This project is co-financed by the
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finanse edilmektedir

TURKEY in HORIZON 2020
COOPERATION, INNOVATION, COMPETITIVENESS

Technical Assistance for Turkey in Horizon 2020 Phase-II
EuropeAid/139098/IH/SER/TR

Turkey in Horizon 2020 II

FGT Health

Proposal writing as a project: how to organize time and resources

Grigoris Chatzikostas

Training Coordinator

REPUBLIC OF TURKEY
MINISTRY OF INDUSTRY
AND TECHNOLOGY

COMPETITIVE SECTORS PROGRAMME

TÜBİTAK

Grigoris Chatzikostas

Training Coordinator in ”Turkey in Horizon 2020 – Phase II” project

Managing multi-national and cross-sectoral consortia, **writing proposals for EU funding and coordinating large-scale projects** that promote tech-enabled entrepreneurship in various sectors such as agrifood, ICT, environment, health, manufacturing, entrepreneurship etc.

Training, coaching, mentoring and supporting researchers and innovation actors on issues related to proposal writing for EU funding opportunities, project management of EU funded projects, IPR management and entrepreneurship, in countries such as Greece, Serbia, Turkey, Tunisia, Poland etc

15yrs

Experience in EU projects

1st position in Serbia in attracting H2020 funds

100+ m€

Total value of projects managed

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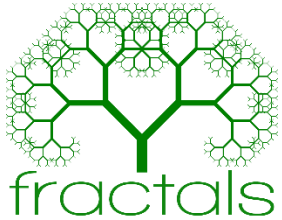
Projects (indicative)



NETWORK OF DIGITAL INNOVATION HUBS IN ROBOTICS

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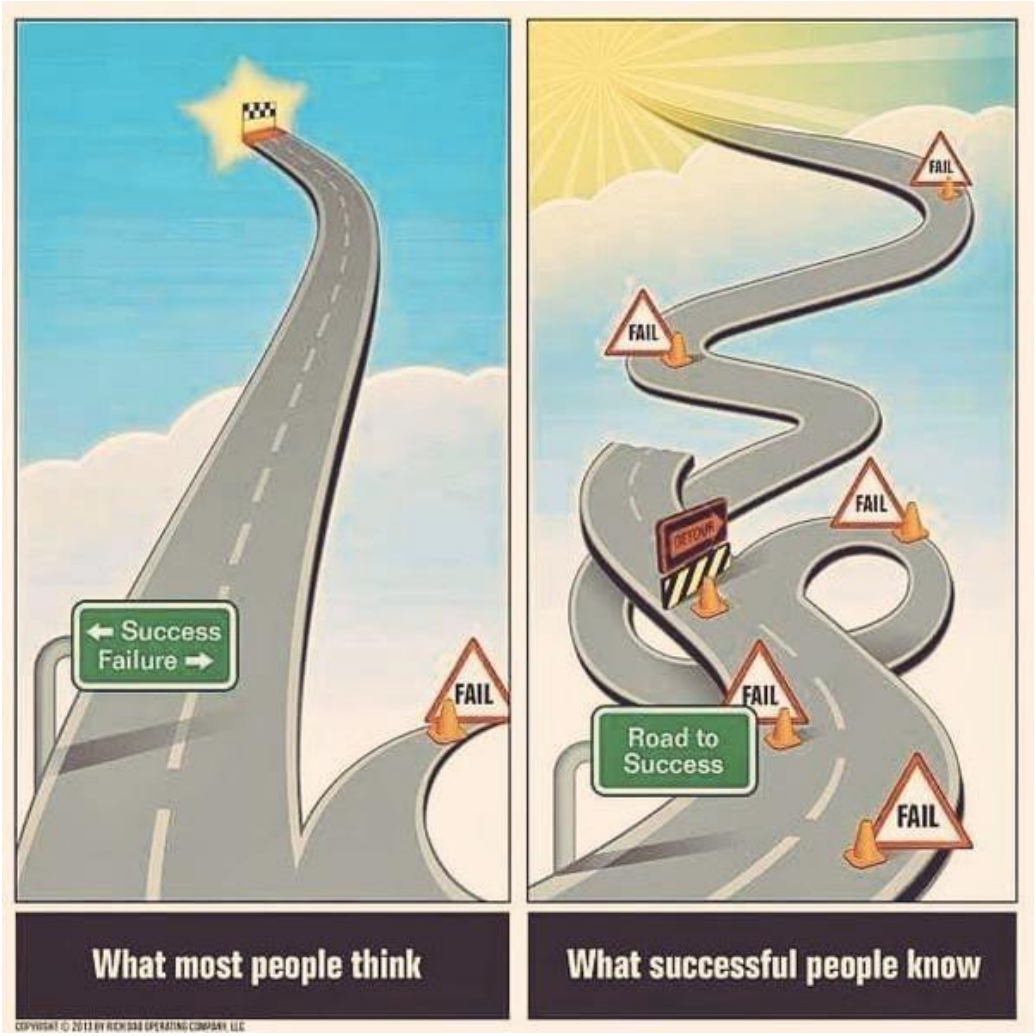
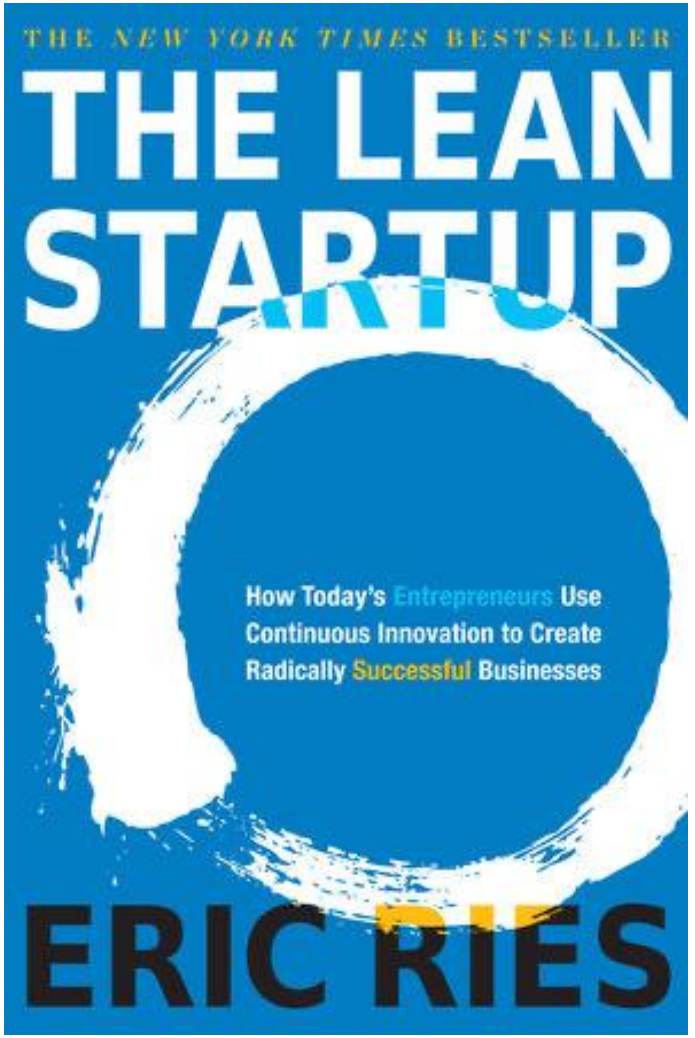
AND TECHNOLOGY

Main aims of the session

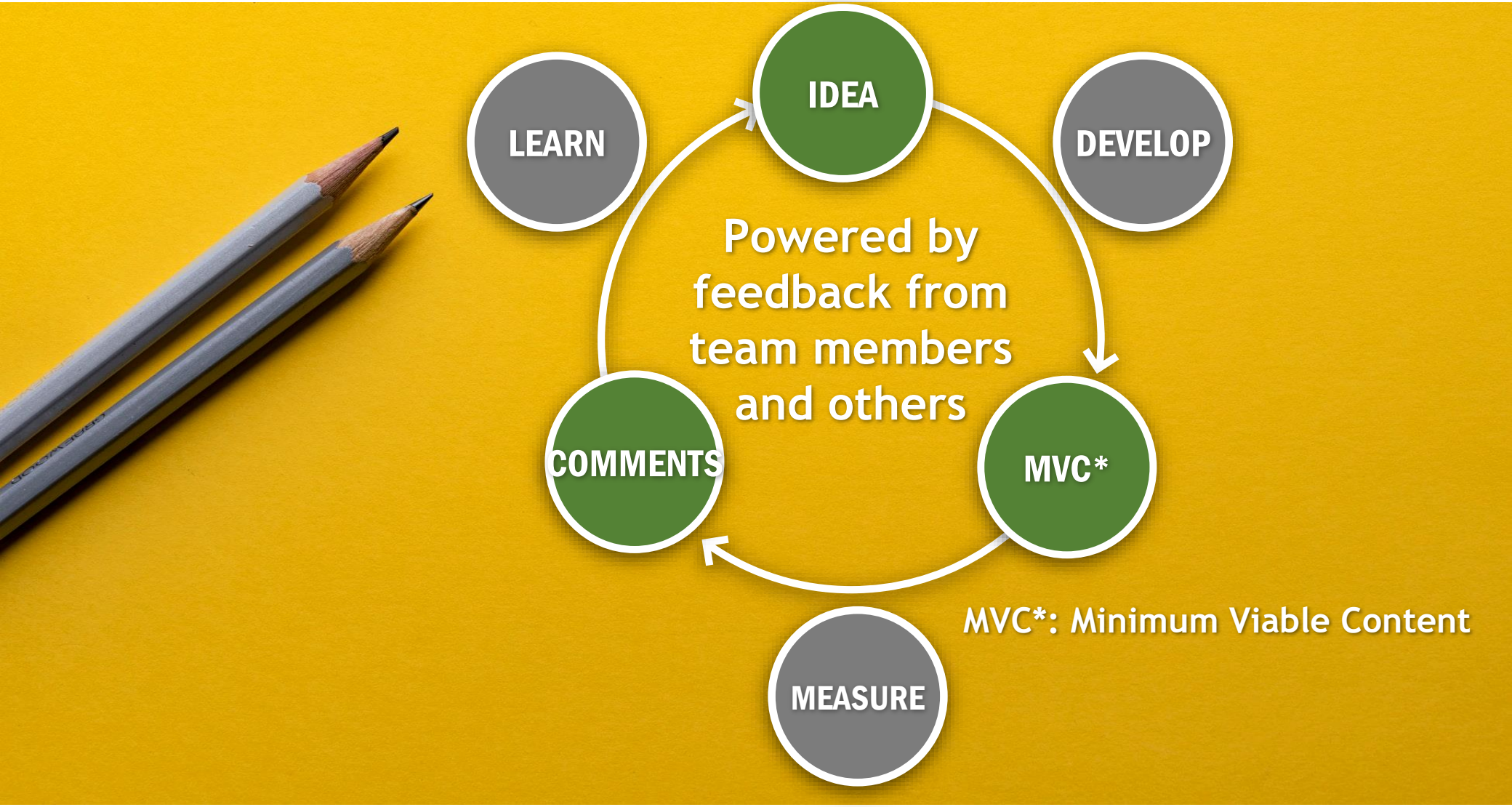
1. To present the development of a H2020 proposal as a project management assignment
2. To introduce the “Lean” approach to proposal writing
3. To guide participants through 11+1 steps for management of proposal writing

Lean approach to proposal writing

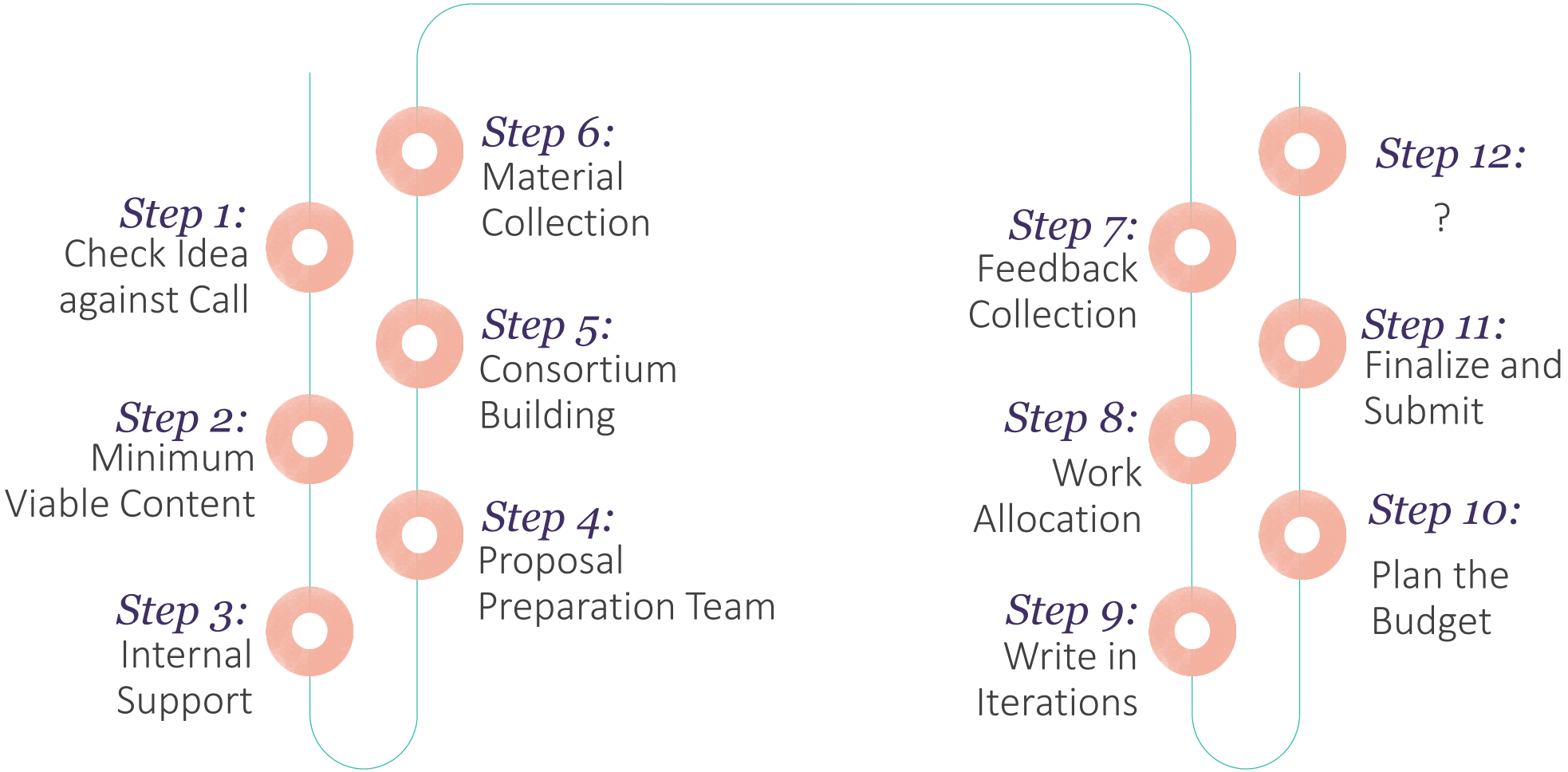




Lean approach to proposal writing



11+1 Steps for Management of Proposal Writing



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Step 1: Check Idea against Call

Relevance

What are you trying to do? Is it exactly what the call asks? Did you check every word? Is there something you don't understand? Did you check the FAQ section?

Available Budget

How many projects are going to be funded? Expected project budget?

Competition

Previous relevant projects? Key players?

Don't even start preparing a proposal without satisfactory answers to the above questions! It will be a waste of time and resources…

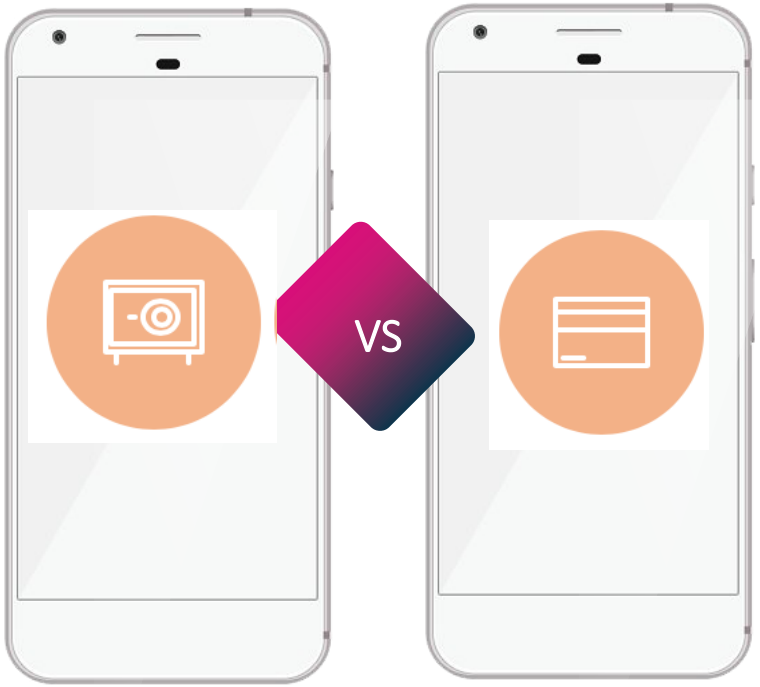
Step 2: Minimum Viable Content

“ The Minimum Viable Content (MVC) is a **strategy** used for fast and simultaneous testing of a proposal idea. It is an iterative process of idea generation, presentation, feedback collection, analysis and learning.

Pitch Presentation

- Easier than writing when you
- don’t have everything clear yet
- Visual content helps for describing to the others
- Especially helpful when it’s a multidisciplinary project and your partners have various backgrounds

Works better in live meetings or telcos



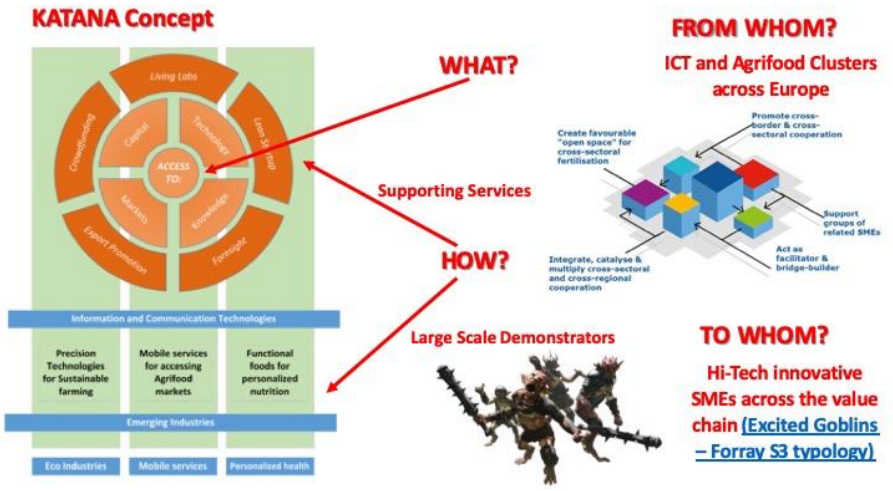
Concept Note

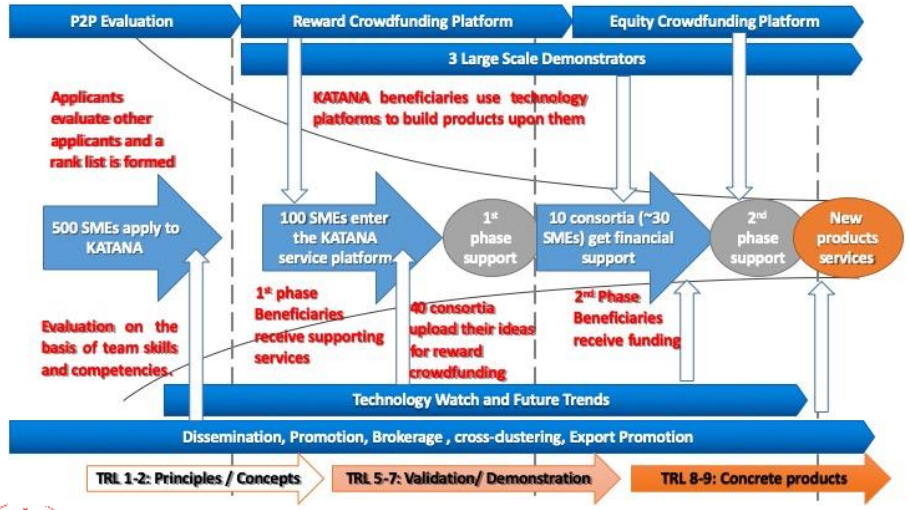
- Better for receiving concrete feedback
- More appealing to official settings and partners with whom you work for the first time

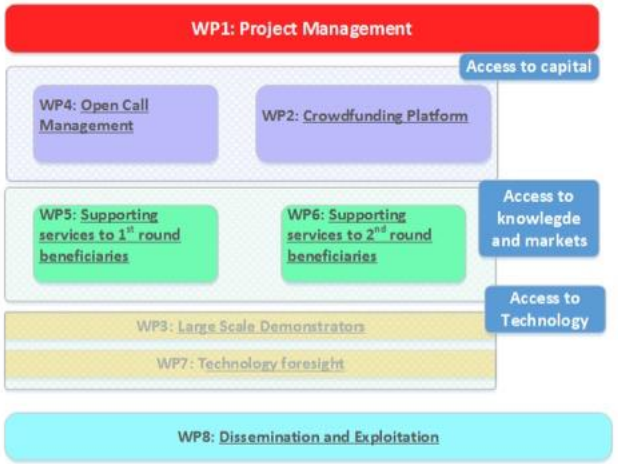
Works better in email communication

Step 2: Minimum Viable Content

Pitch Presentation







KATANA Proposed partners' roles

Partner	Type	Country	Work Packages							
			WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8
bwcon	ICT	DE	X				X	X	X	X
AgroBusiness Park	ICT, Agrifood	DK					X	X	X	X
EFFOST	Agrifood	NL					X	X	X	X
Food +I	Agrifood	ES					X	X	X	X
VOICT	ICT	SRB					X	X	X	X
Organic Products Cluster	Agrifood	GR					X	X	X	X
Polo TP	ICT, Agrifood	IT					X	X	X	X
BioSense UNS	ICT, RTD	SRB		X		X			X	X
CrowdAhead	Crowdfunding	UK		X		X				X
KPAD	Agrifood	UK			X				X	X
InoSens	ICT, Agrifood	SRB			X				X	X
Mobile apps SME?	ICT	?			X				X	X

X: WP Leader X: WP Participant

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Step 2: Minimum Viable Content

Concept Note

	FRACTALS Future Internet Enabled Agricultural Applications in Balkans	

A. General information

Call identifier: FP7-2013-ICT-FI
Publication date: 28 June 2013
Deadline: 10 December 2013 at 17:00:00 (Brussels local time)
Call topic: FI.ICT-2013.1.8 Expansion of Use Case
Funding Scheme: CP-CSA
Special Requirements: At least 80% of the project budget should be reserved for open calls for SMEs and web-entrepreneurs.
EC contact person: Arian Zwegers, Arian.Zwegers@ec.europa.eu, +(32) 229 84424

B. Background

1. The overall goal of the Future Internet Public-Private Partnership (FI-PPP) programme is to place Europe in a better position towards capturing the opportunities, in terms of both economic growth and well-being that will arise as a result of further digitalization in a number of economy sectors. Phase 1 and Phase 2 of the FI-PPP initiative have materialized, tested and validated significant investments in infrastructures such as Generic Enablers (GEs) and Specific Enablers (SEs, in a wide range of application domains including manufacturing, health, content, energy, transport, logistics, and agri-food and have involved a wide spectrum of actors and stakeholders, both ICT and non-ICT. The purpose of Phase 3 is to capitalize on the abovementioned investments and developments by supporting ICT SMEs and Web entrepreneurs in exploiting those investments and developing value added applications.

2. Smart farming systems based on ICTs are expected to play an important role in improving farming activities. During the past years, sophisticated farm management systems have emerged to replace outdated complex and monolithic farm systems and software tools. The latest trend is to enable these management systems to operate over the Internet. However, the Internet, in its current operation form, faces a number of shortcomings especially in handling vast numbers of networked devices (i.e., Internet of Things) or allowing a simplified integration of systems and services developed by different players (Kaloxylos et al, 2012).

C. Proposed project

Tentative Title: Future Internet Enabled Agricultural Applications in Balkans

Tentative Acronym: FRACTALS

FRACTALS envisions to support the community of innovative ICT SMEs and Web Entrepreneurs of Balkan countries to harvest the benefits of FI infrastructure, by developing applications with high market potential, addressing the needs of the regional agricultural sector. This support is going to be multi-dimensional in the sense that it aims to span beyond grant assistance to also include the mapping of end-users (farmers) needs, the technical capacity building of ICT SMEs and web entrepreneurs with respect to developing applications based on FI infrastructures and the testing and validation of applications in an open innovation context (by involving end users in the testing/ validation assignment through a Living Labs environment)

Objectives:

- To identify the needs and challenges of the agricultural sector in Balkans, through an extensive problem sourcing campaign, taking into account the insights from farmers.
- To frame a strategy for addressing those needs challenges through ICTs in general and FI technologies in particular
- To issue and effectively manage the full cycle of an open call addressed to ICT SMEs and Web Entrepreneurs of the Balkans region, under principals of equal treatment, transparency and fast delivery of quality services
- To widely disseminate the call to the respective entrepreneurial communities, ensuring a broad participation of potential beneficiaries and a high quality of proposed projects
- To train and support successful grant candidates in a wide spectrum of fields, from the incorporation of FI infrastructures (created during phases 1&2 of FI PPP) to the interaction with users
- To provide a framework (Living Lab) where developers will interact with end users (farmers) during testing and validation of the applications
- To encourage beneficiaries in developing synergies and offer complimentary services based upon the developed applications across the entire value chain of agricultural ICTs
- To maximize the capitalization and visibility of FI infrastructure in the Balkans region and connect the SMEs eco-system with the European FI community

Step 3: Internal Support

Compliance with the R&I agenda of your organization

Approval of hierarchy (official procedure might be needed)

Support from other colleagues and internal supporting structures (if any)

Make sure ON TIME that you will have support internally BEFORE starting to prepare the proposal and contact partners to save time and resources and protect your credibility in the network

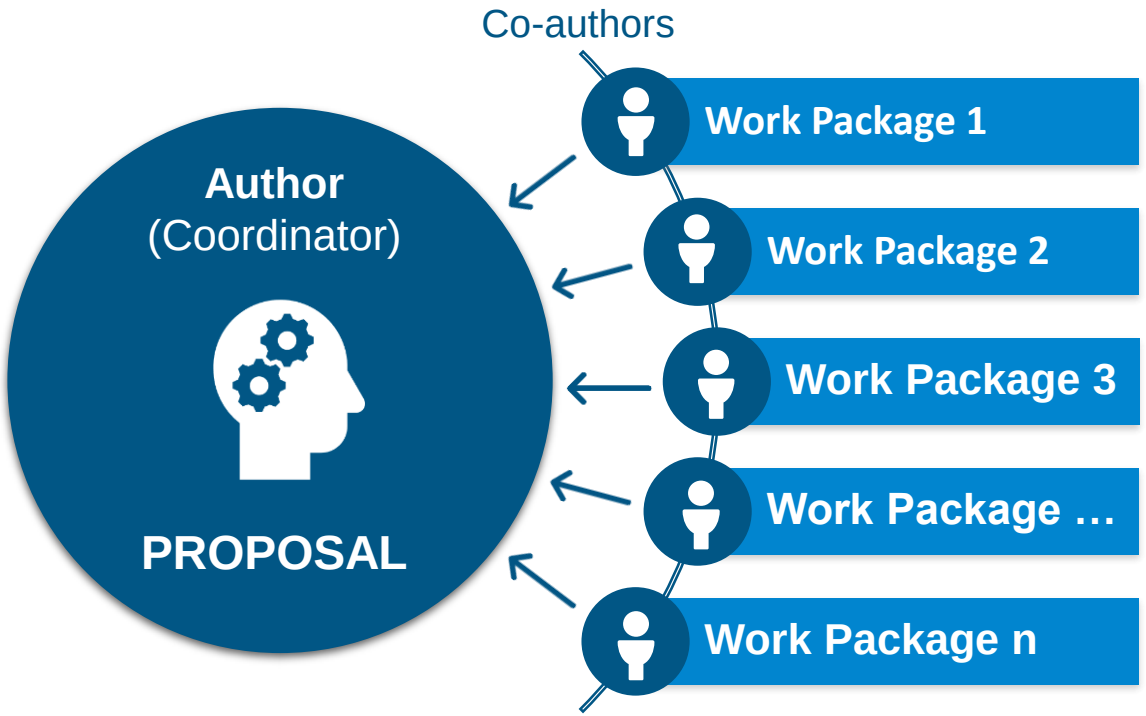
Step 4: Proposal Preparation Team

“ The ideal proposal writing team needs a person that:

- Has comprehensive **technical understanding**
- Is very fluent and accurate in **English**
- Has ability to **think** through detail and spot problems
- Has great **imagination** and ability to see opportunities

…BUT ALSO -and most important- someone* who *can lead, motivate, coordinate and monitor all the above, dealing (very often) with conflicting agendas in a fair and effective way

Step 4: Proposal Preparation Team



Tips to ENGAGE people:

- ✓ Assign roles and provide leadership in WP leaders
- ✓ Engage as many organizations/ people as possible
- ✓ Balance with internal and external team members

Step 5: Consortium building

Previous collaboration and Friendship

It is ALWAYS good to work with people you already know and trust
BUT! **Avoid inviting people just because they are your friends**…
They must fit and add value to the project

Big and successful stakeholders AKA “Big sharks”

Sometimes it is necessary to include key players or “big” names
BUT! Keep in mind that those partners may try to take advantage of you and the rest of the consortium…

Value chain and geographical coverage

Make sure that your consortium **captures the entire value chain** as required by the call and has sufficient geographical coverage
BUT! **Don’t involve partners just because they come from high profile countries**…

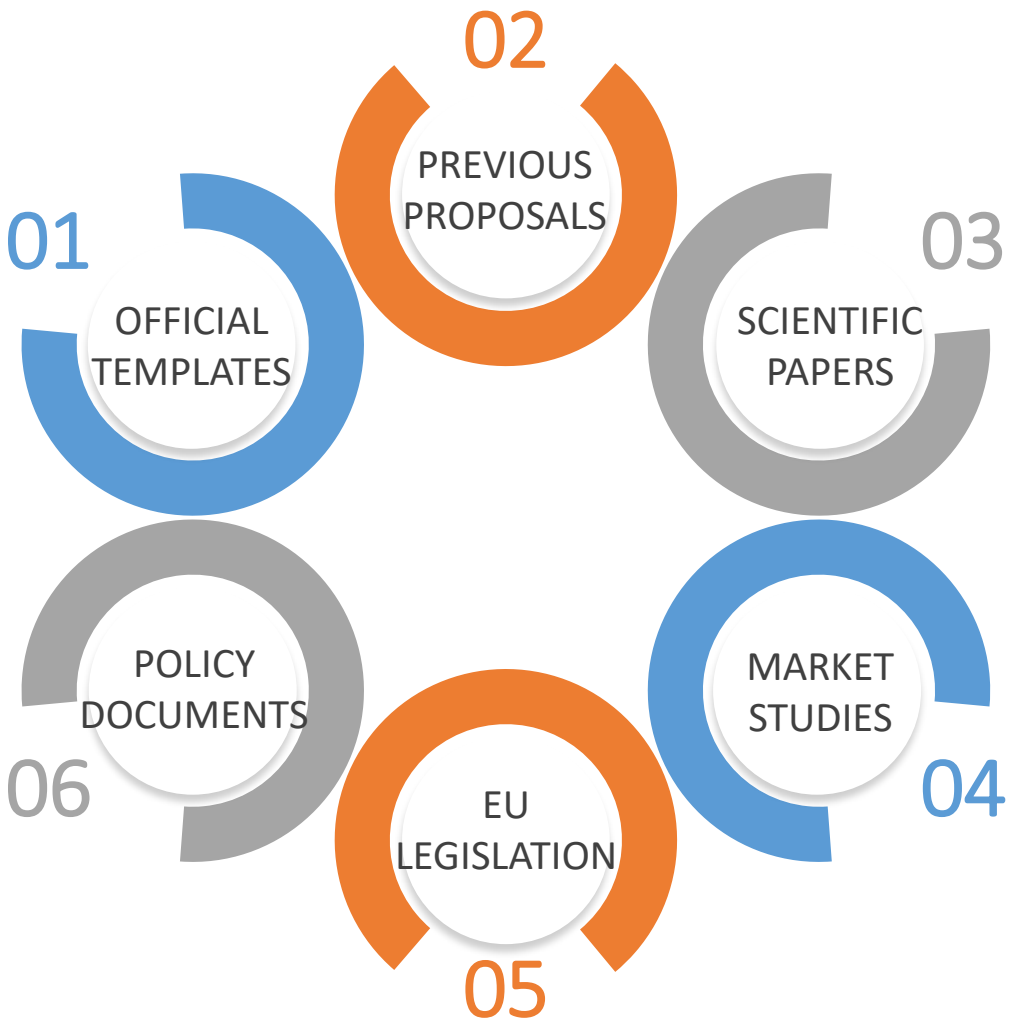
Step 5: Consortium building

Find the right people … to work with for the next 2-4 years

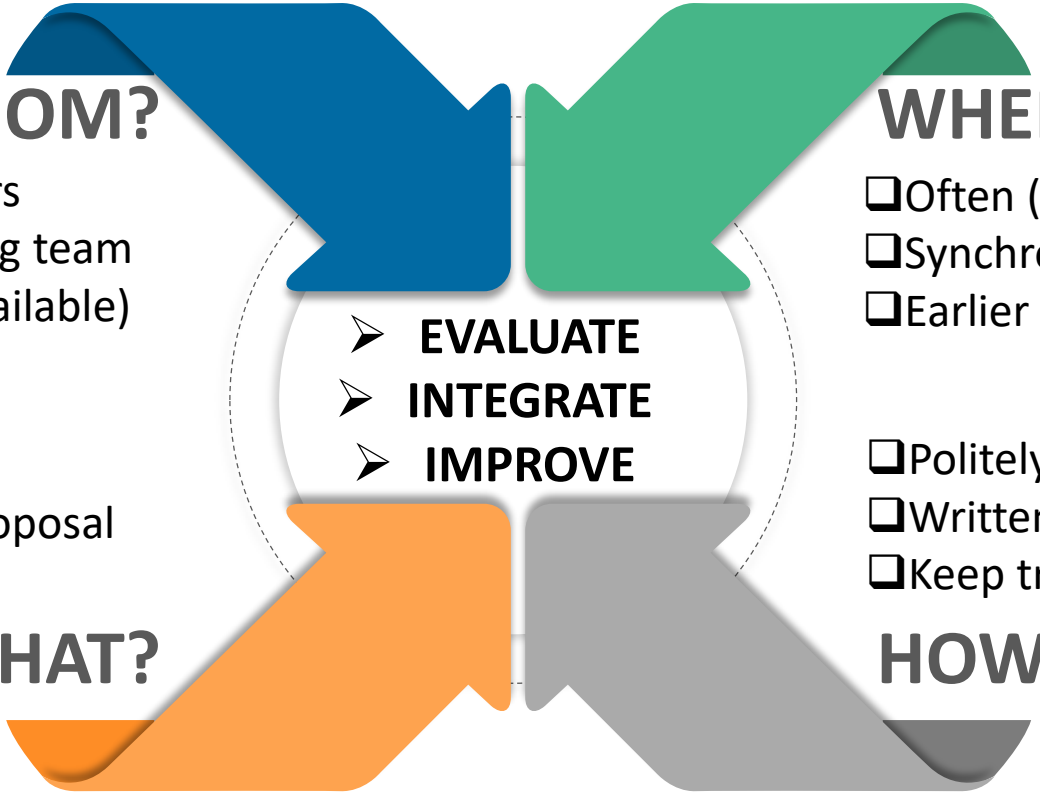
Step 6: Material Collection

Background material database will help proposal writing team to save time and develop content in an effective and credible way.

- ❑ Collect only relevant and useful material
- ❑ Engage everyone in the team, provide access and ask for contribution
- ❑ Save for future use



Step 7: Feedback collection



Step 7: Feedback collection (Proposal)

Figure 5 shows the development stages and main peceултс which will be acomplished in each of them. It also outlines the main outputs from Phase 1 of GATE project.

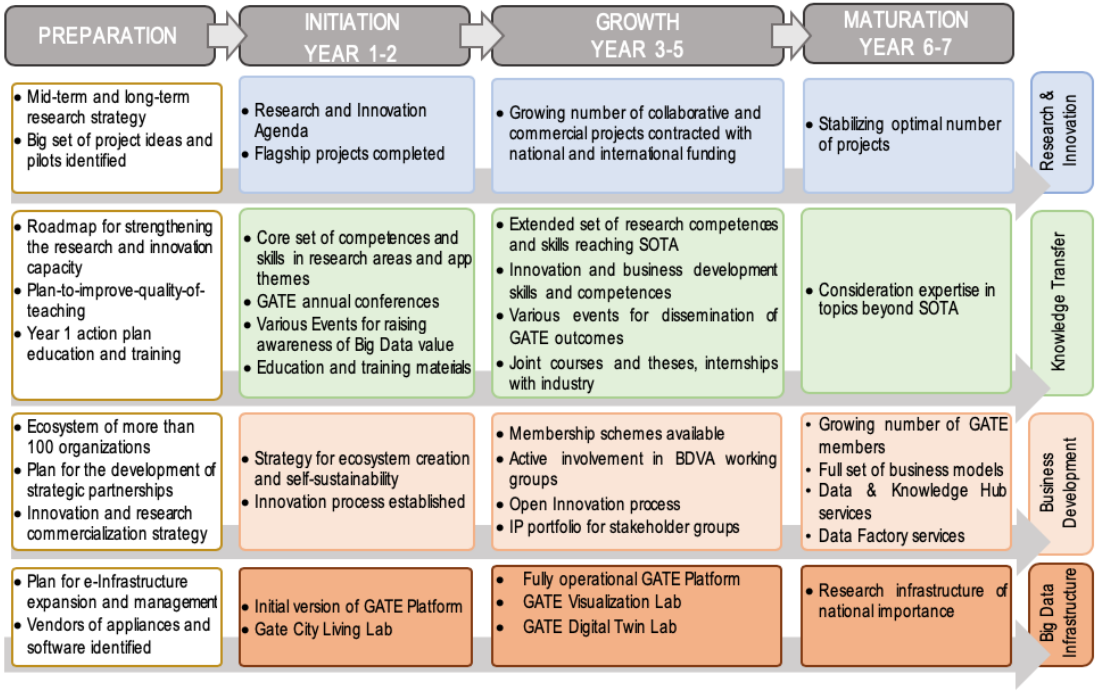


Figure 5 GATE Methodology

The main CoE research, innovation, business and operation strategies, as well as Year 1 concrete Action Plans, have been elaborated during GATE Teaming Phase 1 which enables fast and targeted start-up of the activities in Phase 2. In addition, vendors of appliances and software have been identified to ensure shorter procedure for setting-up the infrastructure enabling research, innovation and education activities. They are also committed to supply for free the main technologies to serve as basis of the platform and the Labs. A number of pilot projects have been identified and negotiated with respective stakeholders and will become GATE flagships. More than 100 organizations have been involved in GATE ecosystem.

Grigorios Chatzikostas
The diagram is very well organized and makes sense. In order to make it a bit bore informative, bellow the first row (grey with phases) I would add another row explaining in one sentence the mission of each phase, something like, for PREPARATION: Detailed planning and organizational design, INTITATION: CoE launch and traction generation, GROWTH: Acceleration of development and expansion of scope MATURATION: Sustainability and growth for the post-Teaming period

Grigorios Chatzikostas
The narrative from this point until the end of the chapter is super long and loose. Please consider shortening and adding tables bullet points or same small diagram in between.

Step 7: Feedback collection (Budget)

Dear Grigoris,

Thanks for the information and I know this is always a challenging task, but I'm sure that we can deal with it in the end.

So their thoughts were that they at least need the current proposed PMs for the overall data market but require an additional 15 PMs for individual support.

Furthermore, the WDCC – and datahubs behind that – were also complaining, but I think every data hub/platform in the end will need more resources, so let's give them not too much.

Finally, there was still a small error in the avg rate for WR which should be 7640; this was already communicated to Maja.

Now what I propose is that we move the relatively small number of PMs for WP3 and WP5 we had to WP2 so that the data hubs (WDCC) have some more resources. I don't think it is efficient to have few PMs in a WP.

Furthermore I propose to top-up WP4 to 45 PMs

I already reduced 'my' budget a bit in WP2 and 6, but necessary I am willing to give up my role as scientific coordinator to make it work for WP4.

Please, see attached the concrete counter proposal from our side.

I know that this will be difficult to accomplish because I expect that others will come with similar requests, but I think I explained it is not just about the money as such but that there are clear and solid arguments behind it.

Step 8: Work Allocation

- "The one who will implement, writes"
- Inform everybody upfront what is their assignment and deadlines
- Secure commitment

STRATEGY

- Introduce teams
- Appoint team leaders
- Explain expectations

COLLABORATION

- Ambitious yet achievable
- Not only time bound but also related to quality
- "Ask a lot, but take what is offered", Russian Proverb

TARGETS

- Telcos on regular basis
- 1 Physical meeting max.
- Increased intensity closer to deadline

COMMUNICATION

Step 8: Work Allocation

Section	Topic	Responsible	Expected No of pages	Assigned to	Contributors	Due date	status	Qu lev
	Abstract							
introduction	Infographic	Grigoris	1	Milan				
1.1.1	Background and Vision	Grigoris	1,5	Stavros		22/02		
1.1.2	Project objectives	Grigoris	1,5	Stavros	All Partners			
	Technological Objectives	Grigoris			UBITECH			
	Business Objectives	Grigoris			WR			
	Scientific and Innovation Objectives	Grigoris			All Partners			
	User engangememt objectives	Grigoris			ILVO			
1,2	Relation to the WP	Grigoris	2	Dragana	All Partners			
1.3.1	Overall concept underpinning the project (plus diagram)	Grigoris	1	Grigoris				
1.3.1.1	Main Challenges to be tackled (eg. Legal, technical, monetization etc)	Grigoris	1	Grigoris				
1.3.1.2	Technological Approach and Developments	Grigoris	3	UBITECH				
1.3.1.3	Description of the Use Cases/Challenges + Stakeholders Description (Data Hubs and FMIS)	Grigoris	3	ILVO	All Stakeholders (Data Hubs and FMIS)			
1.3.1.4	Data Governance	Grigoris	1	Maastricht University				
1.3.1.5	Business Modeling	Grigoris	1	WR				
1.3.2	Position of the project	Grigoris	1	Stavros				
1.3.3	National and international projects linked with proposal	Grigoris	1	Dragana				
1.3.4	Overall methodology (Lean Startup - Multi-actor Approach)	Grigoris	1	Grigoris				
1.3.5	Gender Aspects	Grigoris	0,5	Stavros				
1.4.1	Progress beyond state-of-the-art	Grigoris						
1.4.1.1.	Progress beyond state-of-the-art - Technologies	Grigoris	1	UBITECH	All Stakeholders (Data Hubs and FMIS)			
1.4.1.1.	Progress beyond state-of-the-art - Business Models	Grigoris	1	WR	All Stakeholders (Data Hubs and FMIS)			
1.4.2	Innovation potential	Grigoris	1	Stavros				
2.1.1	Expected strategic impact	Stavros	1,5	Grigoris				
2.1.2	Expected impact according to the work programme	Stavros	6	Nikos Marianos	All Partners			

Step 9: Write in Iterations

Why?

To get feedback faster and more efficient from as many people as possible

To secure consensus on key aspects of the proposal

To spot inconsistencies, overlaps or conflicts and tackle them on time

To demonstrate progress to the team, acknowledge contributions and maintain/ increase engagement

Step 9: Write in Iterations

How?

- Concept
- Objectives
- Work packages description

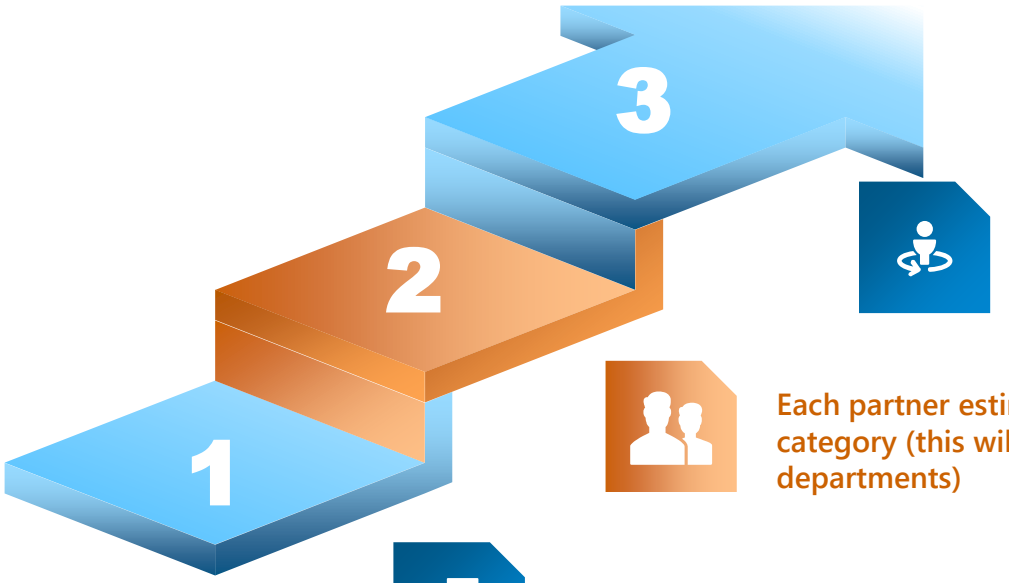
- Methodology
- Impact
- State-of-the-art

- Rest of Section 1
- Measures to maximize impact
- Partners profiles

- Management
- Budget
- Graphs and text formatting

Step 10: Plan the budget

Key preparatory stages

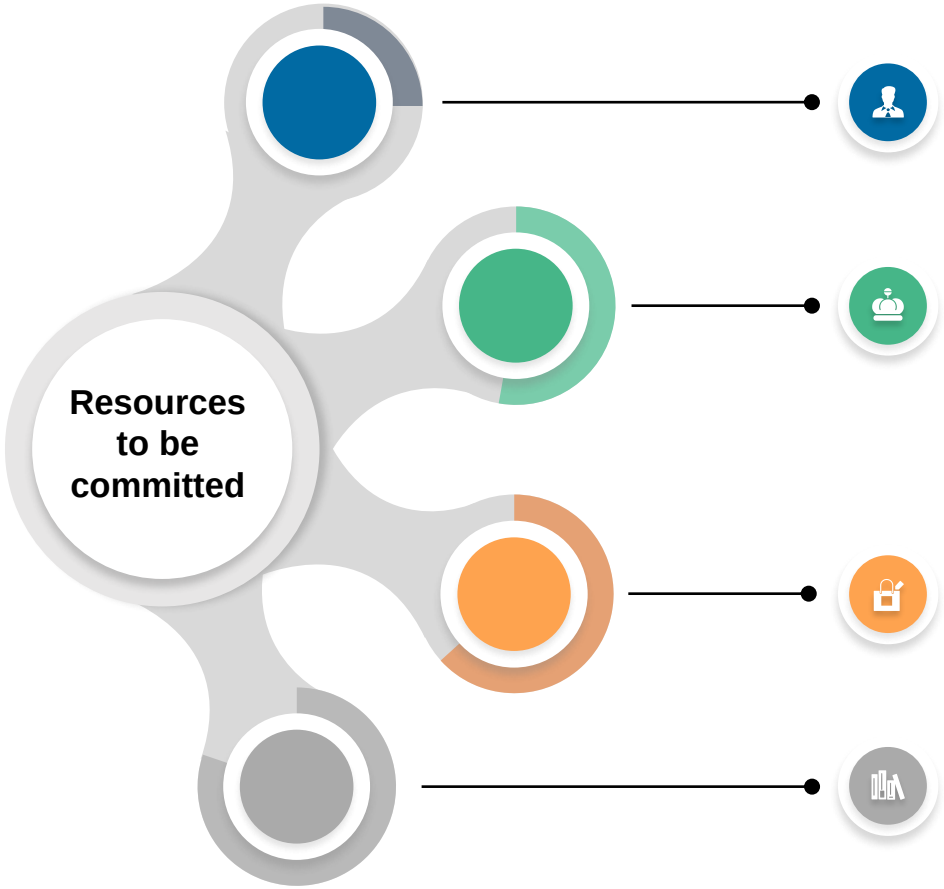


Gather the cost figures for all categories from each partner

Each partner estimates their cost for each category (this will involve finance/business departments)

Identify the cost categories

Step 10: Plan the budget



Explain and justify what you will spend money on
Check consistency with Part A

What resources will be made available to the project (e.g. teams, facilities, equipment)?

What will be the major costs?

- **Show how the resources will be put into place and integrated in a coherent way, including any not funded**
- **Show how the overall financial plan for the project is adequate**

Step 10: Plan the budget

Step 10: Plan the budget

01. PROS

Private 1-to-1 negotiations

- More effective
- Reduces drama
- Coordinator can keep better control

01. PROS +

– 02. CONS

02. CONS

- Triggers backroom politics
- Raises complains (sometimes)
- More work for the coordinator

01. PROS

Open negotiation

- More transparent
- Everybody feels engaged
- Partners contribute in workload

01. PROS +

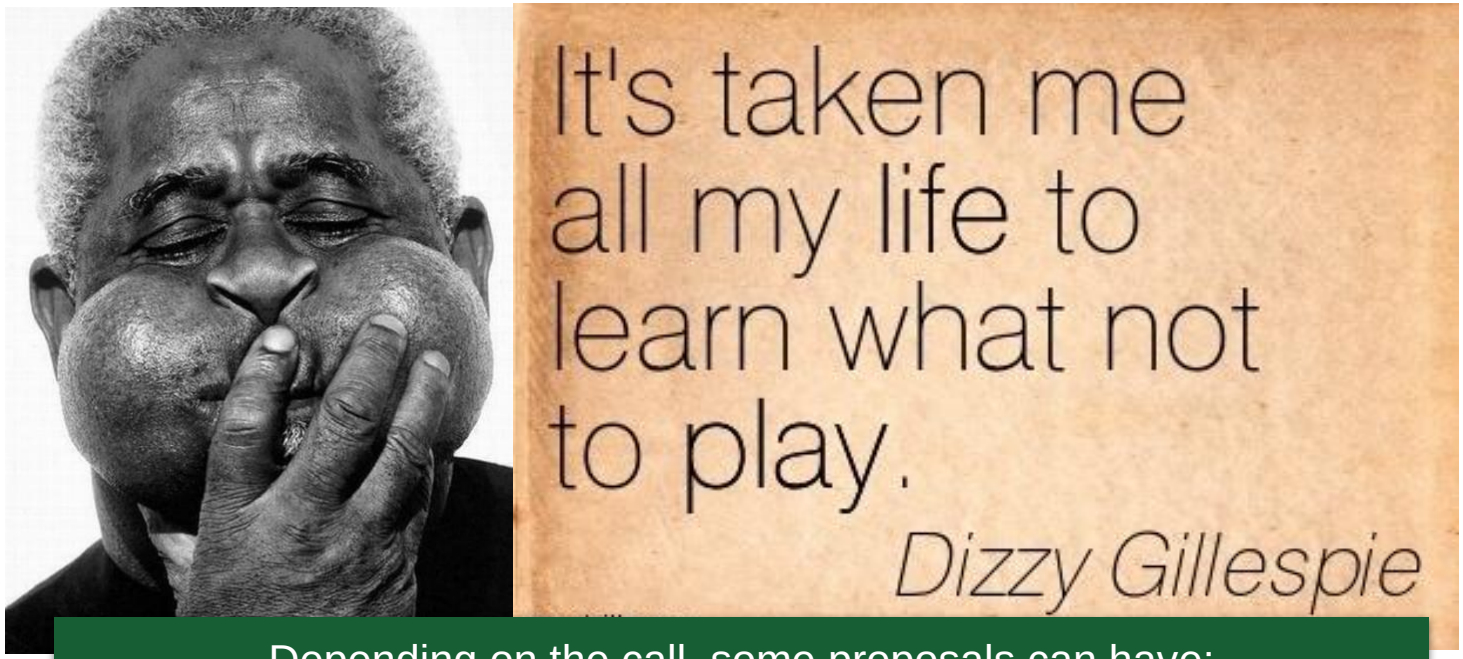
– 02. CONS

02. CONS

- It can boost drama
- Time before deadline is precious
- Expertise and attitude are crucial

Step 11: Finalize and Submit

Respect the page limits – Write only what is essential!



Depending on the call, some proposals can have:

1st stage	RIA	CSA	EIC Accelerator
10 pages	70 pages	50 pages	30 pages

Step 11: Finalize and Submit

DOs

- Ask different people to check the whole text
- Make sure formatting is according to specs
- Make sure .pdf looks like word document
- Look at all questions in the platform upfront so that you have answers

DOWNLOAD AND CHECK AFTER YOU SUBMIT!

DON'Ts

Keep the proposal in separate files

Use different computers/ versions of software

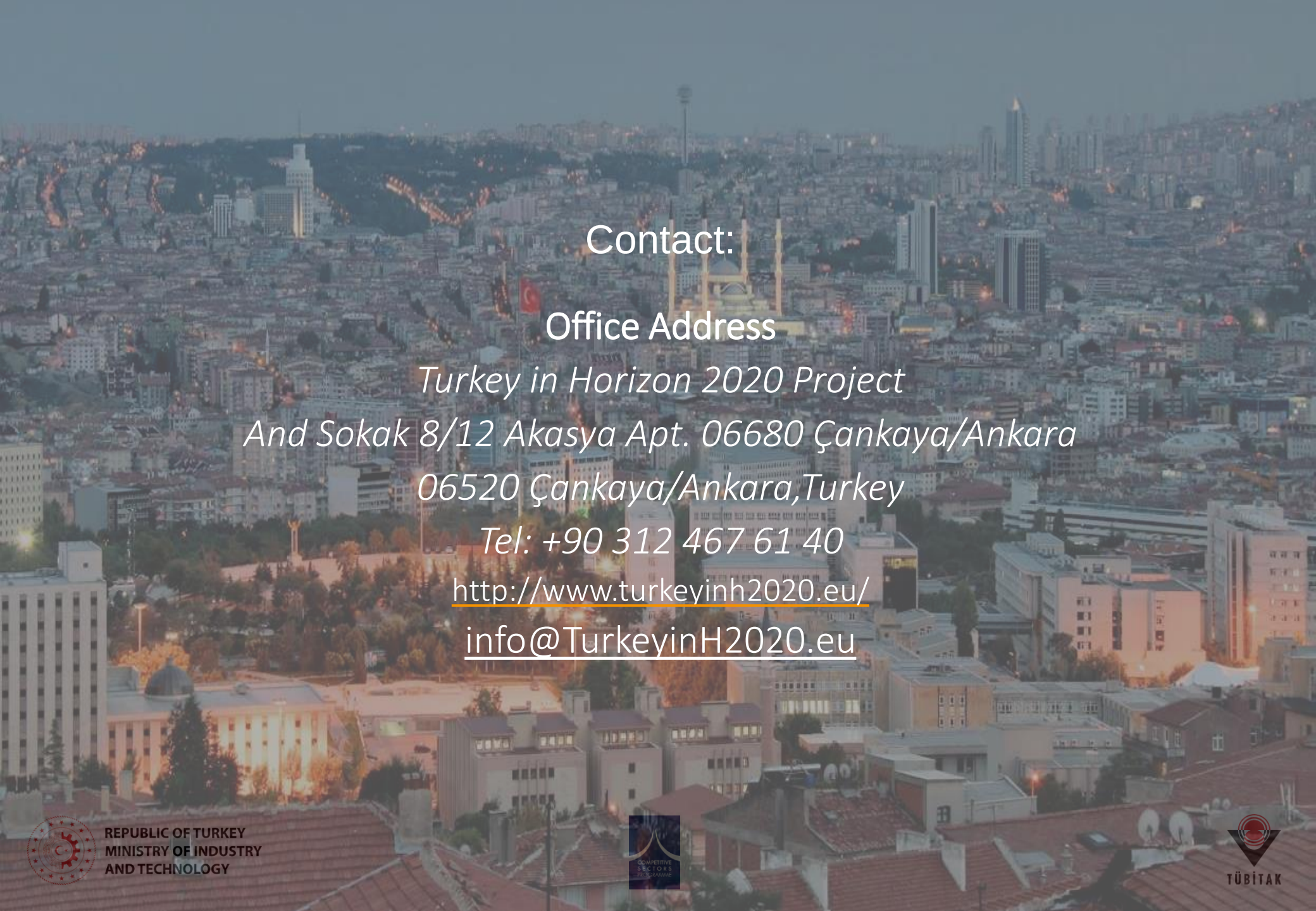
Forget to fill in all tables and Sections

Submit the last moment of the deadline

MAKE IMPORTANT CHANGES IN THE LAST MOMENT

TIP: Start making trial submissions a couple of days before the deadline to test the system, BUT make sure that at the end you have the correct version uploaded!

Step 12: Celebrate with your team



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