' by particular partners

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Cost categories (1)

Labour (Article 6.2A of the AGA)	Subcontract (Article 6.2B of the AGA)	T&S (Article 6.2D1 of the AGA)
<ul style="list-style-type: none"> • 3 labour categories • Actual personnel costs • Average personnel costs • Unsalaries SME owners and natural persons 	<ul style="list-style-type: none"> • Only the subcontract of activities / items identified in Annex 1 (Protocol) • Rare in EMPIR – contact MSU if planning to budget for this • Pre-approval required 	<ul style="list-style-type: none"> • Attendance at project meetings, • Attendance at a workshop, • Presentation at a conference, • Visit or secondment to another participant to undertake joint testing

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Cost categories (2)

Equipment (Article 6.2D2 of the AGA)	Other goods and services (Article 6.2D3 of the AGA)	Large Research Infr' (Article 6.2D4 of the AGA)
<ul style="list-style-type: none"> • Minor equipment • Depreciation costs of capital equipment • Renting or hiring of facilities • Purchase of equipment which is required solely for the project 	<ul style="list-style-type: none"> • Consumables • Registration fees for conferences • Catering for a meeting • Engineering workshop costs • Reimbursement of T&S costs for invited speakers at a workshop organised by the project • Publication fees for open access journals. 	<ul style="list-style-type: none"> • Only applicable for cases where EC has approved the organisation's methodology for declaring costs for the large research infrastructure • Rare in EMPIR – contact MSU if planning to budget for this

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Open access to scientific publications



- Each beneficiary must ensure open access (free of charge, online access for any user) to all peer-reviewed scientific publications relating to its results.
- In particular, it must:
 - as soon as possible and at the latest on publication, deposit a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication in a repository for scientific publications
 - ensure open access to the deposited publication at the latest:
 - on publication, if an electronic version is available for free via the publisher, or
 - within six months of publication in any other case.

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EURAMET Repository Link



- EURAMET no longer stores publications in a repository of its own.
- As the EMPIR Grant Agreement requires publications to be “open access” and have a “persistent identifier” the Euramet Repository Link now links publications to projects and provides access to the publication through the persistent identifier.
- See <https://www.euramet.org/repository/research-publications-repository-link/>



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Indirect costs and EU contribution



- Eligible indirect costs are fixed
 - 5 % for Internal Funded Partners
 - 25 % (H2020 standard rate) for other partners
- EU contribution is calculated as 100 % of total eligible “Costs”
- The same level of resource and cost data is required from all types of participant (including unfunded partners)

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Financial Audits



- A ‘certificate on the financial statements’ (drawn up in accordance with Annex 5) is required for each beneficiary [and for each linked third party], if it requests a total contribution of 325 k€ or more, as reimbursement of actual costs and unit costs calculated on the basis of its usual cost accounting practices (see Article 5.2 and Article 6.2, Point A)
- Will only be required from a minority of partners, but...
 - if budgeted costs are very close to the limit it would be wise to budget for an audit
- (However EURAMET may still audit)

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JRP Reporting (based on 36 month project)



- Formal Reporting periods of 18 months (60 days to submit)
- Interim reporting every 9 months (45 days to submit)
- In addition Data Management Plans and Ethics reports may be required

Months	Report type	Period covered	Technical and Impact Reporting	Financial Reporting
9, 27	Interim	Previous 9 months	Yes	No
18, 36	Periodic	Previous 18 months	Yes	Yes
36	Final Public	Full 36 months	Yes	No

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Grant Agreement



See



- http://ec.europa.eu/research/participants/data/ref/h2020/other/mga/art185/h2020-mga-empir-multi_en.pdf (158 pages)

And


- http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf (747 pages)

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Questions?




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EMPIR Instruments

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EMPIR projects



Two types of project under EMPIR that receive funding from the Commission pot:

- Joint Research Projects (JRPs)
 - RPTs are not a different type of project, they are just one theme within JRPs, just like ENG, ENV, HLT, IND, SIB, FUN, NRM
- Support for Impact Projects (SIPs)

EMPIR Mobility Grants are funded from the Member States' cash and are just for employees of European NMIs and DIs.

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EMPIR indicative call plan

- Long-term orientation, yet with some room for flexibility at annual updates
- Three-year call intervals for some themes to enable follow-on projects
- Annual calls for “support for impact” actions and standardisation related research (except 2014)
- Calls for research potential focus on the first five years, with the aim that RPT participants then participate in the wider JRPs eg SIB, IND in the later part of EMPIR

Year	Call
2014	Industry JRPs
	Research Potential JRPs
	Support for Impact (SIPs)
2015	Health JRPs
	SI Broader Scope (SI) JRPs
	Pre-normative JRPs
	Research Potential JRPs
	SIPs
2016	Environment (ENV) JRPs
	Energy (ENG) JRPs
	Pre-normative JRPs
	Research potential JRPs
	SIPs
2017	Fundamental JRPs
	Industry JRPs
	Pre-normative JRPs
	Research Potential JRPs
	SIPs
2018	SI JRPs
	Health JRPs
	Pre-normative JRPs
	Research Potential JRPs
	SIPs
2019	ENV JRPs
	ENG JRPs
	Pre-normative JRPs
	SIPs
2020	Industry JRPs
	Fundamental JRPs
	Pre-normative JRPs
	SIPs

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EMPIR projects – New in 2018



Joint Network Projects

- In some areas there is a need for a long term ongoing dialogue between the metrology community and relevant stakeholders. This dialogue should support the takeup of research outputs from the metrology community and the collection of needs from industry to inform future research.
- Joint Network Projects (JNPs) will fund activities enabling the development of organisations that support this dialogue - 5 years funding for networking (not research) activities

New

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Call process





Inputs, criteria:




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Questions?



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FUN Scope 2017



- Research at the frontiers of measurement science is critical to major advances in science, and vice-versa, and the take-up of excellent science from outside the NMIs and DIs is a key element in the long-term development of metrological capabilities.
- The call scope of TP fundamental scientific metrology:
 - aims at excellent science exploring new techniques or methods for metrology and novel primary measurement standards, and
 - shall bring together the best scientists in Europe and beyond, whilst exploiting the unique capabilities of the NMIs and DIs.
- The call on fundamental scientific metrology does not predefine specific technical topics. However, it is expected that the R&D will include high risk research proposals.

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IND Scope 2017



- This Call again supports the development of measurement methods and techniques for industrial applications, aimed at driving innovation in industrial production and facilitating new or significantly improved products through exploiting knowledge in the European measurement institutes. The innovations shall improve the competitiveness and sustainability, and enable the digitisation of, European industry and shall lead to increased economic turn-over.....

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NRM Scope 2017



- The overall strategic aim of the Targeted Programme (TP) “Pre- and co-normative research” is to develop **metrological methods and techniques required for standardisation**.
- EURAMET encourages proposals that include representatives from industry, regulators and standardisation bodies for their active participation in the projects, specifically to ensure that the project outputs are **acknowledged by the SDO TC/WG**.

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Chief Stakeholder



- NRM proposals must name a “Chief Stakeholder”, not a member of the consortium, but a representative of the user community that will benefit from the proposed work.
- The “Chief Stakeholder” should write a letter support explaining how their organisation will make use of the outcomes from the research, be consulted regularly by the consortium during the project to ensure that the planned outcomes are still relevant, and be prepared to report to EURAMET on the benefits they have gained from the project.



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RPT Scope 2017



- EURAMET intends that EMPIR will develop a balanced and integrated metrology system in the participating states.
- For those States with limited metrology research capability, “Research Potential” projects should enable them to **develop their scientific and technical research capabilities in areas of national and regional strategic priority.**

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RPT Scope 2017



Potential Research Topics (PRTs) submitted for this TP should identify

- the particular metrology needs of stakeholders in the region,
- the research capabilities that should be developed (as clear technical objectives),
- the impact this will have on the industrial competitiveness and societal needs of the region,
- how the research capability will be sustained and further developed after the project ends.

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RPT Scope 2017



- The development of the research potential should be to a level that would enable participation in other TPs.
- Proposers should note that the programme funds the activity of researchers to develop the capability, not the required infrastructure and capital equipment, which must be provided from other sources.

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RPT Scope 2017



- While PRTs (submitted at Stage 1) can focus on national needs, the Joint Research Proposals (submitted at Stage 2) must combine the strategic priorities of several states and develop an integrated and coordinated response (“smart specialisation”) at the European or regional level.
- The consortium need to identify measures that they will use to demonstrate that the project has narrowed the gap between the capabilities of their consortium and other NMIs/DIs in Europe and to report the outcomes at midterm and at the end of the project



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SIP Scope 2017



...sometimes an opportunity for further significant exploitation and stakeholder uptake occurs after the research is complete...
Such further exploitation may include:

- An identifiable contribution to a **documentary standard** in response to a request from a Technical Committee or Working Group of a European or International standards developing organisation.
- An identifiable contribution to a **regulatory process** in response to a request from a European or International regulatory body.

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SIP Scope 2017



- Transfer of specific technology or knowledge to a commercial business in response to a request to progress their innovation activities (e.g. product or process development).
- A key requirement is an external request for the work from an organisation ready to take up the outputs of the project and move them on to impact outside the metrology community. The organisation making this request is called the “**Primary Supporter**”. Without such a willing recipient expressing support for the proposal and identifying the actions they will take with the outputs of the project, the proposal would have no evidence of the route to impact and should not be funded.

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RMG



- A Researcher Mobility Grant provides financial support for a researcher to undertake research activities relevant to a JRP.
- The research must be undertaken at a Guestworking Organisation (an Internal Funded Partner) located in a different country to the researcher’s employer.
- The researcher must be employed by a EURAMET NMI or DI.
- RMG allowances include research and development allowance, living allowance, travel allowance and family allowance – it does not fund the researcher’s salary costs.
- An RMG expands the project outcome and at the same time supports less experienced researchers by updating their skills and also facilitates networking between researchers and institutions within the EURAMET community

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Call 2017 Budget and Timetable



- http://msu.euramet.org/current_calls/documents/Call2017_Budget&features.pdf

EMPIR Work Programme EMPIR Call 2017 - Budget and Features



Document: P-PRG-GUI-046 Version: 1.1
Approved: EMRP Programme Manager 2017-06-08

The EMPIR Call Process Guides are written generically to apply to all EMPIR calls. Where there are particular numbers, dates, or options that apply to a particular call then those details are given in the table below. Readers should start with the Guides for an explanation of the call process and refer to this table when directed for the specific information on an individual TP or call.



	Joint Research Projects TP FUN	Joint Research Projects TP IND	Joint Research Projects TP NRM	Joint Research Projects TP RPT	Support for Impact Projects
Indicative budget (EU Contribution)	15.6 M€	24.3 M€	4.8 M€	2.3 M€	0.5 M€
Average EU Contribution per project	1.5 M€	1.5 M€	Strand 1 <0.6 M€ Strand 2 1.2 M€	-	0.1 M€

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Questions?




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Ensuring impact

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Impact



~~come into forcible contact with another object~~

marked effect or influence

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A change of focus

Purely scientific focus:

- Thought leadership with an emphasis on being
- Says: “We are leading experts in our field”
- Benefits are mostly internal


Application focus:

- Focus on the external impact, an emphasis on doing
- Says: “Our expertise enables you to be good at what you do”
- Benefits realised are both internal and external

When the best is not enough:

- You can develop the best standard in the world.....
.....but if it just sits in the lab.....gathering dust....
.....then you may as well not bother

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Projects are about change...

The first question is what needs to change...

For our customers (the users of metrology):


- Where are **they** now?
- Where do **they** need to be? Where do **we** want **them** be?
- How are **we** going to get **them** there? ←

For us:

- Where are **we** now?
- Where do **we** want to be?
- How are **we** going to get there? —

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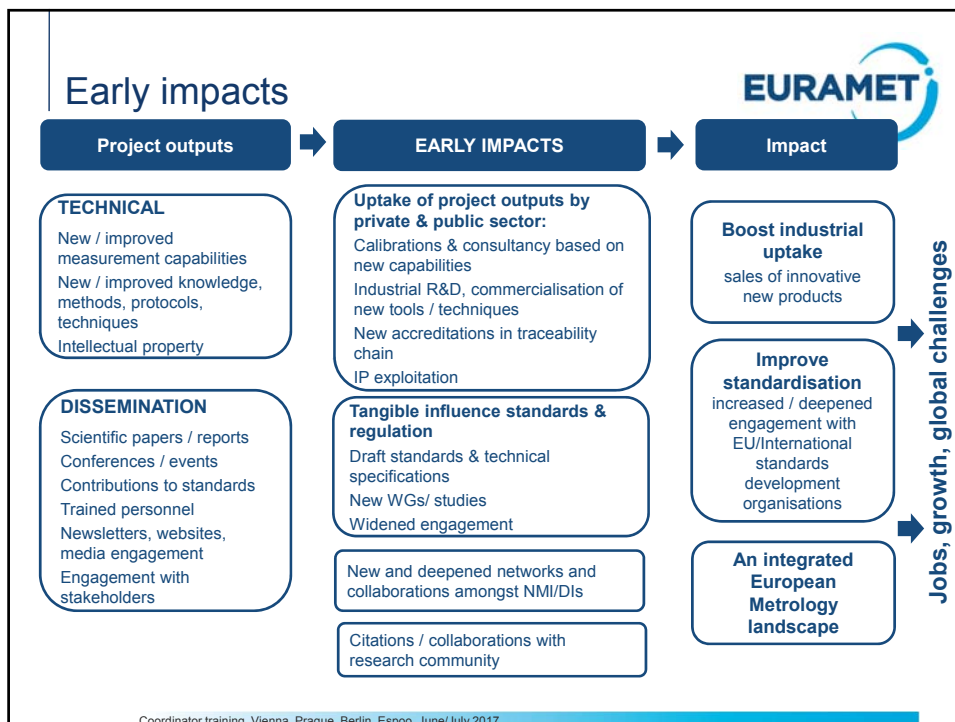
Maximising impact



So...

- **Widen out:** realise it's not just about your interests
- **Engage:** include external stakeholders in planning & delivery
- **Consult:** understand each stakeholder's needs
- **Adapt:** think about their context as well as yours
- **Respond:** deliver a compelling, relevant proposition
- **Empower:** make it easy for them to make the change

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Maximising impact



During the project, keep the focus on early impact

- Keep the project's over-arching objectives in focus throughout the project
- Increase focus on impact as project progresses
- Ensure those around you have a clear understanding of what impact is and why it is important
 - It is not outputs
 - It is not dissemination

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Maximising impact



- Proactive engagement
 - If you have a stakeholder or advisory group use them
 - Prioritise efforts regarding standards committees
 - Respond to public consultations
 - Follow up interest from dissemination activities
- Recognise and report impacts
 - Ask questions of your project collaborators
 - Ask questions of your contacts/ collaborators/ stakeholders
 - Capture and report impact

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Impact objectives



SRT objectives usually include one related to impact which sets the expectation for the referees when scoring the impact criteria.

For example:

“To facilitate the take up of the technology and measurement infrastructure developed in the project by the measurement supply chain (accredited laboratories, instrument manufacturers), standards developing organisations (e.g. IEC TC 58, IEC TC 77 and standards bodies associated with Radio Equipment Directive (RED) 2014/53/EU such as ETSI) and end users (the communications and automotive industries).”

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Impact objectives



The last objective in all RPT SRTs

“For each participant, to develop an individual strategy for the long-term operation of the capacity developed, including regulatory support, research collaborations, quality schemes and accreditation. They should also develop a strategy for offering calibration services from the established facilities to their own country and neighbouring countries. The individual strategies should be discussed within the consortium and with other EURAMET NMIs/DIs, to ensure that a coordinated and optimised approach to the development of traceability in this field is developed for Europe as a whole.”

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Questions? Coffee/Tea Break?



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Purpose of this session



- Give you an overview of the full job – it lasts 4 years, not just this summer
- Pass on the experience of existing coordinators
- Help you decide
 - If you want to do the job
 - How you want to do the job – which parts of the role you have the skills to do, and which parts you want to delegate to others

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Coordinator responsibilities



- Project management of the bid and the project,
- Compiling the proposal and the costing information,
- Communication within the consortium and with EURAMET,
- Negotiating contracts,
- Technical and financial reporting for the life of the project.
- Representing the consortium throughout the project.
- Driving all the processes – proposing, winning, negotiating, delivering and reporting – replying quickly to EURAMET, getting information quickly from the consortium.

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Some roles the coordinator may have...



Impact and promotion

- Consulting and involving stakeholders
- Finding new researchers to extend the project
- Presenting the project as a whole
- Linking to H2020

Impact WP leader

Strategic direction

- Leading the consortium to ensure that all the various parts come together to deliver what was promised in the proposal, despite the unexpected.

Coordinator

Tactical project delivery

- Keeping the “drum beat” – setting timescales – delivering to plan
- Knowing how each partner is progressing
- Reporting to EURAMET

Project support

Science Leader

Coordinator

Superman / Superwoman

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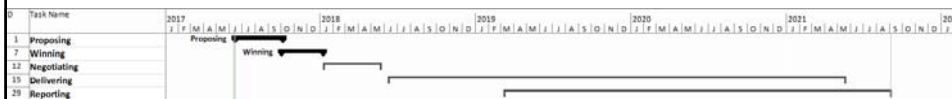
Existing coordinators say...



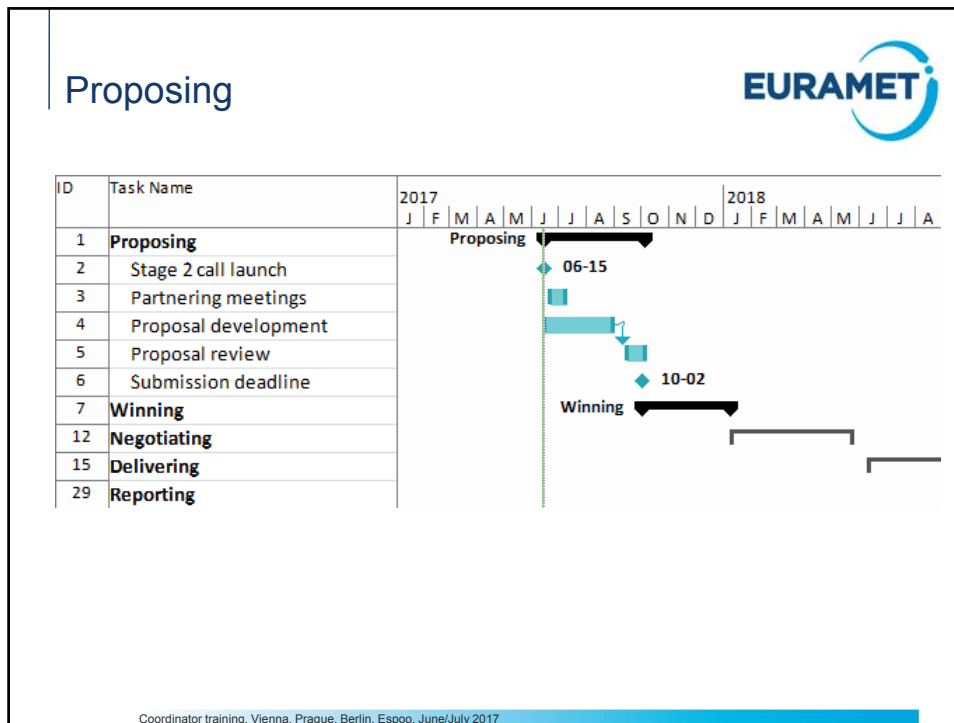
- The prime role of the coordinator is to manage the project – ensuring the process of working together and reporting progress runs smoothly. If you don't have those skills then find an assistant that does, and enable them to do the job efficiently.
- Talk to an existing coordinator – take good ideas on impact and project structure from successful projects. See Guide 4 for examples on management approach and details of partners. Write a proposal structured like the final protocol but remember to put in the text that allows the referees to score against their evaluation criteria.
- Ask someone to check your proposal against “List 4”.
- Ask someone outside the team to review the proposal against the referees’ evaluation criteria.

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The big picture



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Forming your consortium...



- Your consortium needs a vision of how EURAMET members can best respond to the needs identified in the SRT. This will emerge in discussion. Don't start from what you want to do, but from what the stakeholder need is.
- Can you involve the stakeholders in your consortium? If not as partners delivering part of the content - then as collaborators offering guidance during the project.

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Forming your consortium...



- You will identify technical leaders that will take responsibility for individual work packages, including the “impact” work package that will be key to the success of your proposal.
- The person in your group with the clearest understanding of the need and the best links to the stakeholders may be the best person to lead the impact work package and present the project at the Review Conference.

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Writing your proposal...



- The JRP should:
 - Address the SRT – do research, not routine work or transfer of expertise
 - Be scientifically excellent, and progress work beyond the current state-of-the-art
 - Create impact
 - Have valid contributions from all partners
 - Not duplicate work between partners (unless there is a strong valid reason)
- Detailed guidance and templates can be found at msu.euramet.org

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Costing your proposal... The Principle...



- When a consortium submits a protocol and Project Administrative Data Spreadsheet they are effectively agreeing that that the work described can be delivered by the contracted parties for the resources and costs indicated (and not just that they are willing to deliver it for the price (i.e. the level of funding) indicated).
- Essentially – DON'T HIDE COSTS or ORGANISATIONS

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Costing your proposal...



All internal funded partners must take note of their country's national commitment across all JRPs – the TP Facilitators will monitor this...

- BUT there is no 'pre-defined share' of an individual JRP for any internal funded partner
- A country with a small national commitment may play a significant part in an individual JRP whilst for example a 'larger country' may make a small contribution to the JRP
- The TP Facilitators will monitor the external participation as if it were an additional single country.

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Who are the TP Facilitators and what is their role?



- helen.margolis@npl.co.uk for TP FUN
 - Ddelcampo@cem.minetur.es for TP IND
 - Eveline.Domini@Ine.fr for TP Normative
 - Tanasko.Tasic@euramet.org for TP Research Potential
 - paula.knee@npl.co.uk for SIPs
- Their role is to facilitate the process from the proposers side,
 - to collate information from the various proposers during the call period,
 - to enable the EMPIR Committee to ensure that the submissions take due recognition of the national contribution profiles.

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Submission to facilitators



- Copy Facilitator sheet from Template 5 and email to them by:
 - 14 July
 - 2 August
 - 25 August
 - 8 September
- Feedback will come through your EMPIR Committee member

	A	C	D
1	EMPIR Call 2017 Project Administrative Data		
2	JRP	<Select Project>	
3	Coordinating Partner	<Select Organisation>	
4	Coordinator		0
5	version date	00-Jan-00	
6	<i>Analysis of Internal funding</i>		
7	Country	EU Contribution	
8	Austria	-	
9	Belgium	-	
10	Bosnia and Herzegovina	-	
11	Bulgaria	-	
12	Croatia	-	
13	Czech Republic	-	
14	Denmark	-	
15	Estonia	-	
16	Finland	-	
17	France	-	
18	Germany	-	
19	Hungary	-	
20	Ireland	-	
21	Italy	-	
22	Netherlands	-	
23	Norway	-	
24	Poland	-	
25	Portugal	-	
26	Romania	-	
27	Serbia	-	
28	Slovakia	-	
29	Slovenia	-	
30	Spain	-	
31	Sweden	-	
32	Switzerland	-	
33	Turkey	-	
34	United Kingdom	-	
35	Total Internal (€)	-	
36	Total External (€)	-	
37	TOTAL Funded (€)	-	
38	External as % of total funded	#DIV/0!	

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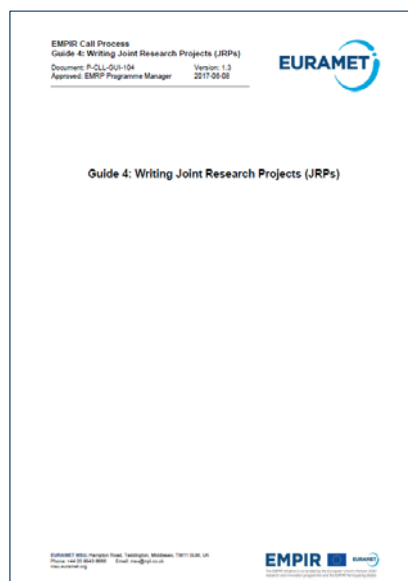
How will this work?



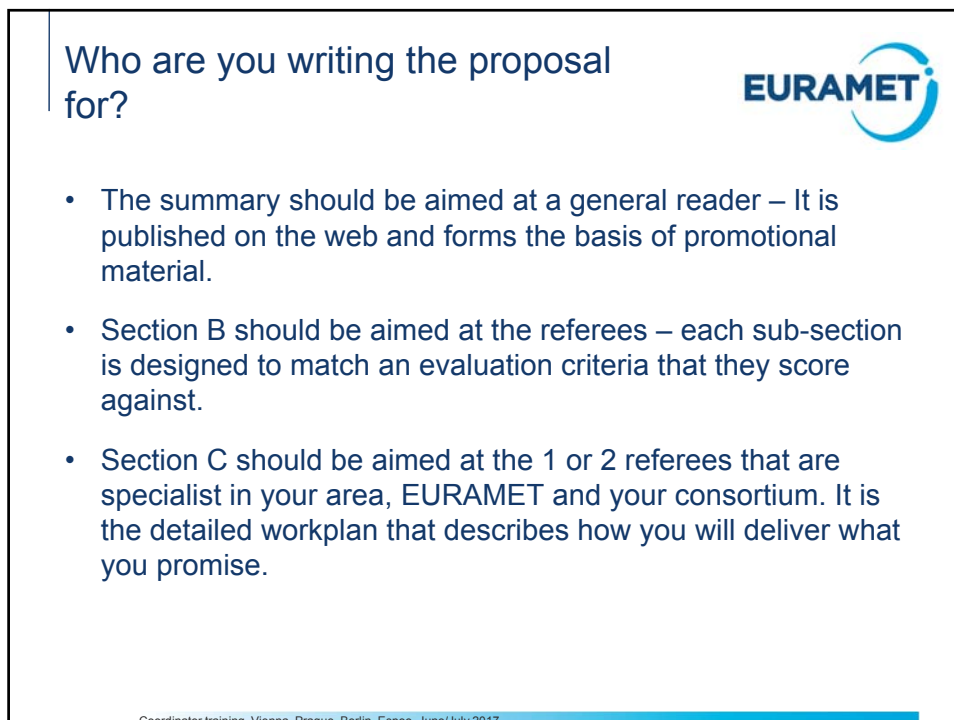
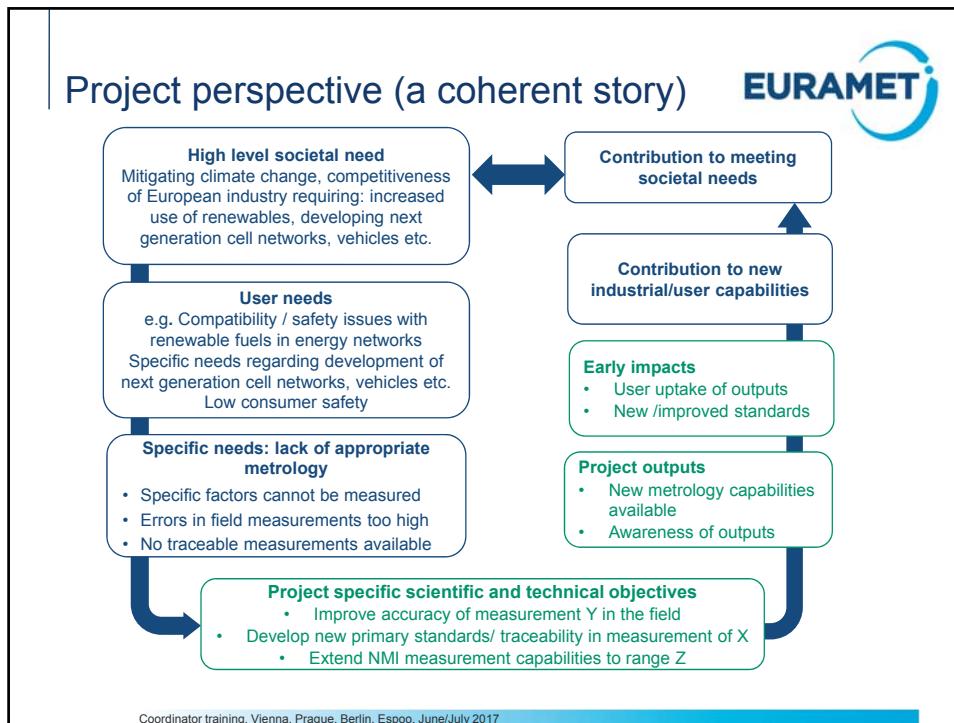
- All Internal Funded Partners must talk to their EMPIR committee member and agree the resources that can be committed to a JRP from their country.
- Coordinators must register with the appropriate facilitator and keep them updated with the costs of their project by country as they develop.

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Guide 4



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Scientific and/or technological excellence



- You write:
 - B1a Summary
 - B1b Overview of the objectives
 - B1c List of deliverables
 - B1d Need
 - B1e Progress beyond the State of the Art

- See examples in Guide 4

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The referees are asked to consider...



Scientific and/or technological excellence

- To the extent that the proposed work corresponds to the SRT:
 - Clarity and pertinence of the objectives
 - Soundness of the concept, and credibility of the proposed methodology;
 - Extent that the proposed work is beyond the state of the art, and demonstrates innovation potential (e.g. ground-breaking objectives, novel concepts and approaches, new products, services or business and organisational models);
 - Appropriate consideration of interdisciplinary approaches and, where relevant, use of stakeholder knowledge.

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Potential output and impact from the project results



- You write:
 - B2a Projected early impact on industrial and other user communities
 - B2b Projected early impact on the metrological and scientific communities
 - B2c Projected early impact on relevant standards
 - B2d Projected wider impact of the project
- See examples in Guide 4

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The referees are asked to consider...



Potential output and impact from the project results

The extent to which the project outputs contribute at the European/International level to:

- The expected impacts listed in the SRT
- Enhancing innovation capacity, creating new market opportunities and strengthening the competitiveness and growth of companies
- Address issues related to climate change or the environment, or bring other important benefits for society;

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The referees are asked to consider...



The quality of the proposed measures to:

- Exploit and disseminate the project results (including management of IPR), and to manage research data where relevant.
- Communicate the project activities to different target audiences

The extent to which relevant stakeholders as identified in the call scope :

- have their needs explained and addressed
- are actively engaged
- are able to access the project's results

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Data management



- You write:
 - B2e Data management
- For EMPIR call 2017 onwards, the Grant Agreement will contain conditions related to open access to research data.
- Projects that 'opt-in' will be required to prepare a Data Management Plan (DMP) to detail the data that the project will generate, how it will be exploited and made accessible for verification and re-use, and how it will be selected, managed and preserved in repositories.
- If projects 'opt-in' to having a DMP they will not be required to open up all of their research data. The DMP applies primarily to the data needed to validate the results presented in scientific publications.

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Data management



- The use of a DMP is obligatory for all projects that do not 'opt-out'.
- Projects can opt-out on certain specific grounds (see Guide 4).
- Further information on DMPs is available in the
 - EMPIR Reporting Guidelines Part – 9 Preparing data management plans and in
 - Reporting Template 9 – Data Management Plan.
- A proposal will not be evaluated more favourably if the consortium agrees to share its research data, nor will it be penalised if it opts-out.

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Data management



- Your approach to research data management should be detailed in section B2.e regardless of whether your project opts-in or opts-out.
- Your proposal should address the following issues:
 - How will data be exploited and/or shared/made accessible for verification and reuse?
 - If data cannot be made available, why?
 - What standards will be applied?
 - How will data be selected, managed and preserved?
- You must state whether your proposal will 'opt-in' or 'opt-out' and explain why.

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The quality and efficiency of the implementation



- You write:
 - B3a Overview of the consortium
- See examples in Guide 4

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The referees are asked to consider...



The quality and efficiency of the implementation

- Quality and effectiveness of the proposed work, including extent to which the resources assigned to work packages are in line with their objectives and deliverables;
- Appropriateness of the management structures and procedures, including risk and innovation management;
- Complementarity of the participants within the consortium;
- Appropriateness of the allocation of tasks, ensuring that all participants have a valid role and adequate resources in the project to fulfil that role.

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Detailed plans



- You write section C & D
 - This is not about winning, but delivering
 - You need a clear plan that can be understood by the referees, tested by EURAMET at negotiation, and used by your consortium to deliver the project.
 - You need a realistic Risk Analysis to show that you know how you will adapt the project in delivery to cope with events that may happen.

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Operational Capacity



- You write section E - a section for each partner, including key roles and contributions (usually half a page per partner) including:
 - Key people
 - Key infrastructure
 - Relevant past projects (max 5)
 - Key publications, products, services (max 5)
 - Any third parties

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The referees are asked ...



- Does each participant have the necessary basic operational capacity to carry out their proposed activities?

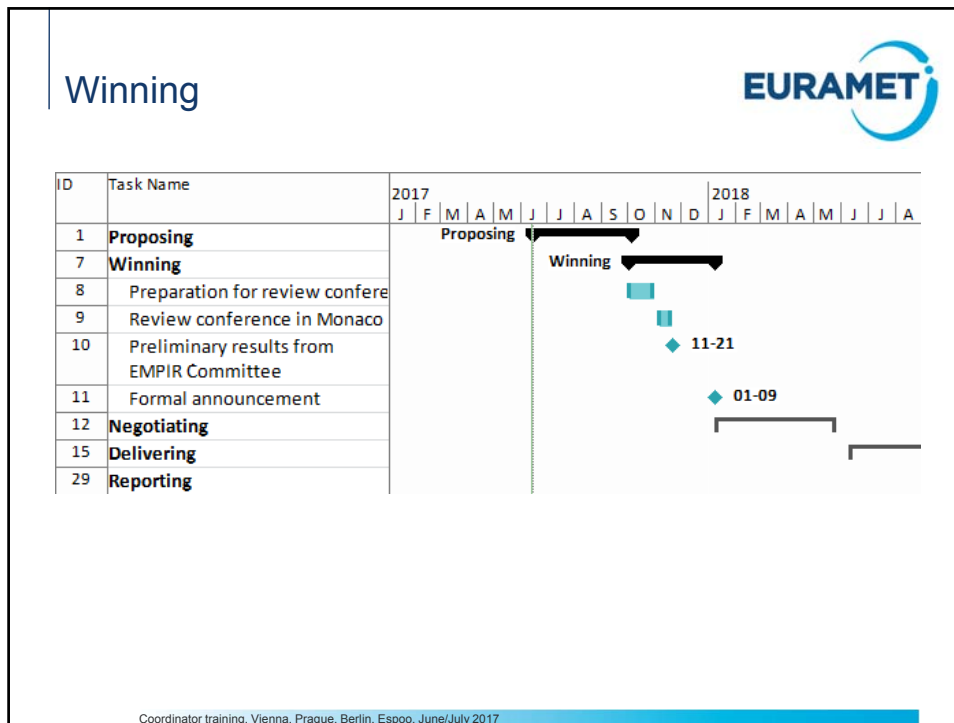
Yes/No

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Questions? Coffee/Tea Break?



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The Competition



- The Call is designed to be over-subscribed by a factor of about 2 - even if all the JRPs are of high quality we can not fund them all.
- The referees' expertise, experience, and insights will enable us to select the best projects and grants to address metrology needs in Europe.
- It is EURAMET's aim to fund projects which are scientifically excellent, delivered by high quality teams that will truly create an impact – you need to explain how your proposal meets these aims.

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“Review Conference” or “Consensus Group”?



- A Consensus Group is similar to the traditional FP7 evaluation process -
 - Referees read the proposals remotely and submit their initial comments and scores to EURAMET
 - The referees then meet (maybe by teleconference) to discuss their individual assessments and produce a consensus report giving agreed comments and scores.
 - They then rank all the proposals in their TP
 - There is no interaction with the proposers

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What is a “Review Conference”?



- EURAMET’s version of a Review Conference is a mix of European traditions -
 - a public defence of your proposal, meeting the judges and the competition
 - a competition under strict rules ensuring equal opportunity for all - “fairness”

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Review Conference - Inputs



- Proposed JRPs
- JRP posters
- Informal discussions with the referees
- Formal Questions and Answers
- Guidelines and evaluation/scoring sheets
- SRTs

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Review Conference - Outputs



- A single ranked list of JRPs for each topic
 - Referees mark JRPs in each group
 - The MSU combine these into a single list
 - All referees meet in plenary to discuss JRPs with the same marks (where the marks would affect a funding decision).
- Referee comments: to help your consortia understand their reasoning, and to support contract negotiations.

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The Poster Session



- The aim of the poster session is to ensure clarity regarding the JRPs, following referees preliminary remote reading
 - JRP representatives make a short presentation to the referees
 - Referees informally ask questions about proposals
- The referees are allocated JRPs to review
 - Each JRP will be reviewed by at least 3 referees

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Logos on posters



- Organisations' logos should only be included on review conference posters where
 - (i) the organisation is a project partner or
 - (ii) the organisation has specifically supported the project i.e. through a letter of support.

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Q&A session



- In the Q&A session, referees formally ask questions of the JRP representative. The JRP representatives will respond.
- After that you leave – your part in the process is complete. A conference dinner will be arranged for the referees and we take them into seclusion.

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Marking



- The next day, referee groups meet (with MSU facilitators) to:
 - discuss the JRP proposals, and agree consensus marks for each JRP
 - agree comments about each JRP – starting with those that received the lowest marks.

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Agreeing a Ranked list of JRPs



- A plenary session of the referees will then:
 - Resolve the ranked order of JRPs near the budget line – and others if required.
 - Formally agree and approve a single ranked list of JRPs
 - Approve the list of JRPs considered not suitable for funding

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Referees Comments



- Referees' comments should help those not recommended for funding understand why they were not funded.
 - we ask referees to concentrate the time available on those JRPs that received the lowest scores.
 - Referees' comments should assist EURAMET during contract negotiations

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Form 6c



EMPIR Call Process
Form 6c: JRP Evaluation

EURAMET

EMPIR Call		Conformity with the SRT objectives	Tick one
Proposal number		Fully conforms and addresses all the objectives	<input type="checkbox"/>
Total score	/15	Partially conforms & any deviation is specified (see criteria)	<input type="checkbox"/>
Total weighted score	/20	Does not conform, OR any deviation is NOT specified	<input type="checkbox"/>
Is the JRP suitable for financing?	Yes/No	Date of assessment	<input type="checkbox"/>
Does each participant have the necessary basic operational capacity to carry out their proposed activities?		If no, please add comments:	
Yes/No			

CRITERIA	ASPECTS TO CONSIDER		SCORES
	ASPECTS TO CONSIDER	REFEREE'S COMMENTS	
EXCELLENCE	<p>To the extent that the proposed work corresponds to the SRT:</p> <ul style="list-style-type: none"> Clarity and pertinence of the objectives Soundness of the context, and credibility of the proposed methodology Extent that the proposed work is beyond the state of the art, and demonstrates innovative concepts and approaches, new products, services or business and organisational models Appropriate combination of interdisciplinary approaches, and, where relevant, use of disruptive technology 		/5 Weighted /
	<p>The extent to which the outputs of the project contribute to the implementation of the SRT:</p> <ul style="list-style-type: none"> Enhancing innovation capacity, creating new career opportunities and strengthening the competitiveness and growth of companies Addressing issues related to climate change or the environment, or bring other important benefits for society <p>The quality of the proposed measures to:</p> <ul style="list-style-type: none"> Identify and disseminate the project results (including management of IP), and to manage research data when relevant Communicate the project activities to different target audiences Use the results to create research collaborations or activities in the real sector Use their results disseminated and assessed Are actively engaged Are able to assess the project's results 		/5 Weighted /
QUALITY AND IMPLEMENTATION	<p>Quality and effectiveness of the proposed work, including efforts with the resources assigned to carry out the work as well as their objectives and milestones</p> <p>Appropriateness of the management structures and procedures, including risk and innovation management</p> <p>Commitment of the participants within the consortium</p> <p>Appropriateness of the allocation of tasks, ensuring that all activities have a clear role and also cover all activities in the project to fulfil the SRT</p>		/5 Weighted /

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Instructions to referees




Due to the limited time EURAMET has between announcing the selection of projects and contract signature, opportunities for negotiation will be limited and

- Referees must evaluate each proposal as submitted and not on its potential if certain changes were to be made
- If referees identify shortcomings (other than minor ones and obvious clerical errors), they must reflect those in a lower score for the relevant criterion
- Referees only explain the shortcomings, and do not make recommendations i.e. do not suggest additional partners, additional work packages, resources cut...
- Proposals with significant weaknesses that prevent the project from achieving its objectives or with resources being seriously over-estimated must not receive above-threshold scores


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Common issues in proposals




- Organisations not listed under legal entity name
- Page limits ignored in Template 4
- DIs included as External Funded Partners where some of their work is within their area of designation
- Missing resource and cost data for partners, particularly unfunded partners in Template 5
- External partner declarations in Template 5 not completed or incorrect
- H2020 statements in Template 5 not completed
- Description or explanation of costs missing from Template 5
- PIC, Legal entity details, VAT numbers, Registration numbers, and bank details missing from Template 5
- Proposers unclear about their organisations' labour type
- Missing activity end dates in Template 4 BUT.....

NOTE: No longer any summary activity table



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Negotiating



ID	Task Name	2017												2018					
		J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J
1	Proposing	Proposing																	
7	Winning	Winning																	
12	Negotiating													Negotiating					
13	Contract Negotiation meetings													Contract Negotiation meetings					
14	preparation of contract documents													preparation of contract documents					
15	Delivering													Delivering					
29	Reporting													Reporting					

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Start Dates



- The EMPIR Committee expect all projects to start before the summer of 2018.
- Negotiation meetings between the MSU and successful coordinators are expected to be held from 2018-01-10 for TP FUN and TP IND, and from 2018-02-05 for TP Normative and TP Research Potential. This will involve successful proposers in significant work between January and April – at least as much as you have spent in preparing the proposals.
- SIPs do not have negotiation meetings and negotiations are usually conducted by email, probably after TP FUN and TP IND meetings have been completed.

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“Negotiation”



- “discussion aimed at reaching an agreement”
 - Please keep talking to your negotiator
 - There are some things they can’t change e.g. Liability
 - This is like negotiating with the Commission or your tax authorities - some things are just not part of the discussion
 - spot these quickly and don’t waste your time and ours.

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Overview – Contract Negotiation



- Starts with face-to-face meeting at coordinator's institution
- Follow-up actions - email exchange to finalise:
 - Scientific/Technical part - updating the protocol
 - Financial part - updating Project Administrative Data
 - Administrative/Legal part - Status of legal entities, ethics review, financial capacity checks
- Issuing of grant agreement documents by EURAMET
- Signing of grant agreement and consortium agreement

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Grant Agreement



- Core – see model on msu.euramet.org
- Annex 1 – Description of the action
- Annex 2 – Estimated budget for the action
- Annex 3 – Accession Forms
- Annex 4 – Model financial statements
- Annex 5 – Model for the certificate on the financial statements
- Annex 6 – Model for the certificate on the methodology
- Annex 7 – Model for the technical reports

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Consortium Agreement



- Agreed between all participants in the JRP on how to operate the project
- Cannot be in conflict with the grant agreement
- EURAMET is not party to the consortium agreement, it is not signed or approved by EURAMET
- Many IP terms that were in the EMRP Consortium Agreement are now part of the grant agreement
- Model at <http://msu.euramet.org/downloads/#contractual>

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Consortium Agreement



The following decisions shall be taken by the Committee of EURAMET NMIs and DIs:

- Proposal to change the coordinator
- Withdrawal of a party from the consortium and the approval of the settlement on the conditions of the withdrawal
- Suspension of the action implementation
- Termination of this consortium agreement.

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Letters of Agreement



- For collaborators:
 - Defines relationship to consortium, including Confidentiality and IPR
 - Defines activities in the field of research and regulates the exchange of information;
 - Signed by coordinator for the consortium and a representative of the collaborator;
 - The Letter of Agreement can be concluded at any time prior to the start of the involvement of the collaborator, but after the start of the JRP.

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Legal Entities



- EURAMET can and will only enter into contract with funded and unfunded partners which are legal entities that have registered with the Commission's Beneficiary Register (previously known as the URF) and have a Participant Identification Code (PIC).
- If the PIC is not validated by the Commission then EURAMET will undertake an equivalent process.
- All organisations participating in JRPs on a contractual basis will need to be identified in the respective grant agreements, protocol and budget workbook under their legal entity name.

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Legal Entities



- Only include those organisations that are likely to sign the grant agreement ie agree to the legal/contractual conditions – the grant agreement is non-negotiable.
- Ensure researchers, particularly in external organisations, get agreement from their legal department well before submission
 - model grant agreement and model consortium agreement are available on msu.euramet.org

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Financial Capacity



- All External Funded Partners (EFPs), whose financial viability is not guaranteed by their State, will have their Financial Capacity checked during negotiation.
- This is more demanding than the standard H2020 process as the Internal Funded Partners become liable for any EU money not repaid by the EFPs.
- Any EFP failing the Financial Capacity check will need to supply an acceptable financial guarantee before they can receive prefinancing. The costs of such a guarantee may be more than the value of the prefinancing – but they are an eligible cost.
- If an EFP does not provide a guarantee they will not receive prefinancing and are likely to not receive any funding until ~5 months after the midterm of the project.

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Publishable Summary



- The publishable summary is a pdf file on the EURAMET website giving the latest information on your project. It is reviewed at least every 9 months.
- The first version is required within a month of the project starting. Before that EURAMET will use text from Section B1.a in your proposal to inform the Commission and others about the selected projects.

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List 4 and 5



EMPIR Call Process
List 4: Checklist for Template 4
 Document: P-CALLIST-102 Version: 1.2
 Approved: EMSP Programme Manager 2017-06-08

EURAMET

This checklist supplements Guide 4: Writing Joint Research Projects (JRP) and Template 4 JRP protocol to purpose is to allow programme to review their completed JRP proposals and check that all necessary information is included prior to submission.

Overall checks	✓
Ensure you are using the latest version of Template 4, JRP protocol and that all mandatory sections have been completed	
Ensure all partners have a PIC and have been validated in the European Commission's Beneficiary Register (Beneficiary should be a UPR) or by EURAMET. This is particularly relevant for External Funded Partners and Unfunded Partners.	
Do NOT delete the automatic footer	
Co-funder administrations the first time they are used include a summary of them in an all abbreviations	
Photographs should NOT be included. Diagrams should only be included if ABSOLUTELY necessary and limited to one or two schematic diagrams in Section B	
List of references should ONLY be included in Sections E and G	
Names of individuals should ONLY be included in Section E	
Potential collaborators should ONLY be included in Section F	
This page includes the JRP number, short name, full title, registered start date, the coordinator's name and organisation. The data is consistent with the information in Template 4: Project Administrative Data	
Text lengths for Sections B1.a, B2.3, B2.4, B2.5, B2.6, B2.7 and B3.3 do not exceed the maximum limits	
Section A: Key Data	✓
Section A1: The Coordinator (and Chief Stakeholder for the 3 Co-Normative proposals) contact details (name, email, phone) are consistent with the information in Template 5: Project Administrative Data	
Section A2: Participant details, all partners are listed in the correct order (Coordinator, Internal Funded Partners, External Funded Partners, Unfunded Partners), with the correct names and are consistent with Template 5: Project Administrative Data (see list, 1a)	
Section A3: Financial summary table is consistent with Template 5: Project Administrative Data	
Section A4: The work package summary table is consistent with the information in Section C and Template 5: Project Administrative Data. Only one partner is shown as leading each WP (shown in bold)	
Section A5: If your JRP includes a Linked Third Party the following sentence is included under the work package summary table "Some of the JRP working on the JRP at XYZ are employed by the Linked Third Party XYZ. XYZ are provided in reports of labour resources under B1.a, B1.b, B1.c and B1.d. This resource is included in the table above, with the number of person months the Linked Third Party will provide to each WP"	
Section B1: Scientific and/or technical excellence	✓
Section B1a: Summaries sections B1.1, B1.4, and B1.6, is suitable for a non-specialist audience and includes any confidential material or JRT references	
Section B1b: The Scientific and Technical Excellence are clear and (where possible) quantitative. Each objective includes which work packages (WP) it relates to	
Section B1c: Any divergence from the JRT objectives is explained and the reasons for this explained	
Section B1d: A maximum of 10 deliverables are included, 6-8 technical deliverables plus a mandatory deliverable for impact and a mandatory deliverable for the completion of the project's reporting	

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 Phone: +49 89 28933300 Email: info@euramet.eu
 www.euramet.eu

EMPIR

EMPIR Call Process
List 5: Checklist for Template 5
 Document: P-CALLIST-104 Version: 1.2
 Approved: EMSP Programme Manager 2017-06-08

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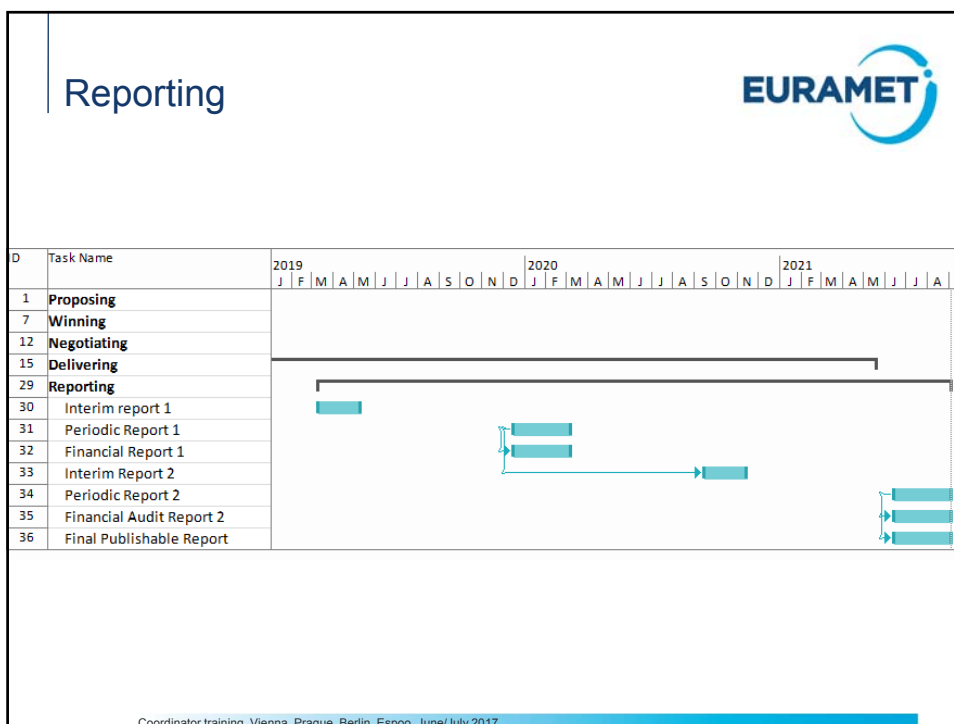
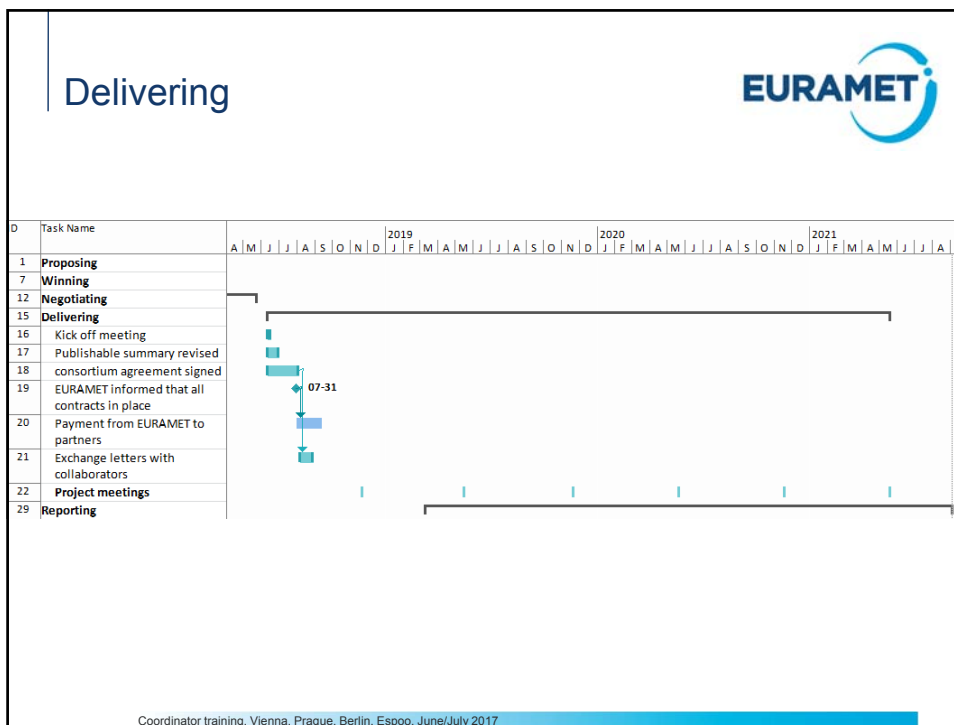
This checklist supplements Guide 5: Submitting administrative data for EMPIR Projects and Template 5: Project Administrative Data. Its purpose is to allow programme to review their completed Project Administrative Data workbook and check that all necessary information is included prior to submission.

Overall checks	✓
Ensure you are using the latest version of Template 5: Project Administrative Data and all worksheets, and printout, green and red tabs have been completed as required	
Top level data	✓
All green and yellow tabs have been completed on the 'Top Level data sheet'	
Section A: the following information has been included: <ul style="list-style-type: none"> project short name of max 13 characters including spaces in the 'short name proposed call' start date, which agrees with the proposed start date (must be the first day of a month) project duration, which agrees with the proposed project duration (must be an integer number of months) 	
Section C: related to 'K2020 objectives' has been completed for all 3 statements (private action, sustainable development and biodiversity)	
Section D: '% of the project related to documentary standards' has been completed	
Section E: has been completed for I2D and I1e a Co-Normative proposals ONLY	
Section F: has been completed and is correct	
Section G: has been completed and the statement as to whether the project will 'Optim' or 'Opt-out' of Data Management Reporting is consistent with section B2a of the proposal	
Section G: declarations have NOT been modified or deleted	
Participant data	✓
All green, yellow and blue tabs have been completed as appropriate	
All project participants have been included in the correct order and under the correct type (Internal Funded Partner, External Funded Partner, Unfunded Partner, Linked Third Party) on the Participant data sheet	
All partners have identified their labour methodology (actual, AI, average, ST) or daily SME owners not financing a start-up (C), and have included the correct costs in the correct currency (€, \$, P, £)	
Resources in a labour, T&L, other etc) have been included for all participants including Unfunded Partners. All costs are listed in the correct cost category	
Legal entity details and contact details for all participants have been included unless auto-populated	
Bank account information has been included for all Internal and External Funded partners, unless auto-populated	
Declarations (custom A2) have been completed for all External Funded Partners	
No Excel comments are included on the Participant data sheet. Do not include 'td' in any of the cells	
WP months data	✓
For each participant the months are assigned to the correct WPs	
Topics for each participant agree with the one below the main table and the overall 'unallocated' number is 0.0	

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JRP Reporting



- All projects have 2 formal reporting periods regardless of project duration
- For 36 month JRP formal reporting periods of 18 months (60 days to submit)
- Interim reporting every 9 months (45 days to submit)

Months	Report type	Period covered	Technical and Impact Reporting	Financial Reporting
9, 27	Interim	Previous 9 months	Yes	No
18, 36	Periodic	Previous 18 months	Yes	Yes
36	Final Public	Full 36 months	Yes	No

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Financial Audits




- a 'certificate on the financial statements' (drawn up in accordance with Annex 5) is required for each beneficiary [and for each linked third party], if it requests a total contribution of 325 k€ or more, as reimbursement of actual costs and unit costs calculated on the basis of its usual cost accounting practices (see Article 5.2 and Article 6.2, Point A)

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Reporting Guidelines




EMPIR Contracts - Reporting Guidelines
Part 0 - Guide to the parts
Document: P-CO79-Q3-100 Version: 1.1
Approved: EMPIR Programme Manager 2016-01-14




EMPIR Reporting Guidelines
Part 0 - Guide to the parts

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Questions?



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