

White paper on Best Practices on Managing Complex and Multifaceted EU-funded Projects

M^a Belén Gómez

Table of Contents

White paper on Best Practices on Managing Complex and Multifaceted EU-funded Projects	1
Note from the Author	3
Abstract.....	3
1. Introduction	3
2. Operating Context	4
2.1. Legal Framework	4
2.2. Governance Structure.....	4
3. Scientific coordination	5
3.1. Monthly Internal Work Package Meetings	5
3.2. Monthly Scientific Meetings with Work Package Leaders	5
3.3. Biannual Consortium Meetings.....	6
3.4. Annual Doctoral Meetings	7
3.5. Internal Networks: Early-Stage Researchers	7
3.6. Cluster Relationships	7
4. Administrative Coordination	8
4.1. Planning and Execution.....	8
4.2. Support for Institutions new to EU Funding.....	8
4.3. Information Sharing	8
4.3.1. Management email.....	8
4.3.2. Mailing Lists	8
4.3.3. Information Sharing via Collaborative Platforms.....	9
5. Financial Control	10
5.1. Financial Management	10
5.2. Reporting and Compliance.....	10

5.2.1.	Internal reporting.....	10
5.2.2.	EC reporting.....	11
5.3.	Financial Monitoring	11
5.4.	Budget Redistribution Towards Project End	11
6.	Impact and Risk Management	12
6.1.	Impact Management.....	12
6.2.	Risk and Change Control.....	12
7.	Recommended Management Practices	12
7.1.	Common templates.....	12
7.2.	Project closure	13
8.	Recommendations	14
9.	Conclusion	14

Note from the Author

This paper draws on ten years of experience as a project manager of EU-funded projects across different institutions and consortia, complemented by earlier experience as a researcher in international research partnerships. The practices described here have been applied at various points across the projects managed by the author. Ideally, all these elements should be implemented in every project, subject to time and funding constraints.

Abstract

A Horizon Europe project is a research and innovation initiative financed partly or fully by the European Union, typically structured as a consortium of partners led by a coordinating organisation that serves as the primary interlocutor with the EU funding office. The terms of the funding are governed by a grant agreement signed by the coordinating institution and acceded to by all partners. Horizon Europe project management combines classical project controls with the legal, financial, and impact obligations embedded in that agreement.

Unlike many commercial projects, success depends not only on delivering outputs on time and within budget, but also on maintaining audit-ready records, coordinating a multi-beneficiary consortium, and demonstrating the dissemination and exploitation of results. This white paper outlines the operating model, key considerations, and practical management practices required to deliver Horizon Europe projects effectively.

1. Introduction

Horizon Europe is the European Union's hallmark funding programme for research and innovation, implemented through calls, proposals, and grant agreements managed via the Funding & Tenders Portal. Once funded, a project becomes a contractual commitment with formal requirements covering implementation, reporting, and result management. Project management in this context must therefore integrate scientific leadership, administrative discipline, and financial control from the outset.

2. Operating Context

A Horizon Europe consortium typically comprises multiple beneficiaries distributed across institutions and countries, with one partner serving as coordinator and primary contact point for the European Commission or the relevant executive agency. The coordinator is responsible for the overall flow of information, the submission of reports, and ensuring that the project adheres to the agreed work plan and budget. This structure makes internal governance a critical success factor.

The multicultural character of these consortia — with its associated language differences and geographical separation — enriches the project but also introduces a significant layer of complexity that must be addressed strategically.

2.1. Legal Framework

One of the first steps in project implementation is the signing of a consortium agreement among the project partners, covering fundamental aspects such as the responsibilities of each party, liability, governance, financial provisions, management of results, access rights, and confidentiality. Additional legal instruments — such as material transfer agreements, data transfer agreements, and service agreements, among others — should be put in place as required by the project's activities.

2.2. Governance Structure

A robust governance model should define decision rights, dispute resolution mechanisms, and a set of regular oversight bodies. One of the keys to successful EU project management is to approach governance as the operational system that drives the project towards its objectives, rather than as a set of routine meetings.

The main bodies that should be involved in a project are:

- **Project Coordinator & Management Team.** They work as interlocutor with the European Commission and the partner institutions. They steer the scientific work and control the administration and follow up.
- **Executive Board.** It is composed by the work package leaders, the project coordinator and the management team. It directs day-to-day operations, and monitors progress proposing corrective actions to the Steering Committee.
- **Steering Committee.** It is composed by one representative from each institution. Takes care of the operational management, oversight, decision making and strategy.
- **General Assembly.** Composed by all project-stakeholders. This is the higher decision-making body; it is formed by one representative from each partner organization.

- **Work Package (WP) Leaders:** They are in charge of the success of the tasks in their work package. They oversee the coordination of the scientific work in their WP among the institutions involved.
- **External Advisory Board:** External advisors are essential figures with relevant experience in the field that oversee the evolution of the project and provide feedback. Their role is also to make sure that the project outcomes are aligned with the proposal, its expected impact and societal needs.
- **Dissemination and exploitation committee:** They lead the impact and visibility of the project's outcomes. Their focus is outreach, communication and market uptake.

3. Scientific coordination

A proactive scientific coordination is the first step towards project success. Several mechanisms can support this goal. A clear and consistent meeting structure is the most direct of these. For meetings to be effective, however, they must be well organised, deliver relevant content to all participants, and actively reduce rather than add to participants' internal management responsibilities.

The recommended set of meetings includes monthly internal work package (WP) meetings, monthly WP leaders' meetings, and biannual general assembly meetings. Special attention should be paid to early-stage researchers, who typically form the main workforce of the project; supporting their networking and peer connections will have a direct positive effect on research output.

3.1. Monthly Internal Work Package Meetings

Each work package should hold at least one internal monthly meeting, chaired by the WP leader. This meeting will be attended by all the institutions involved in the WP and they will report on their progress and receive updates from the monthly scientific meetings with work package leaders.

3.2. Monthly Scientific Meetings with Work Package Leaders

A two-hour monthly meeting is one of the cornerstones of effective project coordination. These meetings serve not only as a forum for scientific exchange but also as an opportunity for researchers to build human connections and transform email contacts into working relationships. They also function as a natural and constructive reminder for overdue tasks.

It is essential that all WP leaders attend, even when their work package is not yet active or has already concluded, as these meetings provide the ideal occasion to clarify inter-WP dependencies and detect potential incompatibilities before outputs are transferred downstream. They are equally valuable for the communication

team, who can gather first-hand information suitable to become project dissemination and arrange follow-up conversations with WP leaders for further input to elaborate publishable news and other communication material.

The agenda should include at least the following items:

- Review of actions from the previous meeting
- Review of deliverables and milestones due in the following six months
- Review of risks
- General project management updates: status of any amendments, upcoming EU or internal scientific/financial report,...
- Coordinator news: collaboration opportunities, upcoming meetings, major developments affecting the project,...
- Progress summary from each WP leader
- General discussion

Minutes that detail the content of the meeting, agreed actions and responsible persons for them should be prepared and circulated to all attendees after each meeting.

Although these meetings may be perceived by some as an additional burden, they represent a highly effective investment of time: they reduce the effort spent on information exchange and prevent errors arising from misunderstood instructions, since any deviation will be identified promptly. Care should be taken to maintain a constructive and collegial atmosphere throughout.

3.3. Biannual Consortium Meetings

Two general consortium meetings per year are recommended. They should have a similar agenda to the monthly meetings. It is good practice to extend an invitation to the EU project officer to keep them informed of project progress and to allow them to provide any additional guidance to the consortium. The external advisors should also be invited to participate, allowing them to oversee the project's progress and provide advice to the consortium. Including an invited talk from an external expert in a related field, or from the coordinator of a comparable EU project, is an effective way to strengthen synergies and maximise the value of the funding.

- *In-person meeting* (one and a half to two days): Coffee breaks, lunches, and dinners offer valuable opportunities for informal interaction among partners and help build the working relationships that facilitate collaboration. The general assembly meeting should be followed by a closed steering committee session to critically review project progress, assess whether

corrective measures are needed, and address any major issues that may have arisen during the period.

- *Online meeting* (a few hours): The agenda can follow a similar structure to the in-person meeting, with time allocations adapted to the format and the volume of information to be conveyed.

Minutes of these meetings should be prepared and made accessible to the consortium, along with the presentations from the different WPs.

3.4. Annual Doctoral Meetings

An annual or biannual meeting at which early-stage researchers present their progress within the project provides a supportive environment in which they can develop their presentation skills and exchange experience with peers. Where possible, holding a joint session with early-stage researchers from a related project increases participation and broadens the exchange. The meeting can be held online if funding does not allow for an in-person event, though in-person meetings are more propitious to effective networking.

3.5. Internal Networks: Early-Stage Researchers

Establishing a direct communication channel for early-stage researchers — including doctoral students and postdoctoral fellows — enables them to exchange information rapidly without the need to route every query through their supervisors. This informal support network can have a meaningful positive effect on project progress. The channel can take the form of a group in a chat app or an online discussion forum, for example.

3.6. Cluster Relationships

The formation of clusters among projects addressing related research topics is a recommended practice that strengthens synergies, promotes information exchange, and increases the collective visibility and impact of the work.

To make this relationship productive, a regular meeting structure should be established to create opportunities for information exchange and collaboration. The content of these meetings should be planned deliberately to maximise their impact.

A practical approach is to organise the cluster's areas of interest into thematic working groups, following a structure similar to the work packages of a research project. Defining specific objectives and a regular meeting format for each working group helps focus discussions, improve coordination, and optimise collaboration across the cluster.

4. Administrative Coordination

4.1. Planning and Execution

Horizon Europe projects are typically structured into work packages with defined deliverables, milestones, responsibilities, and timelines. This provides the project managers with a first framework for planning and monitoring. Effective execution requires translating the proposal into a realistic delivery plan that includes resource allocation, internal deadlines, document ownership, and review gates for critical outputs. Given that collaborative research and innovation projects frequently evolve during implementation, the plan must be both disciplined and adaptable.

The project should maintain a live register of deliverables, milestones, risks, and dependencies so that the project manager can identify issues before they affect reporting or payments.

4.2. Support for Institutions new to EU Funding

Institutions with limited prior experience of EU-funded projects require additional attention and follow-up. This is particularly relevant for non-EU institutions since they may not be familiar with the reporting and audit processes for public funding. Beyond distributing the grant agreement to all partners, it is good practice to organise a dedicated meeting with the administrative teams of these institutions to walk them through the reporting requirements and the documentation they will need to retain in the event of an audit. Periodic check-ins are advisable to identify any significant errors early and — critically — to ensure that staff turnover does not result in new team members being unaware of the applicable funding rules.

4.3. Information Sharing

4.3.1. Management email

Communication with consortium partners should ideally be managed through a dedicated institutional email address bearing the project name. This approach makes it easy for partners to identify the origin of messages and to remember the contact address. It also allows multiple members of the project management team to access the inbox, ensuring continuity in the event of a temporary transfer of management responsibilities.

4.3.2. Mailing Lists

Differentiated mailing lists should be established for different purposes (e.g. different boards, WPs, senior/junior researchers, management and administrative staff) to ensure that communications reach the right audiences efficiently and that partners are not overloaded with information irrelevant to their work.

4.3.3. Information Sharing via Collaborative Platforms

A secure, password-protected, and easily accessible document management system must be established at the outset of the project to share information across the consortium, ensuring that all partners have access to up-to-date project documentation, meeting materials, and relevant updates in a timely manner.

The system should include the following folders with the following information at least:

- Work Packages
- General legal documents (proposal and evaluation report, grant agreement and amendments, consortium agreement, material/data transfer agreements, service agreements, etc.)
- Communication materials (banners, roll-ups, infographics, leaflets, etc.)
- Templates (for deliverables, presentations, letters, videoconference backgrounds, logos, etc.)
- Meetings (agendas, minutes, presentations, etc.)
- EU reporting (technical reports, financial reports, review meeting presentations, review reports)
- Internal reporting (internal technical reports)
- Deliverables
- Contact lists

Sensitive information or documents in progress should be kept separate.

The system should also incorporate a shared calendar indicating all project events: monthly, WP, and annual meetings; deliverable deadlines; and reporting (internal/external) deadlines. Where possible, automated reminders for these deadlines should be configured.

The use of collaborative online documents is strongly recommended for the preparation of shared outputs such as deliverables and technical reports, as it eliminates the consolidation effort that typically introduces errors and version confusion.

5. Financial Control

5.1. Financial Management

Financial management is one of the most sensitive aspects of Horizon Europe delivery, as costs must be eligible, documented, and traceable in accordance with the grant agreement rules.

For real-cost projects, each institution is responsible for documenting properly their expenditure and making sure they are eligible. Among others, they should maintain clear time-recording practices (e.g. timesheets), contracts (staff, services, ...), proofs for best value, justification for travels and general cost tracking as detailed in the project's Grant Agreement.

A well-established financial control process reduces the risk of rejected costs, delayed reimbursements, and avoidable audit findings.

5.2. Reporting and Compliance

Each EU project is subject to at least two periodic reporting cycles, typically occurring every 12 to 18 months depending on the specific programme requirements. Periodic reporting is both a legal obligation and an operational checkpoint that conditions payments and triggers performance reviews. Reports generally combine technical progress, deliverable status, declaration of deviations, financial statements, and justification of work completed.

5.2.1. Internal reporting

Regular reconciliation between internal accounting and formal financial claims is essential, as it helps partners identify potential issues well in advance and reduces last-minute corrections and pressure across the consortium. Accordingly, deadlines for internal reporting should be established around six months before the EC reporting deadline. This internal reporting consists of a mock financial report covering the same aspects as the actual EC report. The outcome should be submitted to the project manager, who will assess whether any internal budget transfers may be needed.

This exercise requires each partner to review their expenditure pace and documentation well in advance of the EC deadline and allows time for any corrections that may be needed. It also brings forward preparatory work towards the EC report.

The internal reporting also includes a mock technical report that serves as a checkpoint and provides a solid basis for the official EC technical report.

5.2.2. EC reporting

The project manager should inform the consortium several months before the end of the reporting period to ensure that all partners have sufficient time to prepare their contributions. Each beneficiary should prepare its financial report and keep the continuous reporting section up to date throughout the reporting period.

In parallel, each work package leader should coordinate the contribution of their WP to the technical report.

An internal deadline should be established well in advance of the official submission deadline. This should provide sufficient time to address incomplete or delayed contributions from partners and to allow the coordination team to review and integrate all inputs.

The coordination team finalises the preparation of the technical report by reviewing, harmonising, and consolidating the contributions received from the different work packages. It should also oversee the financial reports submitted by the beneficiaries and compile the final reporting package for submission within the deadline.

5.3. Financial Monitoring

Throughout each reporting period, the coordinator should track the funds and person-months spent by each institution and compare these figures with the allocated budgets and against the time elapsed in the project. This provides a rough but useful indicator of whether resources are being consumed at the expected pace and whether project progress is on track. This should be adjusted for the periods during which each institution is non active.

5.4. Budget Redistribution Towards Project End

Before the final year of the project, a comprehensive review of expenditure per institution should be carried out alongside a projection of the funds each partner will require to complete their remaining activities. This gives the coordinator a clear view of which tasks have been over-resourced, and which are under-resourced, enabling the necessary budget transfers to ensure that all tasks can be completed on time.

Although budget transfers that do not originate from modifications of the scientific work may not formally require an amendment to the grant agreement, some institutions prefer to have such changes reflected in their contractual documentation to avoid misunderstandings with their own administration or auditors.

6. Impact and Risk Management

6.1. Impact Management

Dissemination, communication and exploitation are mandatory components of Horizon Europe project design and implementation, as they are central to the creation of impact. Dissemination focuses on sharing results with the communities best positioned to use them, while exploitation concerns the development of products, processes, services, policies, or other applications based on project outcomes. Communication is a strategic, continuous process aimed at promoting the project and its results to a broad, non-specialist audience, including the general public and media in order to raise awareness. A strong impact strategy should define audiences, channels, messages, and timing, and should be revised as results develop.

A diverse range of communication channels should be targeted, including the project website, general press, specialised academic journals, science dissemination workshops, open days, and a variety of social media platforms. Formats should also be varied — written news, infographics, podcasts, video interviews, and video monographs — to reach the widest possible audience.

6.2. Risk and Change Control

Horizon Europe projects are exposed to a range of risks including technical uncertainty, partner delays, staff turnover, procurement challenges, and scope changes. Risk management must therefore be a continuous activity. Each significant risk should have a named owner, defined mitigation actions, and early-warning indicators so that the consortium can act before a problem becomes reportable. When changes affect scope, contractual obligations, or task subcontracting, the coordinator must inform the EU in case a formal amendment procedure is required.

7. Recommended Management Practices

7.1. Common templates

In institutions where several projects are expected to be funded by the same funding body, it is recommended to develop a set of common templates that can be adapted to the specific requirements of each project. This helps establish a consistent

management approach across projects, while reducing duplication of effort and ensuring that key information is collected and monitored in a standardised manner.

Examples of templates that can be developed include:

- Consortium financial monitoring spreadsheet
- Institutional financial monitoring spreadsheet
- Deliverables status and tracking spreadsheet
- Payment status tracking spreadsheet
- Continuous reporting data spreadsheet
- Gantt chart and project timeline
- Meeting agenda template
- Meeting minutes template
- Timesheet template
- Annotated technical report template
- Deliverable template
- Presentation template

These templates should be designed with sufficient flexibility to accommodate project-specific requirements while maintaining a common structure and terminology across the institution's project portfolio.

7.2. Project closure

Throughout the execution of a project, significant issues, challenges, and deviations from the original plan should be systematically recorded, together with the actions taken to address them and their outcomes. Maintaining this record provides a valuable source of information for identifying recurring issues, assessing the effectiveness of the measures adopted, and improving project management practices.

At the end of the project, this information should be consolidated into a lessons learned document. The document should capture the main challenges encountered, successful practices, areas for improvement, and recommendations for future projects.

The lessons learned should be reviewed at the beginning of subsequent projects, particularly during the planning and management strategy definition stages. This will help the project team anticipate potential difficulties, build on previous experience, avoid repeating mistakes, and optimise the management approach from the outset.

8. Recommendations summary

The following practices have been shown to materially improve performance in Horizon Europe consortia:

- Define governance, roles, and approval rights at project start.
- Build an integrated plan covering deliverables, milestones, finances, and reporting.
- Design a comprehensive structure for regular meetings within the consortium at different levels.
- Review risks, changes, and dependencies on a monthly basis.
- Maintain audit-ready financial evidence and time records from day one.
- Treat dissemination and exploitation as active workstreams, not as end-of-project tasks.

9. Conclusion

Horizon Europe projects succeed when project management is treated as a strategic capability rather than a purely administrative requirement. The strongest consortia align governance, compliance, financial control, reporting, and impact management into a single integrated operating model that supports both scientific delivery and contractual accountability. In such an environment, the coordinator's role shifts from chasing documents to enabling focused, transparent, and high-impact collaboration.