



This project is co-financed by the
European Union and the Republic of Turkey

Bu proje Avrupa Birliđi ve Türkiye Cumhuriyeti tarafından
finanse edilmektedir



Technical Assistance for Turkey in Horizon 2020 Phase-II

EuropeAid/139098/IH/SER/TR

Proposal template, Impact Canvas and Practical aspects of CA and MGA

General & Introductory Training in Horizon Europe (GIT-5)

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Online, 8 Apr 2021

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REPUBLIC OF TURKEY
MINISTRY OF INDUSTRY
AND TECHNOLOGY



COMPETITIVE
SECTORS
PROGRAMME



TÜBİTAK

On templates...

- Templates are important – ***not only a technicality***
- Form follows function
- Trade offs:
 - too (much) scientific
 - too (much) industry
 - too (much) sale pitch
- Compromise: accommodate all above aspects even partly
- With a bad template several hundreds of people will ... suffer
- A good template shall help all write better proposals and – ***very important***: help people ***build better learning curves***

Deficiencies of the old templates

1.1 Objectives

- Describe the overall and specific objectives for the project, which should be clear, measurable, realistic and achievable within the duration of the project. Objectives should be consistent with the expected exploitation and impact of the project (see section 2).

1.2 Relation to the work programme

- Indicate the work programme topic to which your proposal relates, and explain how your proposal addresses the specific challenge and scope of that topic, as set out in the work programme.

1.3 Concept and methodology

(a) Concept

- Describe and explain the overall concept underpinning the project. Describe the main ideas, models or assumptions involved. Identify any inter-disciplinary considerations and, where relevant, use of stakeholder knowledge. Where relevant, include measures taken for public/societal engagement on issues related to the project. Describe the positioning of the project e.g. where it is situated in the spectrum from 'idea to application', or from 'lab to market'. Refer to Technology Readiness Levels where relevant. (See [General Annex G of the work programme](#));

Deficiencies (cont'd)

(b) Methodology

- Describe and explain the overall methodology, distinguishing, as appropriate, activities indicated in the relevant section of the work programme, e.g. for research, demonstration, piloting, first market replication, etc.

1.4 Ambition

- Describe the advance your proposal would provide beyond the state-of-the-art, and the extent the proposed work is ambitious.
- Describe the innovation potential (e.g. **ground-breaking objectives, novel concepts and approaches, new products, services or business and organisational models**) which the proposal represents. Where relevant, refer to products and services already available on the market. Please refer to the results of any patent search carried out.

Comparison of old and new templates

- **OLD:** 70 pages
- **New:** 45 pages (**but...**)
- **OLD:** Section 1 (Excellence): 4 subsections
- **New:** Section 1 (Excellence): 2 subsections (**but...**)
- **OLD:** Section 2 (Impact): 2 Sections
- **New:** Section 2 (Impact): 2 'old' + one new: **Impact canvas**
- **OLD:** Section 3 (Implementation): 4 Sections
- **New:** Section 3 (Qual. & effic. of implem.): 2 Sections

Impact canvas

- Perhaps the most ‘new’, ‘innovative’, ‘game changing’ part in the new template? ...
- Some prehistory:
- With the business model canvas of Osterwalder, the idea of providing information in such a structured form became more and more popular
- Horizon Results Booster currently uses two other ‘canvas’ templates:
 - The Lean Canvas
 - The Value Proposition Canvas

The HE Impact canvas

- **Caution:** It is meant to be a *summary*
- It consists of six parts:
 1. Specific needs
 2. Expected results
 3. D&E&C measures
 4. Target groups
 5. Outcomes
 6. Impacts



Final remarks for the impact canvas

- It is not as ‘easy’ as it seems...
- Needs hands-on practice
- Don’t forget: practice makes the master!
- Ideal: to be composed with interaction amongst partners
- Also: ***it needs time*** – it is not wise to leave for the last moment
- Even better: Ideal to ***start your proposal from this section*** and then build and elaborate on the other parts!

Other points of the new template


- **New** Section 1.1 Objectives and ambition:
- Combines and integrates following of the old template:
- **OLD** Section 1.1 Objectives
- **OLD** Section 1.2 Relation to the work programme
- **OLD** Section 1.3a Concept
- **OLD** Section 1.4 Ambition
- And all these in only (as suggested) 4 pages!
- (Don't dare to come up with an estimate how many pages were used for these sections as of today...)

Other points (cont'd)

- **New** Section 1.2 Methodology
- Corresponds to:
- **OLD** Section 1.3b Methodology
- includes also references to national or international research and innovation activities linked to the project (in the past was under the

1.2 Methodology [e.g. 15 pages]

- Describe and explain the overall methodology, including the concepts, models and assumptions that underpin your work. Explain how this will enable you to deliver your project's objectives. Refer to any important challenges you may have identified in the chosen methodology and how you intend to overcome them. [e.g. 10 pages]

 *This section should be presented as a **narrative**. The detailed tasks and work packages are described below under 'Implementation'.*

Final remarks for the new templates

- The new proposal template (as any other) has to be lived-in by the people
- Consider the 10.000 hours rule ;-)
- Less pages does not necessarily mean less effort
- Impact canvas is tricky: looks simple but has to be filled-out with good quality information
- Impact canvas can be the starting point for a proposal

MGA and CA

- MGA: ***we simply follow the rules*** – if we don't like them, it may be too late to change them!
- (But it is still good to be aware of them! Many organisations are not aware of them at all...)
- CA: here ***we can define the rules*** and the conditions – there are many degrees of freedom!

MGA and CA: people involved and 'confronting interests'

Two worlds apart:

1. Legal and admin experts from the one side
2. Scientists and researchers on the other side

Both worry for different aspects:

1. The first care to avoid 'problems' and organise work in assembly lines
2. The second ones care to have their project starting asap, financing arriving to hire people for work in the project

Some good practices to follow

Some conditions to cope with proactively:

1. Which background knowledge each party shall use within the project? *To be stated clearly!*
2. Which foregrounds shall be built during the project lifetime and by whom? *To be stated clearly!*
3. How foregrounds shall be shared after the project terminates? *To be stated clearly!*
4. How shall use of individual background IPs shall evolve / affect exploitation of the project results? *To be stated clearly!*

From our experience:

1. Background IPs are sometimes mentioned but usually are *not very relevant*
2. Foregrounds are normally related to Deliverables – however, there responsibilities are not clear – *blurry ownerships*
3. Regarding the use of foregrounds after the project terminates *lots of open issues appear and remain untackled*
4. Same also regarding the use of individual background IPs after the project terminates *remain as open issues*

In short: we plan for the marriage but not for the divorce

Final remarks & take away messages

- The new proposal template in Horizon Europe and the impact canvas may provide the means for better identifying the various assets ('Expected results' & 'Outcomes')
- Responsibilities and ownership can be from an early on stage decided and defined
- One can still keep their **rose-colored glasses** while also leaving relatively little space for future misunderstandings
- Inherent difficulty: proposals are written under the state of enthusiasm: *over promising* and *under delivering*.
- All worth to try the opposite: *under promising* and *over delivering*

For follow-up questions contact me at:

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Q&A

Time to ask your
questions!

Teşekkür ederim!

Thank you!

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