



- Skills for the European
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Supporting



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# ADMINISTRATIVE PILLS FOR PARTICIPANTS

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Consortium GARR

September 21th, 2022



# Objectives & Tasks

- Internal communication
- Administrative and Financial Procedures
- Caveats
- Reporting best practices

# Outline

## ❖ INTERNAL COMMUNICATIONS :

- ❖ WORK PLACE, SLACK

- ❖ MAILING LISTS, CONTACTS

## ❖ REPORTING:

- ❖ INTERNAL & PERIODIC REPORTING TO EUROPEAN COMMISSION, FOCUS ON AFFILIATED ENTITIES

- ❖ Deliverable : production review and submission

- ❖ ACKNOWLEDGEMENT

- ❖ OPEN SCIENCE

# Internal communication and sharing

- General Assembly delegates-Technical Board
- Workplace
- Mailinglist, contacts
- Slack for direct and quick communication



# WORKPLACE

- By «Work Place» we mean a solution for:
  - Internal document sharing system
  - Activity tracking (ticketing system)
- We have chosen Only Office since it is a tool with a modest cost and certainly much cheaper than other tools you may be used to.
- Feel free to suggest something better or free with similar functionality.
- Direct link <https://workplace.skills4eosc.eu/>

# WORKPLACE General principles

By default, we would like to have everything open and accessible to anyone.

This is valid in general

- It is valid for the GA (General Assembly) minutes (with few possible extraordinary exceptions) for the Tech. Board minutes , for documents and minutes of the various WPs that must also be accessible to those who are not part of that WP.
- It is valid for the administrative / financial part:
  - a) only the Admin (and GA) contacts of each partner see their own cost details (e.g. the hourly cost of people)
  - b) everyone within the project will see the aggregate for any partner (fundamental for WP / Task leader, but in reality for anyone), i.e. the sum of the costs exposed, and the sum of the PMs reported in the various Tasks .



# E-mail main contacts

[coordinator@lists.skills4eosc.eu](mailto:coordinator@lists.skills4eosc.eu)

Is the Coordinator's 1st contact point for any queries related to management and finance:

Sonia Pistolato

Emma Lazzeri

The mailing list also includes GARR EP administration + international relations specialists to help with specific issues

[administrative@skills4eosc.eu](mailto:administrative@skills4eosc.eu)

Is the mailing list with at least one administrative contact for each Partner (no AE). Channel used for administrative, financial, legal matters. May be good idea to also include Partner representatives, to ensure proper communication flow.

[partners@skills4eosc.eu](mailto:partners@skills4eosc.eu)

This list is the union of all other list, including all contacts from all organisations involved in the project. You can subscribe to this list directly. GARR will include in this list all recipients that subscribed to at least one of the skills4eosc mailinglists.

([ga@skills4eosc.eu](mailto:ga@skills4eosc.eu)):

**General Assembly mailinglist** to subscribe to this list please send an email to [coordinator@skills4eosc.eu](mailto:coordinator@skills4eosc.eu) on behalf of your organisation. Only two members per beneficiary (not affiliated entities) can join the GA.

[info@skills4eosc.eu](mailto:info@skills4eosc.eu),

Info mailing list to be used by external users for requesting information. Only coordinator contacts (PM, Technical, administrative) will receive such emails, and they will possibly forward to relevant people

**Affiliated entities list:** GARR has created a specific mailing list only for the GARR AEs, we suggest the same approach.

Name	Purpose	Notes
<a href="mailto:WP1@skills4eosc.eu">WP1@skills4eosc.eu</a>	WP1 list	Everyone in the WP1, from any Task.
<a href="mailto:WP2@skills4eosc.eu">WP2@skills4eosc.eu</a>	WP2 list	Everyone in the WP2, from any Task.
<a href="mailto:WP3@skills4eosc.eu">WP3@skills4eosc.eu</a>	WP3 list	Everyone in the WP3, from any Task.
<a href="mailto:WP4@skills4eosc.eu">WP4@skills4eosc.eu</a>	WP4 list	Everyone in the WP4, from any Task.
<a href="mailto:WP5@skills4eosc.eu">WP5@skills4eosc.eu</a>	WP5 list	Everyone in the WP5, from any Task.
<a href="mailto:WP6@skills4eosc.eu">WP6@skills4eosc.eu</a>	WP6 list	Everyone in the WP6, from any Task.
<a href="mailto:WP7@skills4eosc.eu">WP7@skills4eosc.eu</a>	WP7 list	Everyone in the WP7, from any Task.
<a href="mailto:WP8@skills4eosc.eu">WP8@skills4eosc.eu</a>	WP8 list	Everyone in the WP8, from any Task.
<a href="mailto:ELSI-WP@skills4eosc.eu">ELSI-WP@skills4eosc.eu</a>	ELSI meta WP list	Everyone in the ELSI meta WP, from any Task.
<a href="mailto:VRT@skills4eosc.eu">VRT@skills4eosc.eu</a>	Consortium Virtual Round-tables	To be set up via nominations



# Work Package and Task leaders contacts

- Link to shared doc on workplace with WP and Task leader names

<https://workplace.skills4eosc.eu/Products/Files/DocEditor.aspx?fileid=957>

The file is «live», so continuously updated

AND NOW...LET'S SEE HOW TO REPORT COSTS!



# REQUIRED REPORTING

- ***Art. 7 GA : The coordinator must monitor that the action is implemented properly:***
  1. Technical monitoring : Technical Manager, Technical Board, General Assembly.
  2. Internal Quarterly financial reports for resources usage monitoring
- **Periodic reporting to European Commission**

# Internal Quarterly financial reports

**Partners will be asked by Coordinator to provide quarterly financial reports that will include also Affiliated Entities data**

Numbers need to be timely and as close as possible to the “true” numbers official EU Financial statement.

**Timing** : Reports Coordinator will consolidate the partner quarterly reports in a single spreadsheet providing only aggregated information.

have to be sent within one month after the quarter end

The **main objectives** are :

1. To check that the effort/budget consumption is in line with the expectations & address promptly any relevant deviations.
2. To monitor the Parties exposure in order to distribute the interim payments

# Periodic reporting to European Commission



- **DEFINITION**

Progress of the work and costs claimed

Report elaborated in order to receive payment.

- **WHEN** Periodic Reporting have to be submitted periodically, (schedule in GA)

			SUBMISSION	
PERIOD	FROM	TO	DEADLINE	LIKELY TIMING REVIEW
Y1	M1	M12	M14 (31.10.2023)	M15 (30.11.2023)
Y2	M13	M24	M26 (31.10.2024)	M27 (30.11.2024)
Y3	M25	M36	M38 (31.10.2025)	M39 (31.11.2025)

**WHAT** we need to provide :

1. Technical Report , Part A (structured tables), Part B (narrative part).
2. Financial Report structured as individual and consolidated Financial Statements, based on the Grant Management System.

- **WHO** : All participants should contribute to the parts, but it is the Coordinator who will have to submit them as a single report. Deadline for submission is 60 days after the end of each reporting period.

Following the acceptance by the Granting Authority, the Granting Authority approves the payment

Detailed deadlines will be circulated before the end of the periods.

[https://webgate.ec.europa.eu/funding-tenders-opportunities/pages/viewpage.action?pagelId=1867970#Reports&paymentrequests-Periodicreport:TechnicalReport\(PartAandB\)andFinancialReport](https://webgate.ec.europa.eu/funding-tenders-opportunities/pages/viewpage.action?pagelId=1867970#Reports&paymentrequests-Periodicreport:TechnicalReport(PartAandB)andFinancialReport)



## DELIVERABLES & MILESTONES

### Deliverable (Possible workflow )

Deliverable responsibility lies primarily within WP and its leader. Status is also monitored at Technical Board level.

- 60 days before submission deadline:
  - deliverable status is discussed at TB meetings, from this date until submission
  - Task/WP prepares deliverable, and performs internal (to the Task/WP) review
- 30 days before submission deadline
  - draft but complete deliverable is available
  - TB appoints 2 reviewers: these could/should be from different organisations and WPs than those preparing the deliverable.
  - Reviewers are given 1 full week to read and comment
  - Task has 1 full week to include comments
- 15 days before submission deadline
  - deliverable is ready and reviewed and is normally ready for submission
  - (otherwise... there is still some time left to fix things up)

Milestone workflow, in case milestone involves the preparation of a document, similar to Deliverable workflow, but TB may decide to drop the “external” review

# Focus on AFFILIATED ENTITIES


Article 187 (1)(b) of the EU Financial Regulation:

Entities *‘that have a link with the beneficiary, in particular a **legal or capital link**, which is neither limited to the action nor established for the sole purpose of its implementation’.*

**Affiliated entities in Horizon Europe = Linked third parties in Horizon 2020:**

(alignment of labelling/definition in the corporate context)

- Must be identified in GA in Article 8, their tasks must be mentioned in Annex 1 and their budget in Annex 2
- Same cost eligibility criteria than for beneficiaries

 They are therefore *de facto* treated like beneficiaries (*have their own financial statement, must provide their own CFS, must contribute to the technical report, must submit deliverables, etc*).

- The beneficiary remains responsible towards the granting authority for the work carried out by the affiliated entity.
- No direct channel from Coordinator to AEs, but AEs are welcome to use [info@skills4eosc.eu](mailto:info@skills4eosc.eu)
- Affiliated entity itself performs certain action tasks directly and is responsible for them towards the beneficiary.
- Affiliated entities do NOT have direct access to the Portal electronic exchange system. They therefore always need to go through their beneficiaries (to submit financial statements, contribute to the technical report, etc).

# Copy and paste Acknowledgement of EU funding

- Beneficiaries of EU funding must display the EU flag and funding statement ("Funded by the European Union" or "Co-funded by the European Union") in all their communication and dissemination activities and any infrastructure, equipment, vehicles, supplies or major result results funded by the grant.
- The EU flag and funding statement must be displayed in a way that is easily visible for the public and with sufficient prominence.
- EU funding must moreover be acknowledged in all types of public outputs (including patent applications, EU standardisation of results), media contacts and other public statements.
- The EU flag and funding statement are available in the Grant Agreement and on the Europa website.
- <https://webgate.ec.europa.eu/funding-tenders-opportunities/pages/viewpage.action?pageId=1867972>

# Acknowledgment and Disclaimer

- **Acknowledgment:** Skills4EOSC has received funding from the European Union's Horizon Europe research and innovation Programme under Grant Agreement No. 101058527.
- **Disclaimer:** "Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or [name of the granting authority]. Neither the European Union nor the granting authority can be held responsible for them."
- **Online funding statement generator:**  
[https://ec.europa.eu/regional\\_policy/online-generator/](https://ec.europa.eu/regional_policy/online-generator/)

To be updated to include the details  
of the UK funder and grant number!



# Open Science – Annex 5, art. 17 Grant Agreement

Open Science is an approach to the scientific process based on open cooperative work, tools and diffusing knowledge

Skills4EOSC is a project in the Open Science field so we aim the vast majority of its outcomes to adhere to the Open Science principles :)



# Looking for more information ?



- **GRANT AGREEMENT AVAILABLE IN EUROPEAN COMMISSION PORTAL**
  - Based on ANNOTATED MODEL GRANT AGREEMENT

[https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga_en.pdf)

- CE PORTAL On line manuals
- <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/manuals>

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Funded by  
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Skills4EOSC has received  
funding from the  
European Union's Horizon  
Europe research and  
innovation Programme  
under Grant Agreement  
No. 101058527.

## Thank you! Questions?

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