ERA 2024 Knowledge Day

Practical tips and tricks for designing a successful project proposal

9/11/23
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Co-funded by the European Union
Personal Introduction

• Senior researcher at PLOCAN Offshore Observatory Platform, Gran Canaria
• Ocean renewable energy economics and business
• Grant write proposals
• Coordinate proposals
PLOCAN has a unique multipurpose technological ecosystem in the marine environment, designed for effective environmental protection.

Ideally located, the PLOCAN test site has optimal environmental conditions for year-round operation.

- Logistics and infrastructure
- Sensing and monitoring
- 23 km² test site
- Wind power density: 300-400 W/m²
- Wave power density: 4-8 kW/m
- Multipurpose infrastructure
- Depths between 8 and 800 m
- Continuous environmental monitoring

PLOCAN accelerates new technologies to market.

- Job creation
- The development of new technologies creates new jobs.

Respect for the environment
- Operation sensing and monitoring ensure respect for the environment.

Attracting investment
- With more than 50 European projects, PLOCAN is a unique space for new business opportunities.

- 25 Sq km
- Of ocean Test space
International Consortium of Research Staff Associations

- National research staff associations
  - Europe: Ireland, UK, France, Italy, Portugal, Ukraine
  - USA, Canada
- Research Centres RSA
  - EMBL (European Molecular Biology Laboratory Staff Association)
  - Max Plank (to be confirmed)
- Research career development association
  - Vitae UK
- Individual members 750 via RRING Community
2018: EU H2020 SwafS14 RRING project: [www.rring.eu](http://www.rring.eu)
- Responsible Research and Innovation network globally
- The project is a 3-year RIA, ended 2021
- 22 partners, 18 countries, 6 subcontractors. UNESCO is the lead partner

2019: EU H2020 SwafS5 GRRIP project: [www.grrip.eu](http://www.grrip.eu)
- Grounding Responsible Research and Innovation in RPO
- 4 years Project commenced in Jan 2019, end 2022
- 12 partners, €1.5M

2022 ERA45 OPUS project [www.opusproject.eu](http://www.opusproject.eu)
- Assessment of research and researchers at Research Performing Organisations (RPOs) and Research Funding Organisations (RFOs) towards a system that incentivises and rewards researchers to practise Open Science
- 15 partners. €1.5M
- 3 years, Start date September 2022
European projects that I led the proposal submission and Coordinate

2023 ERA50 SECURE project [www.secureproject.eu](http://www.secureproject.eu)
- 15 partners - €1.5M.
- 2 years - Start date January 2023
- Revision of the European Framework for Research careers, and Tenure Track like models

2023: CL5-D3-02-03 H2heat project: [www.h2-heat.eu](http://www.h2-heat.eu)
- Innovative Hydrogen renewable energy carrier production for commercial building heating – a full supply chain Demonstration
- 5 years - Project commenced in September 2023.
- 12 partners, €13M
Step 1 EC portal – proposal call

• You have searched and found your ideal call text.
• Scope matches your institution and your missions.
• Budget is adequate for your activities and objectives.
• Look for previous past projects in CORDIS to understand what was researched before (avoiding repetitions) but also potential synergies
• Closing submission deadline is realistic.
  • Ideally 6 months preparation
  • Possible in 3 months – but watch vacation periods
  • Panic in 2 months
Step 2 Talk to Senior Management in your institution!

- Inform senior members for creating proposal
  - Research Manager
  - Technical director, - any new equipment or testing
  - Finance
Step 3 – create a Concept Abstract

• Core of project
• Used to invite all partners
• 2 pager contains
  • Call text essential details: call title link, dates, budget
  • Project core objectives- one line each
  • Initial Workpackage WP plan- one line each
  • Assign workpackage leaders!!!! Easy to forget.
  • List the intended consortium
Step 4 - Talk to NCP

• You must understand everything in call text.
  • Sometimes call texts are
    • not so clearly written
    • are vague
    • Cover enormous range of activities, or cover nothing

• You must ideally include everything in proposal that is in call text.
  • If leave out something, have strong justification

• If in doubt – contact NCP relevant to topic - usually very helpful
Step 5 - writing team options

1. You do everything including Part B writing - You will need 3 full-time (FT) months, you must have low extra commitments. 6 months PT

2. Consortium team shared:
   - 2.1: You do first draft, you create first draft of budget and core team edits, 2 months
   - 2.2 Shared co-creation
     - Part B shared
     - Budget – partners request budget
     - Most difficult

3. Grant Writer – terms depends on contract agreement and fees
   - Writes part B
   - Is Grant writer responsible for Budget and Portal?
   - Costly – upfront fees (difficult for public bodies, success fees)
Step 6 – Consortium build

• Core partners for main objective—technical or social
• Social sciences partner(s)
  • Public engagement
  • D&C
  • Responsible research and Innovation (RRI)
  • Gender Equality and Gender Dimensions in the research
  • Open Science and data management
• Exploitation partner(s)
  • Tech = Business team
  • Social – policy team
• Issue invitations with concept abstract
Step 6 – Consortium build stage 2 - which partners

- Ideally partners are from past projects/ collaborations
- Search past projects – coordinators or key partners
  - Especially projects listed in call text
- Recommendations from existing partners
- Tech companies – lots of Google searching and emails.
- Partners listed at the end of the call text page
- EU networking days
- Consortium building can take 50% of your time if new area or more than 50% new partners
UK now eligible as full partner

Try add a Ukrainian partner
Step 7 – Budget

• I will not discuss Lump Sum budget option.
• There is never enough budget.
• CSA (and RIA) all 100% - even SME.
• IA are the tricky calls.
  • SME and private entities at 70%. 30% self funding. Difficult for equipment costs.
    • Consider member state R&I tax credits
  • NB make certain partner is 70% or 100% funded. Best way to check is to enter them as partner go to edit forms and budget and it states there
Step 7 – Budget part 2 Budget spread

• I repeat - There is never enough budget.
• Coordinator- always give enough
• Core team + coordinator 50%
• Try have small consortium 10—12 partners
  • consortium matches the expertise required by the proposal
• However, 20 partners or more needed sometimes.
Step 7 – Budget part 3 - Thresholds and Part B

• €430,000 EC contribution – if exceed, partner will need external audit.
  • Not trivial for partners.
  • Costs can be included

• Table 3.1h. purchase cost items (travel and subsistence, equipment and other goods, works and services) per partner
  • Above 15% ODC / personnel costs, partners budget needs to be added to part B. Minim 8-10 precious lines of space. 10 partners over 15% = 2 pages of tables!!
  • In social science projects, Only coordinator and may D&C partners should have the OGS costs. Keep Travel costs of remaining partners under 15%.
## Tech projects with complex budgets have on Capex mastercopy page

<table>
<thead>
<tr>
<th>WP</th>
<th>Details</th>
<th>Partner</th>
<th>Equip Cost</th>
<th>OGC + insta</th>
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<tbody>
<tr>
<td>WP3</td>
<td>String/ collectors</td>
<td>A</td>
<td>€2,000</td>
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<td>WP3</td>
<td>Installation, O&amp;M, transport contract</td>
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<td>WP3</td>
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<td>WP3</td>
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<td>€30,000</td>
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<tr>
<td>WP3</td>
<td>Moorings &amp; anchors €30,000; eDNA bouy upgrade €30,000</td>
<td>C</td>
<td>€60,000</td>
<td></td>
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<tr>
<td>WP3</td>
<td>Transport and instalation and decommission</td>
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<td>€80,000</td>
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<tr>
<td>WP3</td>
<td>Nets and Electro fishing gear</td>
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<tr>
<td>WP3</td>
<td>IT €30,000; other equipment €30,000</td>
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<td>€60,000</td>
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<td>WP4</td>
<td>Demo 1 &amp; 2; hydrophones €50,000; 2D camera €50,000</td>
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<td>WP4</td>
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<td>La Terrazas overwater cameras service contract</td>
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<tr>
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<tr>
<td>WP4</td>
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<td>E</td>
<td>€50,000</td>
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<tr>
<td>WP4</td>
<td>Telemetry Bouy _ wifi</td>
<td>E</td>
<td>€50,000</td>
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<tr>
<td>WP4</td>
<td>IT software</td>
<td>E</td>
<td>€50,000</td>
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</table>
Budget tips

• List per workpackage
• Compress detail and combine items, but still must be clear
• Final 15% of ODC do not need to be included in Table 3.1H
  • This is difficult to decide what to not detail.
  • Travel –
    • good for project detail - however, could be not detailed if in 15% ‘not detailed’
    • full detail required if included in Table 3.1H
• Do full budget, from start
  • easy to forget the impact of 25% overhead
  • Impact of 70% or 100% funded partner
  • Try stay to budget max limit
• In your budget excel, try and build in 2 or 3 cross checking systems for errors. They will happen, and sometimes identified too late when enter into portal.
Budget tips – your own budget

• Give yourself enough budget. It has to be worth while.
• Try estimate the amount of staff you will need to cover your tasks
  • FT or PT
  • Rates

<table>
<thead>
<tr>
<th>WP1</th>
<th>WP2</th>
<th>WP3</th>
<th>WP4</th>
<th>WP5</th>
<th>WP6</th>
<th>WP7</th>
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<tr>
<td>Prep</td>
<td>StakeH</td>
<td>Demo</td>
<td>Monit DTO</td>
<td>Relpic</td>
<td>Coord</td>
<td>D*C</td>
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</table>

Coord
PM
Engineer
DTO
Business

9 4 20 21 16 27 11 108
Timelines - Gantt - Budget v Objectives v Time

- Always give project enough time, especially tech projects

### Gantt – Timing of WPs Tasks

<table>
<thead>
<tr>
<th>WP</th>
<th>Description</th>
<th>Deliverables: Plans and Reports</th>
<th>Task Milestone</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Methodology and Preparation</strong></td>
<td></td>
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<tr>
<td></td>
<td>T1.1 Establish Baseline data collection methodology (D1.1)</td>
<td></td>
<td>(M1)</td>
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<tr>
<td></td>
<td>T1.2 Methodology for monitoring and data gathering for demos(D1.1)</td>
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<td>(M1)</td>
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<tr>
<td></td>
<td>T1.3 Define methodology for Evaluation of data (D1.1)</td>
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<td>(M1)</td>
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<tr>
<td></td>
<td>T1.4 Detailed Planning, preparation and design methodology (D1.1)</td>
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<td>(M1)</td>
</tr>
<tr>
<td></td>
<td>T1.5 Detailed Planning, preparation and design for demos(D1.2)</td>
<td></td>
<td>(M5)</td>
</tr>
<tr>
<td></td>
<td>T1.6 Gathering of baseline data for demos (D1.2)</td>
<td></td>
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<tr>
<td>2</td>
<td><strong>Stakeholder engagement, MPA, Education, Fisher and Litter Entrepreneur programs</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>T2.1 Stakeholder engagement (D2.1,2.2)</td>
<td></td>
<td>(M3)</td>
</tr>
<tr>
<td></td>
<td>T2.2 Blueprint MPA platform and network (D2.3,2.4,2.5)</td>
<td></td>
<td>(M5)</td>
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<tr>
<td></td>
<td>T2.3 Develop + extend the Problem Open Schooling Program to the AA basin (D2.6,2.7)</td>
<td></td>
<td>(M5)</td>
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<tr>
<td></td>
<td>T2.4 Fisher Guardian Program (D2.8,2.9)</td>
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<td>(M11)</td>
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<tr>
<td></td>
<td>T2.5 Citizen Litter Entrepreneur program (D2.8,2.9)</td>
<td></td>
<td>(M4)</td>
</tr>
</tbody>
</table>
Part B tips

• **NB!!** Make sure you have the correct page length!!
  • Download template from portal
  • Read the Guidelines.

• Make certain your workpackage outline is locked down. Change or deletion or addition, causes MAJOR Headaches to the budget
Final week - Panic

• Never underestimate stress of last week.
• Give enough space time – CLEAR your calendar.
• Have Part B final edition ready for all partner inspection 1 week before deadline
• Last minute consortium partner additions
• Last minute budget requests.
• Budget usually only entered in portal in last day
• Part A partners details need to be checked on last day
  • include in the access to the proposal all the institutional contact points
Thank You

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Chair ICoRSA

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