



ERA 2024 Knowledge Day

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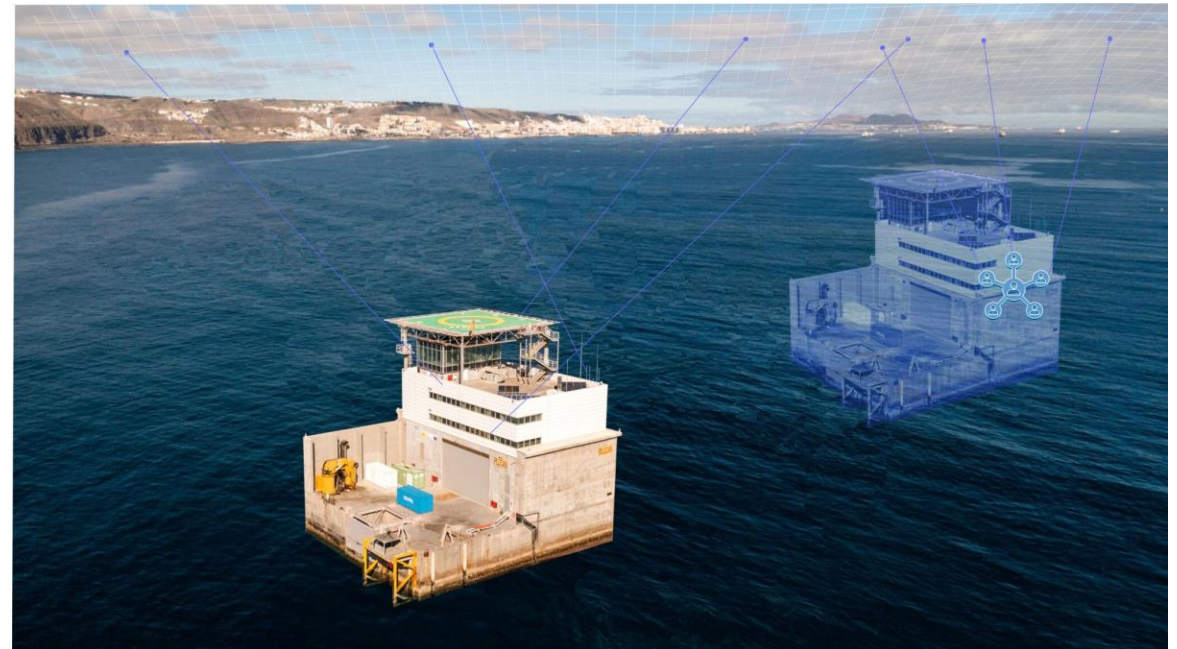
Practical tips and tricks
for designing a successful
project proposal

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 Marine Test Site



The oceans cover 70% of the planet's surface and must be managed responsibly and sustainably.

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 0 and 600 m
- Continuous environmental monitoring



Technology acceleration

PLOCAN accelerates new technologies to market.



Job creation

The development of new technologies creates new jobs.



Respect for the environment

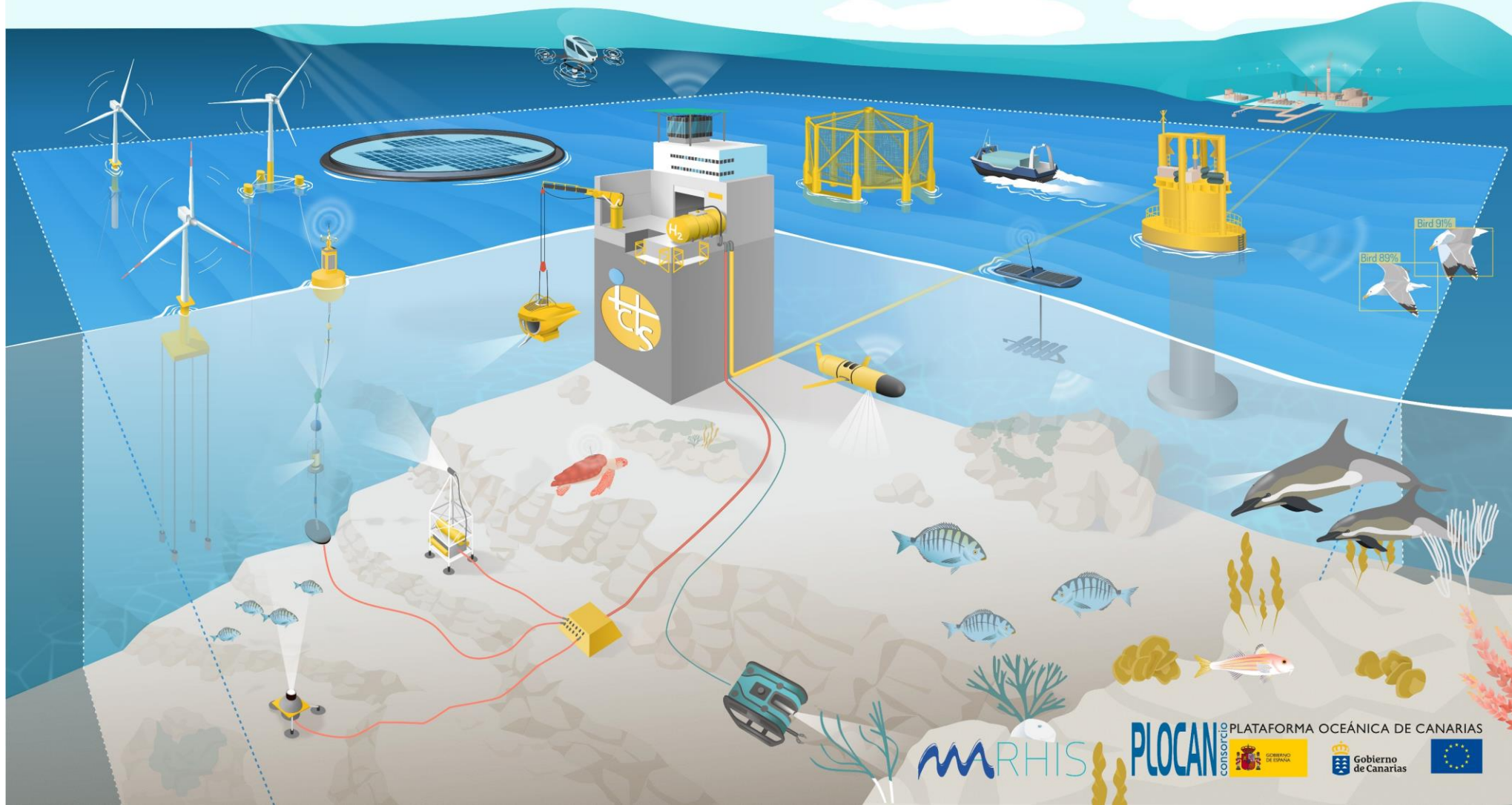
Operation sensing and monitoring ensures respect for the environment.



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

The logo for ICORSA members features the letters 'IC' in green, a globe icon with blue and green dots, and the letters 'RSA' in blue. Below this, the word 'members' is written in a bold, dark blue sans-serif font. The entire logo is set against a background of overlapping light blue and green circular shapes.

ICORSA
members

- **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**

European projects that I led the proposal submission and Coordinate

2018: EU H2020 SwafS14 RRING project: 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

- 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

- 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

- 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

- 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

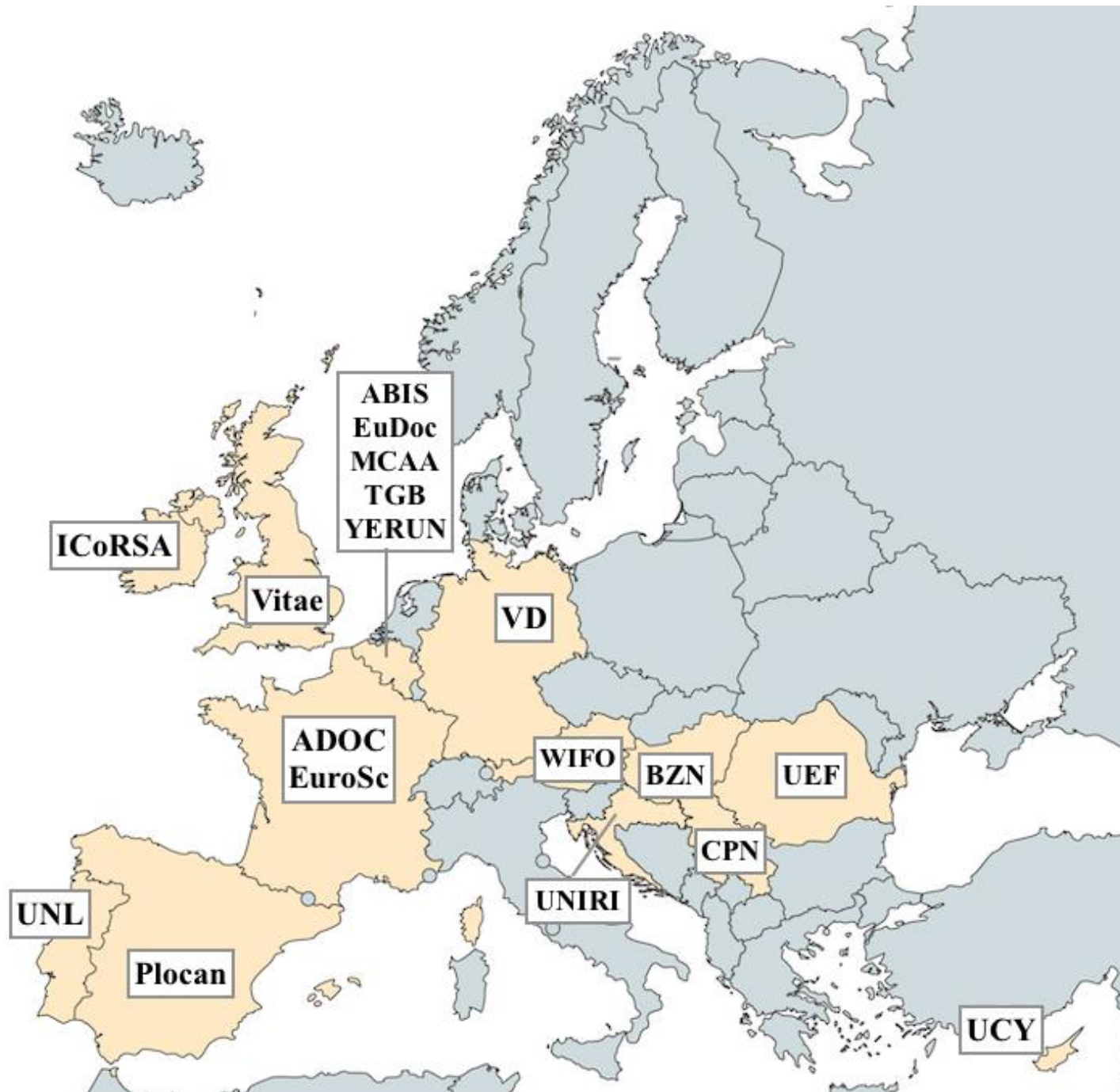
- Core partners for main objective— technical or social
- Social sciences partner(s)
 - Public engagement
 - D&C
 - Responsible research and Innovation (RRI)
 - Gender Equality and Gender Dimensions in the research
 - Open Science and data management
- Exploitation partner(s)
 - Tech = Business team
 - 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

WP	Details	Partne	EquipCost	OGC + insta
WP3	String/ collectors	A		€2,000
WP3	Installation, O&M, transport contract	A		€65,000
WP3	Misc labs supplies	B		€2,000
WP3	Equipment for water sampling	B		€3,000
WP3	CTD sensor equipment	B		€30,000
WP3	Moorings & anchors €30,000;eDNA bouy upgrade €30,000	C	€60,000	
WP3	Transport and instalation and decommission	C		€80,000
WP3	Nets and Electro fishing gear	C		€15,000
WP3	IT €30,000; other equipmemt €30,000	D		€60,000
WP4	Demo 1&2; hydrophones €50,000; 2D camera €50,000	D	€100,000	
WP4	Moorings anchors €22,000; Telemetry Bouy €40000	D	€62,000	
WP4	La Terrazas overwater cameras service contract	D		€25,000
WP4	hydrophones Demo 3 €50,000; 2D camera Demo 3 €25,000	D	€75,000	
WP4	IT hardware	E	€50,000	
WP4	Telemetry Bouy _ wifi	E		€50,000
WP4	IT software	E		€50,000

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 in 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

	WP1	WP2	WP3	WP4	WP5	WP6	WP7	
	Prep	StakeH	Demo	Monit DTO	Relpic	Coord	D*C	
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		Deliverables: Plans and Reports												Task							
														Milestone							
T1.1 = Task 1.1		Year 1			Year 2			Year 3			Year 4			Year 5							
(D1.1) = Deliverable 1.1 (M1= Milestone 1)		3	6	9	12	15	18	21	24	27	30	33	36	39	42	45	48	51	54	57	60
WP	Description																				
1	Methodology and Preparation																				
T1.1	Establish Baseline data collection methodology (D1.1)																				
T1.2	Methodology for monitoring and data gathering for demos(D1.1)																				
T1.3	Define methodology for Evaluation of data (D1.1)																				
T1.4	Detailed Planning, preparation and design methodology (D1.1)																				
T1.5	Detailed Planning, preparation and design for demos(D1.2,1.3,1.4,1.5)																				
T1.6	Gathering of baeline data for demos (D1.2)																				
2	Stakeholder engagement,MPA,Education,Fisher and Litter Entrepreneur programs																				
T2.1	Stakeholder engagement (D2.1,2.2)																				
T2.2	Blueprint MPA platform and network (D2.3,2.4,2.5)																				
T2.3	Develop+extend the Probleu Open Schooling Program to the AA basin(D2.6,2.7)																				
T2.4	Fisher Guardian Program(D2.8,2.9)																				
T2.5	Citizen Litter Entrepreneur program(D2.8,2.9)																				



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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